

# A TOOLKIT TO SUPPORT RESEARCHER WELLBEING (RES-WELL)

Practical strategies for UK research institutions, funders, and researchers in the context of emotionally or ethically challenging research

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# FOREWORD

There is a growing community of people involved in research who are acknowledging the impact that doing research can have on researchers' emotional wellbeing, seeking to better understand the experiences of those doing this kind of research and actively pulling together to enhance support and raise awareness. Since founding a peer support network (Emotionally Demanding Research Network) in Scotland in 2021 I have been lucky to have been able to meet some of these people, share ideas and collaborate. If we are all shouting about it together then none of us needs to shout quite as loudly or incessantly as we were doing on our own. Julie, my fellow network coordinator, and I read the RES-WELL project toolkit with a joyful feeling that we could rest our voices a wee bit.

In our peer support network we often share our experiences of doing emotionally demanding research and how it has affected us. Sometimes it is simply the power of solidarity with each other, of being shown clear evidence that you are not the only one dealing with this, that can help bolster us. If you are reading this toolkit because you are doing emotionally demanding research then I hope you find solidarity here, in knowing that others have experienced this, and are working to improve support.

Sometimes our network discussions centre around swapping ideas and strategies, supporting each other to work out what works, and does not, for each individual. This toolkit also addresses this need, offering simple ideas and tools that individual researchers, regardless of the point in their career or their level of experience, can draw on and try out for themselves. If you are doing, or planning to do, emotionally demanding research I suggest skipping to the last section and dipping in and out of it as and when you need to. Equally if you are supporting or supervising someone doing this kind of work these strategies will be useful tools for you, and them.

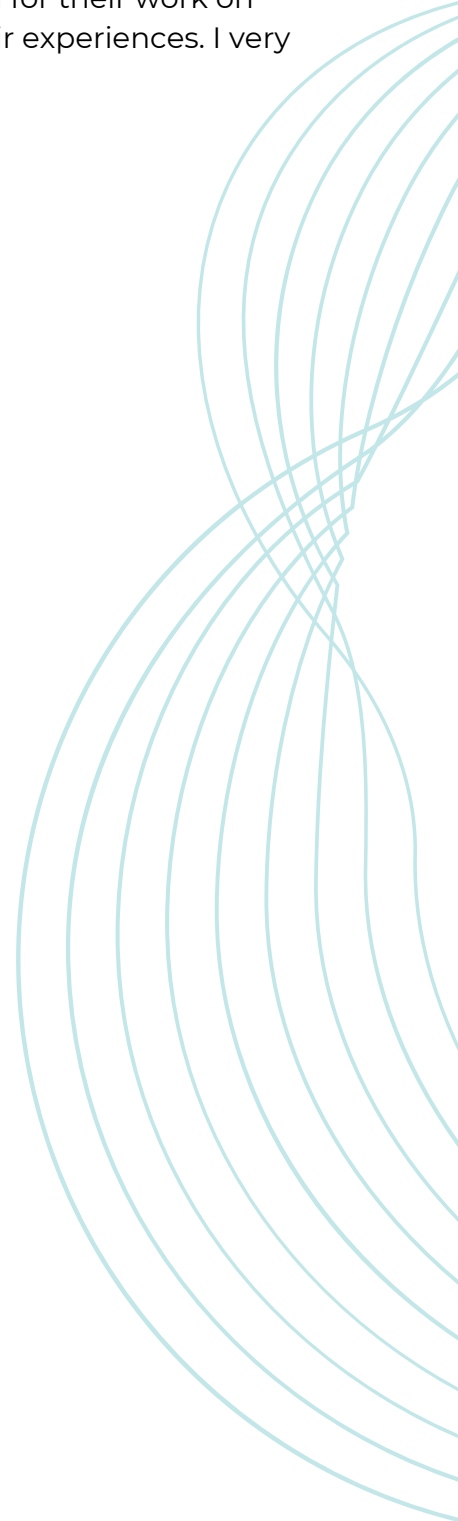
Solidarity and strategies can be really helpful but they are a drop in the ocean if the structural support is not also present. The people who come and share their experiences with us in our network have motivation in swathes, they want to do a good job and they want to do right by their participants, their colleagues, their institutions, their funders. They also often have a great understanding of their own emotional wellbeing and what can help or hinder that. But in order to do their best research they also need their line managers, teams, institutions, funders etc to provide sufficient and appropriate support, and often they are falling short of this.

Positive research culture in our institutions and organisations begins with listening to the needs and challenges of the research community and actively responding to those at all levels, from individual to institutional. If you are reading this because you

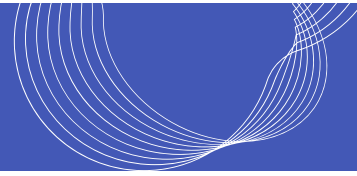
have heard that need, and are responding to it, then thank you! Here you will find insights into some of the challenging experiences that those in our research communities have had, and clear and practical responses that can be put in place to enhance support at different levels.

This is a hugely welcome piece of work that clearly demonstrates not just some of the complex issues that can arise in doing emotionally demanding research, but also offers solid strategies for researchers themselves, and importantly the institutions whose duty it is to support them. I am grateful to the project team for their work on this and all those who participated in the research and shared their experiences. I very much look forward to using it and sharing it as widely as I can.

***Susie Smillie***  
***Emotionally Demanding Research Network Scotland***



# EXECUTIVE SUMMARY



Supporting researcher mental health and wellbeing requires a multipronged approach from funders, institutions, senior staff, managers, supervisors, and researchers themselves. We recommend implementing the following key action points.

## KEY ACTION POINTS FOR FUNDERS (PAGE 15)

- Engage with researchers to better understand their needs;
- Incorporate advice on appropriate supports and safeguards into funding guidelines and briefings;
- Provide guidance and support for appropriate budget allocation;
- Ring fence funding for support measures in grant applications;
- Consider more flexible funding models.

## KEY ACTION POINTS FOR INSTITUTIONS (PAGE 28)

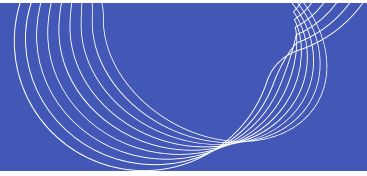
- Develop, formalise, and implement guidelines, safety protocols, and an embedded support system;
- Appoint institutional 'trauma-informed champions';
- Ensure ethical review applications include appropriate wellbeing mitigation strategies;
- Ensure bespoke training and resources for the specific mental health needs of researchers;
- Invest in peer support networks within and across institutions;
  - Proactively mitigating against the structural biases that affect marginalised researchers.

## KEY ACTION POINTS FOR RESEARCHERS (PAGE 57)

- The responsibility should be on institutions to support researchers working on emotionally challenging research. However, it is important to be aware of your limits and to seek support if you need it;
- It is helpful to know and employ coping techniques and self-care strategies to manage your stress in the immediate;
- If you do have symptoms, then you should seek support from your line manager, your institution, or the NHS. Do not let it go.

## KEY ACTION POINTS SENIOR STAFF, LINE-MANAGERS, SUPERVISORS (PAGE 39)

- Develop trauma-informed and skilled supervisory, line-managing, mentoring practices and procedures;
- Create safe spaces for teams to discuss the emotional impacts of their work;
- Proactively protect the emotional safety of junior staff and research teams;
- Advocate for institutional change;
- Be attentive to trauma in hiring new staff;
- Assess workflows and workload allocations to ensure these are trauma-informed.



## EMOTIONALLY DEMANDING RESEARCH

*“We define **‘emotionally demanding research’** as research that demands a tremendous amount of mental, emotional, or physical energy and potentially affects or depletes the researcher’s health or well-being. Based on the extant literature, we propose four types of emotionally demanding research experiences: (1) research on sensitive issues (e.g., violence, abuse, mental health, chronic or terminal illness, death), (2) research similar to personal trauma previously experienced by the researcher, (3) the researcher’s experience of traumatic life events while conducting a study, and (4) unexpected events that arise during research in what was previously not identified as a sensitive issue. We are mindful that there may be additional types of emotionally demanding research experiences not represented by this typology.” (Kumar and Cavallaro 2018: 648)*

This framing of emotionally demanding research can be expanded by considering additional ways in which research can become emotionally demanding:

*“Firstly, research conducted in environments, or with specific populations, that impacts on the emotional wellbeing of the research team member, regardless of the topic of the research. Secondly, the impact of the relationship with a research participant, and the sense of responsibility and duty towards participants that this can evoke in researchers.” (Smillie and Riddell 2023: 81-82).*

## SECONDARY TRAUMA / VICARIOUS TRAUMA

*“**Secondary trauma** refers to the impact of indirect exposure to traumatic experiences. Secondary trauma is one of a number of terms used somewhat interchangeably (including vicarious trauma, burnout, compassion fatigue) to convey ideas about the transference, or rippling-out effects, of trauma from the original incident and the original victim-survivor. Burnout is more usually related to the demands of work (including caregiving and studying) and its contextual components, such as long hours, insufficient support or control, and heavy workload, than the specific nature of work involved. In the past, we might have considered researchers outside of the ‘at-risk’ groups for secondary trauma for a number of reasons: they rarely see the traumatic events that people experience, they rarely interact with people who have experienced trauma for more than a handful of occasions, and they do not have an explicit helping role in the situation. In addition, part of the reticence about recognising the potential for researcher secondary trauma may be, in part, due to traditional views of academic scientific endeavour as objective, detached and neutral, where researchers are not supposed to feel anything (other than perhaps satisfied or frustrated) about the work they undertake.” (Williamson et al. 2020: 55-56)*

# AIMS AND VISION OF THE TOOLKIT

**The aim of this Researcher Wellbeing (RES-WELL) toolkit is to offer tools for better supporting the mental health and wellbeing of researchers carrying out emotionally or ethically challenging research.**

From conducting fieldwork in difficult settings to working with sensitive and difficult data about people's lives, researchers can often feel the emotional impacts of their work. Researchers who are involved in research on violence and abuse, climate change, colonialism, poor mental health, severe depression, suicide, death, incarceration, forced displacement, and poverty, as examples, are often exposed to the traumatic experiences and suffering of others. It is also possible that some researchers are studying topics similar to their own lived experience of trauma, which can be emotionally demanding. In addition, researchers not working on such issues may also experience emotionally challenging responses due to their research context, personal experiences or more structural factors (i.e. a lack of support).

This can have **serious consequences for the mental health and wellbeing of researchers**, their ability to do their job and live a fulfilling life. In the worst cases, it can lead to vicarious or secondary trauma (as the negative emotional reaction to being exposed to the traumatic experiences of others) or re-traumatising for the researcher, which can require professional intervention. When coupled with **deeper research culture** issues including precarious early careers and a lack of supportive and inclusive environments, these consequences are exacerbated. **We have developed this toolkit as a means of helping funders, research institutions, and researchers themselves to more effectively put support mechanisms in place so that this does not happen.**

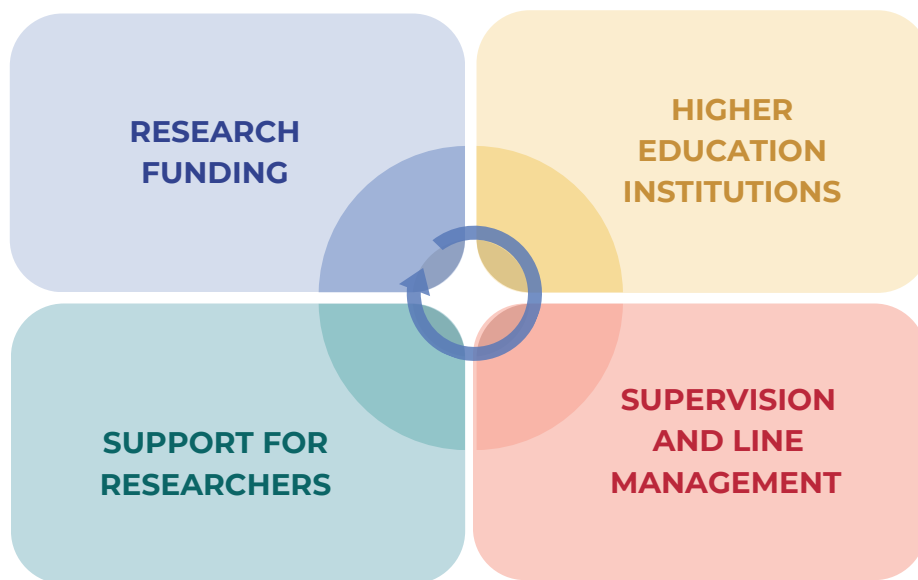
**The toolkit draws on a wide range of institutional supports that have been developed for other professionals**, including clinicians, police, social workers, lawyers, and psychologists.

There is an emerging evidence base of tools and techniques to support staff and navigate vicarious trauma in these fields, and our hope is that many of these evidence-based strategies can be integrated into research culture. In this way, the toolkit is intended as a means of starting the ball rolling towards wider systems change in academia.



Previous research has explored the problem and effects of vicarious or secondary trauma for researchers and offers guidelines and recommendations for how to support their mental health (e.g., Dickson-Swift [2022](#), Eliasson and DeHart [2022](#), Hammett et al. [2021](#), Howe [2022](#), Kumar and Cavallaro [2018](#), Nikischer [2019](#), Pineda et al. [2022](#), Schulz et al. [2022](#), Silverio et al. [2022](#), Smillie and Riddell [2023](#), SVRI [2010](#), [2015](#), Williamson et al. [2020](#)). **This toolkit builds on this literature by focusing on specific solutions, strategies and tools.** It incorporates **primary research** conducted by our team in 2023 through the administration of a survey amongst researchers, and the facilitation of **four pilot workshops** focused on researcher wellbeing in the context of emotionally and ethically challenging research.

**The toolkit is organised around three key entry points for bringing about a cultural shift in the research field: (1) Research Funding, (2) Higher Education Institutions, (3) Supervision and Line Management.**

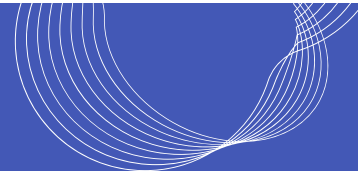


The main toolkit focused on funders, institutions, supervisors and managers is then followed by a **section targeted directly at researchers** to support them in understanding and dealing with the impacts of ethically and emotionally challenging research, and to help them recognise any signs for concern in themselves and others. This section provides **possible coping strategies and exercises** in the immediate term as well as **techniques for mitigating against the risk of vicarious or secondary trauma** in the long term.

This toolkit has been developed as a **collaboration** between three UKRI Future Leaders Fellows (FLF) across three UK research institutions (University of Exeter, University of Leeds, and University College London (UCL)), with funding from the FLF Development Network. As such, it draws on different disciplinary perspectives, and recognises the need for researcher wellbeing to be acknowledged and addressed as part of funding and institutional structures at the broadest level. **Our vision is for a widespread acceptance of the need for researcher wellbeing to underpin all research activities as part of good institutional practice in the UK and beyond.** We hope this toolkit makes a small contribution to this ambitious goal.



# BACKGROUND



This toolkit is the outcome of the [RES-WELL project](#) which ran from 1 October 2022 to 31 October 2023 with generous support from the FLF Network Development Plus Funds. The aim of the RES-WELL Project was to contribute to a **shift in research culture towards prioritising the mental health and wellbeing of researchers and their teams**, with a particular emphasis on those working on emotionally demanding or ethically challenging research topics. We believe that this cultural shift needs to start with institutions and have therefore developed this toolkit as a strategic resource for bringing about institutional change in this area.

In developing this toolkit, and as part of the RES-WELL Project more broadly, we conducted a qualitative study of the UK research landscape to better understand: the nature of problems facing researchers working on emotionally and ethically challenging research; what we already know about this problem; and what is being done in fields outside of academia where staff are also confronted with ethical and emotional challenges as part of their working lives (e.g., psychology and policing).



Firstly, we conducted a **literature review** on existing supports available for researcher mental health and wellbeing when working on sensitive and emotionally or ethically challenging topics as well as resources and tools available to support researcher wellbeing.



We then conducted an **online survey** addressing researchers' experiences of doing emotionally or ethically challenging research across multiple disciplines, career stages, and research contexts. With full ethical approval from UCL, the survey was anonymous, available to complete online and disseminated to researchers leading work on emotionally and ethically challenging research topics and their teams, utilising the UKRI's Future Leaders Fellows (FLF) Development Network and other professional networks. We received **40 complete responses from researchers from 17 disciplines** from across the UK working on projects in different fields (including gender based violence, domestic abuse, child abuse, substance use, mental health, food insecurity and precarity, austerity, climate change, disasters, homelessness, health inequalities, social inequalities, modern slavery, human trafficking, persecution, death, criminal justice, hate crimes) at different stages in their career (including postgraduate, postdoctoral, early-career, mid-career, established) as well as two respondents working in research support (e.g., project managers).



While this study did not seek to be representative of the UK's research community, it does provide a broad picture of the **challenges researchers face across a wide range of disciplines, research fields, and career stages**. In doing so, it also addresses the gaps in knowledge identified in the literature of exploring the issue of conducting emotionally or ethically challenging research across different disciplines and contexts, and with researchers at different points in their career (Fenge et al. [2019](#): 3). Insights collected from this survey are included throughout the toolkit in boxes titled **'Insights from Researchers'**. They are complemented with **'Insights from Practice'** which describe good practice examples from literature and our own experience. The **'Toolbox'** sections provide examples of practical steps, exercises, strategies, and techniques that we hope will be helpful and useful in different contexts.



Drawing on our survey results and existing literature/ resources, in June 2023, we collaborated with the non-governmental organisation [Body and Soul](#), to conduct **four online workshops** for research leaders/managers and junior researchers working at UK research institutions. These workshops provided further evidence of the nature of problems facing research staff, and helped to identify the kinds of practical strategies that would be most helpful in practice.



We have compiled and curated these lessons to develop this toolkit and have engaged broader institutional actors as part of the process. This has included conversations with the Wellcome Trust, UKRI's Equality Diversity and Inclusion team, the FLF Development Network, and relevant institutional representatives at university level to understand how we can build on what funders and institutions are already doing in this space. As part of these broader conversations, we have **mapped the institutional landscape** at our home universities to identify key institutional entry points, stakeholders, and potential agents of change. We have also drawn on the rich expertise of our Advisory Group, to whom we are enormously grateful for their insights, feedback, and support.



## INSIGHTS FROM RESEARCHERS

*"I didn't realise but there was a period where I felt tremendously responsible for deaths and huge pressure to write work up quickly. I also took on a project with government which became enormous and really affected my life for almost four years – it kept getting bigger and I didn't walk away because of guilt for deaths in institutions."*

*"Reading transcripts where violence experiences are recounted or dismissive attitudes towards Violence against Women (VAW) are given has made me quite upset before. I also feel primed to be perhaps excessively cautious and feel like I sometimes overweight the potential danger of experiencing VAW myself in certain situations, e.g., avoiding walking in certain areas for fear of attack. It can also be quite triggering to read other women's accounts as it makes me remember my own abusive relationships. Even dealing with quantitative larger scale data can be hard as it is just depressing to be constantly reminded of the size of the problem."*

*"For the last two years, I have managed the research process quite well. Now that I am coming to the end of my project and am dealing with the stress of finding a job, I haven't been able to focus as much on my wellbeing. I have been working longer hours, which has often led to me dreaming about my work. In the past few days, I have been unable to think about anything but the victims of Nazi persecution. I see them on the Tube and at the store. I have been talking about my work a lot more in therapy as well. Now that I am applying for jobs, I am considering that I may want to step away from research for a while."*

*"Like many, I research a topic relating to experiences in my own life – experiences I thought I had dealt with. However, I found interviews re-traumatising as they surfaced old experiences. I had to re-work through these experiences, and it tripped me up a bit."*

*"The negative aspects can build up and trigger depression (every day dealing with existential environmental crises and trauma of individuals). Sometimes it leads to very bad brain fog and despair (which makes work very hard)."*

# EQUITY AND INCLUSION AND RESEARCHER WELLBEING

**Creating institutional support structures for researchers who are doing emotionally and ethically challenging work and putting in motion a culture of change across the research sector is, at its heart, a matter of equity, inclusion, and social justice.**

We believe that it is critically important to consider how people are differently located in intersecting systems of power and how this can result in certain individuals or groups being at greater risk of stress, burnout, or secondary/vicarious trauma.

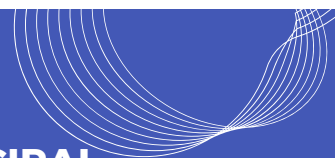
**Marginalised researchers and those from systemically excluded or less privileged groups already navigate additional sites of labour in the academy.** Working towards better researcher wellbeing and mitigating against the risk of secondary trauma should therefore form part of a broader set of actions addressing structural and systemic workplace inequalities and unequal power dynamics.

In addition, the RES-WELL Project has raised the issue of **increasing casualisation of the workforce within the Higher Education sector**, which is skewed towards those in early career stages and impacts groups of staff with different equality characteristics in different ways (UCU [2021](#)). This poses a significant source of stress and pressure for many researchers who are struggling with precarious contracts, low pay, and decreased workplace benefits, which has a direct impact on their mental and physical health (UCU 2019). **These contextual structural drivers including emotional burden, stress, and secondary trauma are at the centre of this toolkit** and our continuing efforts to improve the emotional wellbeing and ensure the emotional safety of **all** researchers within a diversifying academy.



# KEY ENTRY POINT 1

## RESEARCH FUNDING: FUNDERS AND PRINCIPAL INVESTIGATORS



### WHY ARE FUNDERS AND PRINCIPAL INVESTIGATORS IMPORTANT?

The Researcher Development Concordat (2019:1) explicitly recognises that funders are “key stakeholders with shared responsibility for supporting the development and maintenance of healthy research cultures within the institutions they fund and for supporting the professional development of researchers.” The role of funders in the development of formal processes and embedding accompanying supportive infrastructure is increasingly being acknowledged as a central component in preventing researcher trauma (e.g., Dickson-Swift 2022, Hammett et al. 2021, Williamson et al. 2020). Funders have an opportunity to address key root causes of researcher trauma through deploying multiple levers including considering different, more flexible models of funding and formalising a trauma-informed approach to researcher wellbeing and mental health at organisational and system level. This should move away from individual-based solutions towards more sustainable and meaningful change. This must be characterised by being **proactive rather than reactive** in addressing the diverse needs of researchers and adequately resourced.

### WHAT CAN WE DO ABOUT IT?

We suggest **four key strategies** towards this goal: **1) increased attention, 2) address and mitigate impacts, 3) adequate resource support, and 4) maximise flexibility.**

#### 1

#### INCREASED ATTENTION

There should be more opportunities for engagement between funders and Principal Investigators (PIs) working on emotionally or ethically challenging research. These could facilitate the development of **new funding priorities, more flexible models of funding, and grant application processes** to help establish and embed better understandings of how to sustainably address the emotional and ethical challenges faced by researchers. Ideally, this should be complemented by professional psychological advice on the types and levels of support needed to ensure the emotional safety and wellbeing of research teams. This will require a balanced approach towards both **encouraging funding applications that tackle challenging research topics** while also ensuring that **appropriate protection and suitable wellbeing safeguards are in place for the work outlined beyond current ethical considerations.** It is important that this extends beyond funders and disciplines traditionally associated with more emotionally challenging research and cultivates inter- and multi-disciplinary learning and best practice and **actively seeks to include and address the experiences and viewpoints of systemically marginalised researchers.**



## INSIGHTS FROM RESEARCHERS

*"I am concerned that we get the balance right between encouraging challenging research and practicing appropriate protection. Many of the ethical processes draw attention to challenges and dangers without a) drawing attention to the benefits of doing challenging research, b) helping researchers find supportive and meaningful practices that benefit their research and well-being. We need to find a way of identifying challenge as part of doing research not in putting up barriers to it."*

*"Funders love challenging research, but they do not take into consideration the researcher's well-being. Moreover, they expect charities to provide their time for free, which is not ethical at all. They need a better/more human understanding of the type of work that we do and put some support in place."*

### 2

## ADDRESS AND MITIGATE IMPACTS

Funders can and should **support PIs and early career researchers** to adequately consider – and prioritise – the impacts of emotionally or ethically challenging research on themselves and others within their research teams. This could be done as part of **funding guidelines or public briefings** – both of which provide opportunities for discussion about specific measures and strategies to protect researchers from psychological or emotional harms, i.e., by providing regular reflective spaces for teams to discuss the impact of their work, counselling provision, self-care strategies, team safeguards and protocols, appropriate extensions, etc. Funding applications, where appropriate, should include relevant safeguards appropriate to the specific nature of the research. For example, the **inclusion of a mandatory researcher wellbeing section or statement** as part of grant applications, with accompanying guidance issued by the funder. This guidance should be designed collaboratively with the diversifying research community and reflect and proactively address both equity and inclusion concerns. Funders can play an active and leading role in ensuring that such measures are considered as part of the funding application process, helping to establish researcher wellbeing as a priority in practice.

### 3

## ADEQUATE RESOURCE SUPPORT

The costing of grant applications provides a key opportunity for funders to ensure that the safeguarding of researchers has been considered within research across disciplines. Providing **appropriate safeguards often costs both money and staff time**, such as providing psychological support and staff training. Whilst psychological support for staff might be available as part of institutional health and wellbeing services, this is often general, constrained to a handful of sessions, rarely specialised and often poorly equipped to deal with the specific challenges of emotionally or ethically challenging research. Ensuring that time and resources have been

committed to psychological support and wellbeing for researchers acknowledges that adequate safeguarding often goes beyond ensuring good management and broader support structures are often required.

Funders could provide specific guidance for applicants and university research support officers on **how to best cost for measures to support the psychosocial support needs of their teams**, e.g., identifying eligible costs, and **ring fence funds beyond the initial grant to cover costs including training, resources, support services/activities**. Funders should extend these interventions through inclusion of such issues in **guidance for peer reviewers** who are evaluating funding applications and create clarity that the costs of psychosocial support for research staff will in no way negatively impact the decision-making processes. In an ideal world, **research wellbeing costs should be ring-fenced so they form an integral rather than optional part of research costs** so that emotionally or ethically challenging research can be carried out on a level playing field with other research.



## INSIGHTS FROM RESEARCHERS

In our survey we asked, 'Have you ever included / considered including costs and time for mental health support (e.g., mental health promotion, counselling, etc.) into a research grant?' Most of our respondents (85%) answered NO.

*"I didn't know we could do this [include funding for mental health support of research teams]. This is my first big research grant so it would have been helpful if my institution flagged this during the proposal writing stage..."*

*"Budgets are unbelievably tight already. I shouldn't have to choose between having a research team or having mental health support. This should be a separate pot of funds we can apply for."*

*"Because I didn't think of it! But I think it's a crucial part of the application process and funders should have a section on this."*

*"I don't think it would be funded, and I think unconscious bias would mean that the grant would be scored lower."*

## 4

## MAXIMISE FLEXIBILITY

Projects focused on emotionally or ethically challenging research often have **additional staffing needs** as well as a **longer delivery time** and might require a **more flexible model of funding**. Melrose (2002), for example, recommends allowing researchers time for periods away from fieldwork and to do other things such as teach or write to be able to cope with the emotional burden of their research and to gain some psychological distance. **This needs to be factored into funding models**

and through practical measures including **funding applications, budgets, timelines, staffing requests, as well as grant reporting systems and expectations.** Funders and research institutions should acknowledge that **support for researchers and other team members might need to be available beyond official project end dates.** This necessitates ongoing discussion and collaboration between funders and research institutions.



## INSIGHTS FROM RESEARCHERS

In our survey we asked, 'Which areas could funders do differently or better?'

*"Funders could provide a pot of funds to pay for a mental health professional to be part of the team, separate from research funds. Right now there's zero attention to this issue."*

*"I think what could really help is if there were sections of the application forms that ask for a paragraph or two asking the researcher(s) to reflect on the potential emotional impact of the work and how to address this. I think funders should also be flexible in what their funding provides to enable researchers to allocate budget to support activities/resources which will mitigate negative impacts of doing the research. Both for them and for participants/co-researchers. They should also look at their own policies to make sure they are inclusive for emotionally demanding projects (e.g: providing costed extensions when breaks are needed)."*

*"When funding is granted, there should be a requirement for universities to offer open access to counselling - and funders should be asking for this on behalf of successful grant applicants, because as an individual member of staff it is usually impossible to get the right support from the Institution."*

*"Contracts that are more consistent and that allow for a person to rebuild so that they can produce from a place of care and not of desperation."*







## KEY ACTION POINTS FOR FUNDERS

- Engage with researchers doing emotionally or ethically challenging research to better understand and incorporate their needs as part of ongoing conversations embedded within funding allocation processes and grant application procedures;
- Incorporate advice on how to appropriately support and safeguard the mental health and wellbeing of researchers into existing funding guidelines and briefings for applicants and reviewers;
- Provide guidance and support for appropriate budget allocation and/or ring fence funding for support measures and services as part of grant applications;
- Consider more flexible funding models that encourage the consideration of researcher mental health and wellbeing as a rationale for longer than usual timelines and extension requests.

# KEY ENTRY POINT 2

## HIGHER EDUCATION INSTITUTIONS: CODES OF PRACTICE AND RESEARCHER SUPPORT STRUCTURES

### WHY ARE HIGHER EDUCATION INSTITUTIONS IMPORTANT?

The responsibility for researcher mental health and wellbeing goes far beyond the individual researcher or research team and **requires collective action and cross-institutional initiatives** to put relevant structures and safeguards in place. Institutions share a significant portion of responsibility for the safety and protection (including emotional wellbeing and the protection from emotional harms) and **duty of care towards their research staff**.

For those engaged in emotionally or ethically challenging research, institutions may need to **go above and beyond standard support services** and resources provided to research staff. This type of research often comes with additional considerations, which may need **psychosocial support** specialising in both secondary trauma and research to deal with the additional burdens that can arise from indirect contact with challenging topics, such as reading qualitative transcripts or analysing data on the burdens of disease.



Current literature (e.g., Astill [2018](#), Fenge et al. [2019](#), Dickson-Swift [2022](#), Silverio et al. [2022](#), Stahlke [2018](#)) points to a discrepancy between the emphasis and concern put on protecting research participants by research institutions and the relatively smaller time and resources that are often spent on researchers' emotional and psychological safety as well as a **tendency towards prioritising physical harms over emotional harms**. In the majority of institutions represented in our own research, **more could be done to develop, formalise, and implement relevant guidelines, protocols, and support systems**. It is paramount that any support mechanisms are clear in terms of responsibility and therefore accountability (Fenge et al. [2019](#)) and address the needs of a diversifying research community by **proactively engaging with and including researchers from systemically marginalised/excluded groups** and those who are precariously positioned within the academic landscape.

### WHAT CAN WE DO ABOUT IT?

We outline **four key areas** for further development by research institutions: **1) establishing wellbeing protocols; 2) consideration as part of ethical review; 3) establishing peer support networks; and 4) creating strategies and resources for supporting trauma-informed research.**



## INSIGHTS FROM PRACTICE: PAUCITY OF RESOURCES

*"I recently faced a dilemma when a group of masters and doctoral students approached me looking for support as they prepared for field research in a range of conflict-affected countries. These students, from an international policy school, were headed for careers in humanitarianism, diplomacy, peacebuilding, and the academy, and felt ill-equipped to conduct their research projects. They were looking for concrete guidance on how to practice trauma-sensitive interviewing, and how to keep themselves healthy in the face of anticipated emotional hardship. In searching my archives and reviewing university guidance and protocols, I was struck by the paucity of resources available to them as students and to us as researchers working in and around conflict and violence."*

*(Source: Howe 2022: 363-64)*



## INSIGHTS FROM RESEARCHERS

We asked in our survey, 'Have you received any support from your research organisation in relation to your research work on sensitive topics?' Most of our respondents (77%) answered NO. - We then asked our survey respondents, 'What kind of support would you like to see in your research organisation?'

*"Training and activities that acknowledge the challenges and costs of emotionally challenging research, peer support networks or mentorship processes and practices that understand emotional impacts, inclusion of emotional wellbeing as a priority in ethics and risk assessment forms."*

*"Universities need to have more open and flexible policies around access to counselling for researchers who work on sensitive subjects. Being told you can have 6 sessions (or whatever the quota per annum) when a project is so sensitive presents a real risk to researchers - which is not in line with 'duty of care' responsibilities which institutions have."*

*"Funds for therapeutic support for researchers, or even for care activities beyond the obvious counselling. I don't think we can rely on universities' own counselling offerings for this sort of thing."*

*"More acknowledgment of the impact of this kind of research; changes to the ethical review system so that it better supports this kind of research; group supervision."*

*"I would like to see sincere support in terms of openness, an end in precarious nature of work that at many times require a step back to rebuild and refresh without the constant worry of having to constantly produce even in seasons of complete depletion."*

Many research institutions currently **lack standardised protocols to protect researchers and research teams from emotional harms or that clarify key responsibilities or support services.** Such protocols have increasingly been advocated for in the literature (e.g., Dickson-Swift [2022](#), Williamson et al. [2020](#)) because of the important role they play in standardising practice across departments and disciplines. Examples of good institutional practices include: **opportunities for teams to reflect on the impact of their work** and manage emotional and psychological risk as part of team management procedures and training; **signposting to support services** both within and beyond the university (including **facilitating access to specialised research-specific support services** beyond generalised counselling supports); **including emotional wellbeing on meeting agendas** at school, faculty and department-level; inclusion of **emotional wellbeing as a factor within risk assessments and other health and safety requirements for fieldwork and data collection** where appropriate (see below 'Insights from Practice: Researcher Safety Protocol'), and accompanying **guidance and training for researchers, health and safety teams, occupational health, and research support officers.**



### INSIGHTS FROM PRACTICE: RESEARCHER SAFETY PROTOCOL

*"Before conducting any of the qualitative and quantitative research, we put in place a standard researcher safety protocol, submitted to the Research Ethics Committee, which specifically mentioned emotional safety:*

*'Emotional wellbeing: Researchers will be aware that this kind of work can be emotionally demanding. Debriefing: 1) Researchers will plan time after each visit where they can debrief about visit and interviews undertaken. This can be done immediately after the visit, by telephone or in person. Where possible, this should happen within 48h. 2) In regular team meetings, the team will discuss any emotional aspects of the work and address any particular issues which have arisen. Where a member of staff has experienced a difficult situation, s/he will seek support from colleagues. If, after debriefing and further meetings with colleagues, the researcher is still in need of support or if s/he would like to speak to a Counsellor, s/he is free to do this at any point. Work-based counselling services are available by contacting <details provided>.'*

*This was implemented during the project by team members checking-in with each other after interviews, particularly if they were off-site conducting fieldwork. It was also implemented by having an open-door policy for staff if they needed to talk something through, and by the team as a whole, making themselves visible and available to each other. More formally, we also included emotional well-being on the agenda for every team meeting, and used this as an opportunity to raise and share issues across the team. Any key points and actions which emerged from these discussions were noted. The lead researcher made regular contact with the*

transcriber to check-in with them and offer support if it were needed. In practice, team members had a variety of ways of dealing with the emotional impacts of the fieldwork (both interviews and analysis of police data), with some favouring 1:1 and others favouring discussion in team meetings.”

(Source: Williamson et al. [2020](#): 60)

## 2

## ETHICAL REVIEW

Ethics applications and risk assessments can play a key role in highlighting and establishing **protocols to mitigate the emotional risks and harms for researchers** while grounding a sustained institutional commitment to emotional safety and wellbeing of researchers (e.g., Hammett et al. [2021](#), Nikischer [2019](#), Waters et al. [2020](#), Williamson et al. [2020](#)). Our review of institutional practices highlighted the importance of including a **specific section in ethical review applications on how to protect researchers** (and not only research participants) from emotional harms as part of the research process. Good practice in this area includes **considering the potential emotional or psychological harms the research may cause to the research team in a way that does not place the burden of dealing with these risks solely on the researcher**. Ethics reviewers and committees will then require appropriate **training to identify appropriate risk mitigation strategies**. The above ‘Insights from Practice’ gives an example of a standard researcher safety protocol as part of an ethics application which addresses researcher emotional safety.



### INSIGHTS FROM PRACTICE: ETHICAL REVIEW PROCESS

*“I am responsible for reviewing ethics applications for my university. My role is to provide a research lens to the application and consider whether the ethical issues that might arise have been adequately addressed. There are few common errors that we see often, particularly around two questions on the form – one, about what ethical issues there are and how these are being addressed; and two, if there are any ethical considerations to be made for the research team (as opposed to the participants). Most researchers are able to answer the first question and identify some ethical concerns of their project, however, the second question is trickier. Researchers are often expected to be objective in their research, stand outside of the topic itself, and this means that they don’t always recognise how difficult it will be to explore data on seemingly innocuous questions, such as maternal and child health, or poverty. Statistics can be as challenging as people’s stories simply because they show the extent of the problem.”*

(Source: Anonymous researcher at a higher education institution)



## INSIGHTS FROM RESEARCHERS

*“Ethics committees don't understand trauma-informed research.”*

*“I have found that ethics committees are not always well adapted to sensitive research and can act as a block sometimes to meaningful ethical research. For example, the requirement to have very long information sheets - arguably this is not ethical to give participants so much to read and there could be better ways of doing this.”*

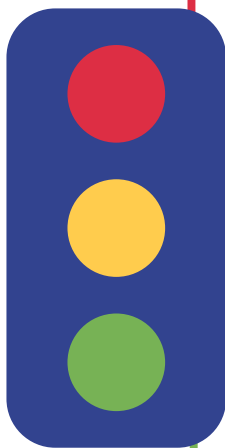
Emotionally or ethically challenging research often makes **researchers think about their research participants and the situations they find themselves in which can have an emotional impact**. For example, the participants may be in a more difficult situation than the researcher or facing more severe challenges. Many times, researchers find themselves quite helpless to support the participants in any concrete way as far as their problems are concerned which can be quite stressful. To help researchers navigate these pressures, it is important to have **mechanisms for risk awareness, management, and signposting as part of their data collection** and are as much as possible **equipped with resources or information so they can signpost participants to relevant support services**.



### TOOLBOX: TRAFFIC LIGHT SYSTEM FOR RISK AWARENESS/MANAGEMENT/SIGNPOSTING



The traffic light tool offers a practical example as a risk mitigation strategy for researchers engaged in emotionally and ethically challenging research. It can be used in risk assessment forms or ethics applications to outline stopping and signposting rules for research participants as part of data collection. It also provides a helpful training tool for data collectors and field researchers.



Urgent help needed. Participant must be signposted to emergency services and followed-up with to ensure help has been received.


Professional help would be useful. Participant should be signposted to relevant services.

Emotional wellbeing is good but researcher should remain vigilant.

## EXAMPLE FROM A STUDY PROTOCOL FOR A SURVEY ON VIOLENCE AGAINST WOMEN AND GIRLS


### HOW PEOPLE ACT DURING SURVEY

### WHAT THE COUNSELLOR/ DATA COLLECTOR SHOULD DO




Disclosure of ongoing exposure to violence/ threats to wellbeing and safety, intention to self-harm/ suicidal ideation.

At the end of the interview, provide the participant with the list of relevant referral options. Talk to the participant about the possibility of stopping the survey if this is what they want to do or taking a break. Offer the option of talking in more depth about the issue to a professional counsellor on the project team. Provide information about other follow up care available through the project (i.e., financial support, safe house and counselling services). Follow up with the participant one week after the survey to see how they are feeling and if they have contacted relevant services.



Participants display sadness (crying) or anger during the interview.

At the end of the interview, provide the participant with the list of relevant referral options. Talk to the participant about the possibility of stopping the survey if this is what they want to do or taking a break. Offer the option of talking in more depth about the issue either now or at a later date.



Participant is comfortable throughout the interview, relaxed and behaving normally.

Continue to observe the participant's behaviour to see if they continue to be okay.

The literature highlights the importance of **communities that listen and offers peer support mechanisms for researchers doing emotionally and ethically challenging work**. Schulz et al. (2022: 1471), for example, note that, “[t]urning to those who share a lived reality with us and crafting and finding groups or networks of peer support can be a particularly helpful collective way of engaging with fieldwork-



related mental health challenges – both during periods of field research and in its wake.” Institutions should be encouraged to **develop a peer support model for emotionally and ethically challenging research across different disciplines and scales**. This could include **dedicated peer support coordinators, training workshops, materials, tools, and guidance** to help local implementation by trained peer supporters who need to have access to appropriate levels of ongoing support and supervision themselves. To maximise effectiveness, **trained peer support networks may need to be linked in with the wider institutional support landscape, services, and intervention programmes** as well as inter-institutional networks for researchers working on emotionally or ethically challenging research.

Peer support networks can further enable the grounding and **sharing of effective practices across disciplines**, allow junior and early career researchers or those otherwise marginalised, to confidentially and safely share and raise concerns, and identify examples of bad or ineffective practice that can be sensitively addressed through the appropriate channels. Peer support, while an important part of a network of support, should not replace other structures such as **good line management and professional wellbeing support**.

**Some examples of peer support networks are:**

➤ **The ‘Challenging Research Network’** is a group of researchers and academics working in complex, emotionally demanding, and politically charged research territories across the humanities and social sciences and all career stages. By providing a safe, confidential, and welcoming online space, the initiative aims to be a source of support and organises regular meetings to discuss the complex methodological and ethical issues members face in their work.

➤ **The ‘Emotionally Demanding Research Network’** is a peer support network for researchers conducting, supporting or studying emotionally demanding research (including students, research support staff, and practitioners involved in research). The network holds monthly peer support meetings and hosts a



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private discussion forum for those based in, or conducting research in, Scotland. Less frequently, the network also holds online seminars and workshops open to colleagues outside of Scotland.



The **'Researcher Resilience Community of Practice'** is an online collaboration platform with the aim of providing a space and virtual meetings for graduate students and Early Career Researchers conducting research on sensitive topics to come together in the shared interest of promoting and prioritizing emotional wellbeing.

## 4

## TRAUMA-INFORMED CULTURE AND PRACTICE

The implementation of a trauma-informed culture and practice through developing strategies and resources would support the emotional wellbeing and resilience of researchers across the institution. **Being trauma-informed** means “being able to recognise when someone may be affected by trauma, collaboratively adjusting how we work to take this into account and responding in a way that supports recovery, does no harm and recognises and supports people's resilience” ([NHS Education for Scotland](#)). **Key entry points for establishing a trauma-informed research culture** at universities include: research ethics committees, equality, diversity and inclusion steering groups and staff equalities networks, doctoral schools and PhD networks, early career support networks, workplace health and wellbeing/occupational health services, departmental activities and practices. A trauma-informed research culture should be **embedded as early as possible**, by **building researcher wellbeing into undergraduate, as well as postgraduate, curricula on research methods, research integrity and ethics**.

To bring about a change in institutional culture, **interventions need to be supported by relevant training and skills development which needs to be adequately resourced and included in regular working hours and part of continuous professional development**. Good practice further includes identifying institutional 'trauma informed champions' who can lead on driving wider institutional change and who are trained specifically to act as educator, trainer, mentor, coach and advocate for a trauma-informed organisational change. “Trauma-informed organisational change involves many moving parts. Having someone whose job is dedicated to coordinating, tracking, and facilitating many of these components can help ensure consistency and overall sustainability” (ITTIC 2022: 55). [Here](#) is an example of an organisational emotional wellbeing policy that explicitly addresses additional pressures of doing emotionally or ethically challenging research (Riddell 2023).

Institutions should develop **specific tools to allow them to identify the level of risk and respond appropriately to reduce any harm**, e.g., through structured interview training for occupational health services (see for example the [National Police Wellbeing Service](#)); and **training and guidance for supervisors, line managers, mentors, university wellbeing teams** (Dickson-Swift 2022, Fenge et al. 2019, Nikischer 2019, Waters et al. 2020). If there are no institutional specific training opportunities yet,

the [National Trauma Training Programme \(NTTP\)](#) from NHS Education for Scotland provides resources for people whose role involves working alongside or serving people who may be affected by trauma designed to develop their knowledge and skills to support their trauma-skilled practice, i.e., increase understanding of what psychological trauma is and how it can affect people, how to support recovery and develop trauma-informed relationships that incorporate trust, safety, choice and collaboration, and control and empowerment, and how to recognise when a person may benefit from a trauma specialist intervention (for more guidance see the [NTTP e-learning modules](#) which are free to access, registration required).

**Enabling a trauma-informed practice also includes skills development among researchers** through running researcher training on conducting ‘challenging’ research and developing suitable training modules for different career stages and contexts, including **graduate, postgraduate and undergraduate training**, to increase researcher preparedness (Dickson-Swift [2022](#), Fenge et al. [2019](#), Nikischer [2019](#), Waters et al. [2020](#)). Waters et al. ([2020](#): 9) recommend the following areas for training: acknowledging and performing emotional labour, understanding how emotions are used in research, planning emotional wellbeing into research projects, the acknowledgement and mechanisms of self-care, and asking for help and accessing support. Again, this skills development needs to be adequately resourced and included in regular working hours and expected as part of continuous professional development or doctoral training. If there are no appropriate training opportunities available at the institution, it is possible to enrol in online modules, such as the [SVRI ‘Dare to Care’](#) course (<https://svri.thinkific.com/courses/dare-to-care>) about understanding stress, burnout, vicarious trauma, wellness, resilience, self and collective care or the [CONVERGE Conducting Emotionally Challenging Research](#) training (<https://converge.colorado.edu/resources/training-modules/>) from the Natural Hazards Center at the University of Colorado Boulder. Both are free to access but registration is required.

For a trauma-informed research practice to be sustainably developed and enabled, a **change in practices both at the level of the institution and individual researchers at all career stages** is required. Institutions and researchers should proactively work together for improved and adequately resourced researcher support across the institution. In this way, it will be possible to work towards **collectively building a more caring institution** (see Toolbox on page 26 and diagram on page 27).





## INSIGHTS FROM PRACTICE: INADEQUATE SUPPORT MECHANISMS

*“Eighteen months into my first professional academic role post-PhD, I was diagnosed with PTSD. This diagnosis was directly attributed to my work as a researcher, in which I had undertaken dozens of interviews with survivors of sexual abuse, and then analysed and coded these same interviews. Twelve months into my role, I began to experience what I later realised were symptoms of PTSD. After raising my concerns with the senior leaders of the research project, I contacted the university’s human resources (HR) department. I was advised to book an appointment with the external employee assistance program—a limited number of these appointments are provided free of charge to university employees every 12 months. I attended two of these interviews with the psychologist provided by this service; however, I was advised by this psychologist that they could not provide me with the care needed for someone experiencing trauma received due to research. Furthermore, the psychologist also outlined that I would need ongoing care. [...] Finally, I secured an appointment with a clinical psychologist experienced in treating vicarious and complex trauma, and was eventually diagnosed with posttraumatic stress disorder (PTSD). The subsequent appointments with my clinical psychologist would eventually span more than 12 months—resulting in a significant amount of money spent addressing my PTSD. Had I not independently sought external psychological support, my diagnosis of PTSD could well have been missed. Following my formal diagnosis, I took steps to adjust and regulate my workload, in line with advice provided from my clinical psychologist. Initially, this advice took the form of a letter sent from my psychologist to the senior leaders of the research project, and the university’s HR department. The letter outlined a number of steps that could be taken to help adjust my workload, including ensuring I only coded a maximum of two interviews per day, took regular breaks from my work, and organised additional debriefing support. In attempting to readjust my workload, the university implemented a return to work plan for me. These plans are often built for those who have sustained a physical injury in the course of their work. In my case, I completed an initial incident report form that requested me to answer questions such as “what part of the body was the most affected?”, and the “location of the incident”; in my case, I had to resort to stating that the incident had taken place “at my desk”. Needless to say, this approach is inappropriate when the injury is not singular or discrete, but instead both cumulative, and concerning a person’s mental health. In the space of three months, very little had shifted in terms of my mental health. I was receiving ongoing care from my own psychologist, but was continuing to experience symptoms of PTSD.”*

*(Source: Gleeson [2022](#))*



## TOOLBOX: STEPS TOWARDS A TRAUMA-INFORMED RESEARCH INSTITUTION



1

Advocate for the inclusion of researcher trauma in university research ethics applications including recognition of the possible causes related to the researcher's emotion and wellbeing.

2

As individual researchers practice an "ethics of self-care" where possible and agitate for its inclusion in university research culture.

3

Avoid denigrating or downplaying the importance of your own emotions or those of others.

4

Include research training for academics and students on dealing with the implications of researching traumatic content and places, including raising awareness of university counselling service, stress management techniques and tools and, including notes and evaluations of "emotions and affect" in field diaries and conversations with supervisors and colleagues.

5

Adopt a better research management toolkit that includes: time budgeted into research projects for discussions on the impacts of their work with co-researchers and/or participants; inclusion of counselling services into budget particularly where research is known to be in traumatic places or with traumatic content; provision of time budgeted for researchers to come together post-project (even when a project has been completed) to retrospectively discuss the research; a move toward longer delivery times for research deliverables on trauma sensitive projects.

*(Source: Dickson-Swift 2022: 478)*

## CULTIVATING A MORE CARING AND SUPPORTIVE INSTITUTION

Considering change factors at the individual, as well as the systemic levels, the diagram suggests four key domains to work on in order to cultivate a more caring, supportive, and trauma-informed institutional culture that is conducive to the mental health and wellbeing of staff working on emotionally or ethically challenging research:



### INDIVIDUAL CONSCIOUSNESS AND CAPABILITIES

- Supporting staff members to understand the signs of vicarious trauma in themselves and others
- Providing regular training and spaces to discuss the impacts of emotionally and ethically challenging research and wellbeing
- Practice self-care



### RESOURCES

- Allocate time and budgets for staff to practise self and collective care
- Allocate time and budgets for staff to take up appropriate and relevant training opportunities



### SOCIAL NORMS AND 'DEEP STRUCTURES' IN THE ORGANISATION

- Build capacity to deal with interpersonal conflict respectfully
- Board and managers place a high value on emotional wellbeing of staff
- Leaders role model in ways that normalise the inclusion of discussions of emotions and affect in research as well as self- and collective-care behaviours and acknowledge emotional labour



### POLICIES AND PROCEDURES

- Development and implementation of an organisational emotional wellbeing policy that explicitly addresses additional pressures of doing emotionally or ethically challenging research
- Integrating a focus on emotional wellbeing including mitigating against the risks of vicarious trauma and collective care into other organisational policies, risk management and ethical review processes
- Develop and implement procedures for trauma-aware workflows

*(Source: Adapted from Billing et al. 2021)*



## KEY ACTION POINTS FOR INSTITUTIONS

- Bring cross-institutional stakeholders together to consider researcher wellbeing in order to develop, formalise, and implement guidelines, safety protocols, and an embedded support system on researcher wellbeing, including the appointment of institutional 'trauma informed champions';
- Ensure that ethical review processes and risk assessments support high quality and ethical research on sensitive topics by ensuring appropriate wellbeing mitigation strategies are in place for the research being proposed;
- Ensure that occupational health and institutional counselling support services are sufficiently trained, resourced and skilled to handle the specific needs of researchers working on emotionally challenging research, which may require specialised service beyond those available to students or other staff;
- Identify existing, and invest in the development of new, peer support networks within and across institutions;
- Enable a well-resourced trauma-informed practice across the institution, identify key entry-points, and implement a suitable multi-pronged training strategy to achieve this and to cultivate a more caring institution;
- A real commitment to equity and social justice in all actions centred around considerations of the varied requirements and needs of a diversifying academy and community of researchers and staff, proactively work towards mitigating against existing structural biases and the often increased and unequal burdens that systemically marginalised researchers find themselves confronted with.

# KEY ENTRY POINT 3

## SUPERVISION AND LINE MANAGEMENT: JUNIOR STAFF INCLUDING EARLY CAREER RESEARCHERS AND PHDS SUPERVISED BY MORE SENIOR RESEARCHERS

### WHY ARE SENIOR STAFF, INCLUDING SUPERVISORS AND LINE-MANAGERS, IMPORTANT?

Senior research staff in leadership positions, line-managers, mentors, and supervisors are key to prioritise researcher wellbeing. They play an important role in trauma-management and **promoting an institutional culture that helps to prevent secondary trauma to occur**, and to enhance trauma-sensitive and trauma-informed working practices and relationships. They can also be important **role models** of self- and collective-care behaviours which often have a positive impact on more junior staff, and cultivating an environment where researcher wellbeing and issues of emotionally and challenging research can be openly discussed. This includes **allocating resources towards self- and collective care**, and for **managing the distribution of power in a way that allows for more equitable organisations, relationships, and working conditions** for all staff (Billing et al. 2021, see also diagram 'Cultivating a More Caring and Supportive Institution' on page 27).

Much of the literature on the emotional burden and costs of research and researcher secondary trauma highlights the **increased vulnerability of those in junior positions**, such as doctoral candidates, post docs, and early career researchers (e.g., Astill 2018, Eliasson and DeHart 2022, Fenge et al. 2019, Gleeson 2022, Waters et al. 2020) who often are in precarious positions and feel inhibited to speak up and get appropriate support within the higher education landscape (Jasim et al. 2021). Those in fixed-term and casual positions need particular attention if they are to be successfully and effectively supported and protected (Gleeson 2022) which is even more pertinent for researchers from marginalised and systemically excluded groups in the academy, particularly if they research topics that have personal relevance (Kinitz 2022).

### WHAT CAN WE DO ABOUT IT?

We suggest **four key strategies** for the attention of those in senior and leadership positions: **1) training in mental health awareness, 2) upskilling, 3) sensitive hiring practices**, and **4) appropriate workload management**.

#### 1

#### RESPONSIBILITIES

Supervisors, mentors, and line-managers will be better able to support the mental health and wellbeing of staff and students when they have **adequate mental health awareness** and adopt a **sensitive, yet proactive supervision/mentoring/line-managing strategy** to identify whether research staff and students are at risk of developing secondary trauma. The **use of sensitive questioning** can: (i) help

determine why staff and students are interested in the specific research area/topic, (ii) whether they have ever been impacted by what they are researching, (iii) whether they are themselves aware of the potential impact of the research on their mental health and emotional wellbeing. For this to be possible and for the supervisory/mentoring/line-managing process in general to be conducive to emotional support, **a positive and safe relationship and environment are key**. Within these relationships, there needs to be an engagement about **what supports may be needed** (e.g., training, counselling) and resources need to be available to address identified needs which works towards the building of a more caring institution (see also diagram 'Cultivating a More Caring and Supportive Institution' in previous chapter). There needs to be an awareness on the part of those in senior positions that **less privileged and marginalised junior staff and those from systemically excluded groups are often already confronted with additional burdens** and are navigating additional sites of labour in the higher educational landscape. The emotional impact of the research work and the development of strategies that mitigate the risk of secondary trauma and can aid the adoption and practice of self-care should be addressed within supervisory/mentoring/line-managing relationships and **individual professional development plans** as well as promotion processes so that they become "part of the everyday scholarly work, not an add-on after trauma has occurred" (Eliasson and DeHart 2022: 492). These should form a key part of **supervisor, mentor, line-manager training, guidance and reporting** and should be included in ongoing mandatory and optional professional development opportunities and resources (see also 'upskilling' below) as well as professional recognition, such as the [UKCGE Research Supervision Recognition Programme](#) or the [Advance HE Fellowship](#). There is good evidence supporting the training of line managers in mental health awareness (see Stevenson and Farmer 2017).

Supervisors and research leaders have **responsibilities to the researchers** whom they manage and play a relevant part in **talking to staff about the emotional impacts of their work and other academic activities** including conference attendance, peer-reviewing, marking, and supervising undergraduate and postgraduate students working on emotionally challenging topics. If it is not possible to provide appropriate and timely discussion, they should actively seek an alternate arrangement for the researcher.



### INSIGHTS FROM PRACTICE

*"Being an international student from a minority ethnic background was something I was always aware of. Sometimes it can be hard for people like me to voice our concerns about our own mental health and wellbeing because we do not want to be judged as "lazy" or "making excuses for not wanting to do the work". I was lucky with my supervisors, in that I did feel comfortable talking to them but not everyone may be in a position to do so. I think it is important for supervisors to have conversations where they ask about student's mental health and well-being, how they are feeling, and they are welcome to talk about this during supervision meetings, without feeling like they are taking up supervisors'*



time, that is allotted for academic discussions. This is especially important during fieldwork when researchers are often meeting and listening to distressing stories from participants, unable to help them, and feeling a complex mix of emotions. While the kindness of supervisors or more senior academics go a long way in making students/junior researchers/researcher from marginalized backgrounds feel comfortable, the inherent power differential in these relationships still makes it difficult to speak completely honestly. I think therefore it might be helpful if there are peer support networks where junior or marginalized researchers can self-identify and join. It might even be helpful if universities have a website with an anonymous chat function or message board where everyone can post anonymously about their experiences, should they feel like it. Sometimes it helps just to be able to speak out loud about what you are feeling and it helps even more to see that others are going through similar experiences without having to worry about being “exposed to judgement”.

(Source: Post-doctoral researcher)



## TOOLBOX: ADVICE FOR DOCTORAL SUPERVISION



### How can researchers use supervision for support?

Supervisors and researchers should work together to:

- Recognise and discuss secondary trauma as an ongoing issue throughout the project (including post fieldwork e.g., during transcribing interviews and analysis)
- Understand and acknowledge that fieldwork can be a very emotionally demanding time and that secondary trauma is a natural reaction to being exposed to human distress.
- Acknowledge and explore the possibility that researchers may have parallels with their chosen field of study in their own family or social history, or may have suffered a previous traumatic experience themselves, making them more susceptible to being affected.
- Go through in detail the resources and support systems available both at the university and more broadly. This should be done at the outset:

### Before fieldwork

- Discuss what issues might be faced and identify the potential for secondary trauma.
- Supervisors can encourage students to raise their own awareness of secondary trauma, and to identify resources and sources of support and attend to self-care measures.
- Include serious and detailed consideration of secondary trauma, sources of support and self-care measures in the risk assessment and ethics forms.
- Consider as valuable preparation attendance at a secondary trauma workshop at the university if available or an online workshop, or a session with the student/ staff counselling service.





### **While researchers are away:**

- Keep in regular contact and make active checks on their students' welfare and wellbeing, as well as their academic progress.
- Encourage students to take breaks and look after themselves and their emotional wellbeing, including engaging in other areas of life that are not to do with their work.
- Ensure that there is some kind of accessible support for the student in the field.
- Encourage them to keep in regular contact with loved ones through online media/telephone. Remind students of the facility for online counselling if available.
- Reassure them that they are more important than their research.



### **If there is a crisis while a researcher is away:**

- They should not be alone. Make sure the researcher has someone reliable with them; if you are concerned that they are alone help them identify people they can go to in the field (co-researcher, colleague, housemate, NGO worker, etc.).
- Make sure they are in contact with supportive friends or family back home.
- Contact the University's Student Counselling Service (or University Occupational Health Unit for staff) for advice if you are unsure what to do, taking care to maintain the researcher's confidentiality.
- Depending on the severity, you may need to urge them to seek medical help (the insurance emergency provider should be able to help identify a suitable professional).



### **On return from fieldwork:**

- Provide time and space to talk through the emotional aspects of the fieldwork. Check out researchers' wellbeing and state of mind.
- Enquire proactively about how the researcher is coping with the emotional demands of writing up the research and in particular transcribing interviews\*
- Make recommendations to seek further support where appropriate.
- Pass on any lessons learned to others that might benefit.

*\*For many researchers, the greatest period of emotional vulnerability comes at a later stage, during the process of transcribing interviews. If a researcher seems to be procrastinating with interview transcription or is less motivated/productive than normal, consider the possibility of vicarious trauma and discuss this directly with them.*

*(Source: Adapted from Oxford University Social Sciences Division [2016](#))*



## TOOLBOX: CONDUCTING GROUP DEBRIEFING SESSIONS



The Sexual Violence Research Initiative (SVRI) provides guidance on group debriefing sessions whilst noting that one-off individual debriefing sessions can be potentially ineffective, harmful, and re-traumatising. They stress the importance of sessions (i) to be carried out sensitively and (ii) to be embedded within an overall workplace support system that provides opportunities for education, social support and referral to more formal therapy if required.

### 7 PHASES FOR A GROUP DEBRIEFING SESSION

- 1 Introductions** Facilitator introduces the session, aims, rules e.g. this is an opportunity to talk about the stresses of working in this field; you do not need to talk, everyone has different experiences – this is an opportunity to listen, share experiences and not to be critical; respect others; and everything is confidential.
- 2 Fact Phase** Each participant in turn describes an emotionally challenging or traumatic event related to their research. e.g. tell me who you are, your role in the research and just what you saw/heard take place.
- 3 Thought Phase** Each participant shares their cognitive reactions to the event e.g. what were your first thoughts in response to the event?
- 4 Reaction Phase** Each participant expresses their feelings about the event. E.g. What was the worst part of the experience for you personally? How did you feel then? How do you feel now?
- 5 Symptom Phase** This phase provides opportunity to identify any possible physical or psychological symptoms participants may be experiencing. E.g. what physical or psychological experiences have you noticed, if any, as a result of this incident.
- 6 Teaching Phase** In this phase the facilitator tries to normalise the participants' stress reactions and provides tips for management of these reactions.
- 7 Re-entry Phase** The facilitator summarises what has been covered in the session, answers any questions and assesses if any participant needs follow-up or a referral. In this phase it is important to provide information on referral services.

(Source: SVRI 2010)

**Senior research staff** may need to seek out suitable training opportunities to acquire the skills of **mental health awareness**, which might be an important prerequisite to training in **how to recognise and respond to trauma and support the emotional safety of their teams**. The development of such skills should be included in continuous professional development opportunities and resources and form part of professional development frameworks and pathways, such as the [Vitae Researcher Development Framework](#). Having these skills and using them will also help ensure that more junior staff, as well as research assistants, transcribers, translators, and interviewers feel comfortable raising concerns or conducting reflective discussions together. If there are no institution-specific training opportunities available yet, staff could be encouraged to enrol in the [NTTP e-learning modules](#) (see also previous chapter) as a first step towards being trauma-informed and developing their trauma-skilled practice. Senior research staff also need to be able to **signpost to appropriate institutional services** that can provide further support if needed or other local or online counselling services that can provide suitable support to researchers engaged in emotionally or ethically challenging research if university welfare teams are unable to provide this. Having a skilled supervisor or line manager should not be a matter of luck.

It is important for **junior staff to have access to a person who they feel comfortable to talk with** so that their emotional safety can be appropriately supported, as in the peer support structures mentioned in the previous section. Junior staff should be encouraged to raise this need with their line managers without having to fear that they might be judged as incompetent, difficult, or not up for the job. **Mentoring** can be an effective solution in this space.

In addition, supervisors and research leaders need to **ensure that researchers become aware of the emotional difficulties and challenges they might find themselves confronted with** whilst carrying out the research. They therefore have a **duty of care** to make sure that those working on the research (including **interviewers, transcribers, translators, research assistants**) possess the necessary skills and have access to appropriate training to undertake the research (Dickson-Swift et al. 2008: 141). The [SVRI 'Dare to Care'](#) online course about understanding stress, burnout, vicarious trauma, wellness, resilience, self and collective care can be a good starting point both for senior and junior staff to get appropriate training and become equipped in cultivating a more caring and supportive institution. There is also the possibility for researchers to enrol in the [CONVERGE Conducting Emotionally Challenging Research](#) online training module from the Natural Hazards Center at the University of Colorado Boulder. Both these online courses are free to access but registration is required.



## INSIGHTS FROM RESEARCHERS

*“My PhD research was (in hindsight) incredibly traumatic, and I had no training or support at all to either manage or mitigate against this from my institution or my supervisors. Looking back, I should never have been alone in the field doing the research I was – it was an enormous absence in the duty of care. This heavily influenced the research process and what happened next with the data in ways I could not recognise at the time. One result was that I barely published from my PhD data, despite how rich this body of work was, because I could not revisit it. This led to feelings of failure and that I let down my research participants.”*

*“It would be valuable to have had training which allowed me to expect these emotional reactions, and not to feel like a failure when they triggered me. I realise I have been extremely fortunate to have a manager who was prepared and skilled at managing my response, but that was luck. A less skilled manager would have left me adrift. The managers themselves need the training too, if only to signpost adequately.”*

*“I think supervision is a risky process. It can be challenging to speak freely with somebody who has direct control of your career progression. It can take time to work through stuff and supervisors may not have the time or skill to be supportive without being directive.”*

*“Often as a RA I'm not warned of sensitive topics – particularly if transcribing interviews or working with quantitative data (people forget the impact that understanding the scale of an issue or the impact on people (e.g. number of suicide attempts) that it can have).”*



## TOOLBOX: SUPPORTING EMOTIONAL SAFETY



1

Research supervisors should discuss the boundaries that lie between the researcher and participants and strategies for how these might be maintained while establishing rapport and trust.

2

Research supervision should regularly include reviewing the emotional impact of the research process on the researcher through both discussion and review of field notes.

3

Supervisors should proactively arrange emotional support for researchers from a suitably qualified professional who understands the nature of the research. Time and space to talk through the emotional aspects of the work should be provided regularly; this should take place from the start of the project, rather than in response to an incident or event. To promote honest communication and uphold privacy, this person should not be a member of the research team and may require additional structural support from the university to ensure equality in access.

4

Researchers should be encouraged to regularly practice mindfulness and engage in emotional auditing via memos or research diaries after each interview and when reviewing recordings and transcripts.

5

Research supervisors should emphasise the need for a healthy work-life balance and to create clear boundaries around their research and between home and work. Having a balanced lifestyle reduces the risk of burnout.

6

Research supervisors should support the researcher to briefly “step away” from the intensity of the research process as an appropriate response to promoting emotional safety when major challenges arise.

7

Departmental meetings should encourage discussion of the emotional impact and the challenging moments of research.

*(Source: Adapted from Dickson-Swift [2022](#): 479)*



## TOOLBOX: SUPPORTING THE EMOTIONAL SAFETY OF TRANSCRIBERS



Transcribers can also be impacted by the work they do and be emotionally vulnerable and need to be fully prepared for the work they do. They should:

- ✓ Be included in the ethics process.
- ✓ Be encouraged to have a process for self-care.
- ✓ Be fully informed of the nature of research and type of data.
- ✓ Be alerted prior to the transcription of potentially “challenging” or “difficult” interviews.
- ✓ Have regular scheduled sessions to talk about emotional impacts of the work.
- ✓ Have prompt access to an appropriate person for crisis counselling.
- ✓ Have a clearly documented process for close of contract or project after transcription is completed that includes a resolution of personal issues that may have arisen as a consequence of the work.
- ✓ Be encouraged to journal thoughts and feelings which may then become a part of the fieldwork notes in some studies.

(Source: Dickson-Swift [2022](#): 479)

### 3

## SENSITIVE HIRING

People who work in emotionally challenging research may have chosen to do so because of past experiences, and this should be acknowledged in hiring practices. We all have a **duty to ensure that the people we hire know what supports are available to help them to avoid vicarious trauma in the workplace.** However, an interview is not the place to have a conversation with someone about past traumas or abuse, and if this does arise, it is the responsibility of the interviewer to be able to handle this disclosure in a sensitive and appropriate manner.

In addition, Kinitz ([2022](#): 1635) raises the point that, “[i]n response to decades-long exclusionary practices, academic institutions are now recruiting early career researchers (ECRs) from systemically marginalized populations who specialize in equity-related research. As a result, these ECRs are likely to conduct research within their communities on topics that have personal relevance—**insider research.**” As

higher education institutions are likely to benefit greatly from the labour of these **insider researchers** (e.g., through increased funding, meeting EDI requirements, easier community engagement), it is crucial to acknowledge from the outset that **these researchers often have particularly burdensome and emotionally demanding** experiences as they are carrying out their research. These experiences and needs must be proactively met with necessary and appropriate methodological training for insider research as well as adequate institutional supports and resources; due to their marginalised and less privileged positions, these researchers might not be able to advocate for support when required (Kinitz [2022](#)). These wider dynamics need to be already on the radar of those in leadership and more senior positions during hiring and onboarding processes.



### TOOLBOX: WORKING WITH SURVIVORS OF VIOLENCE



Researchers who study emotionally demanding topics such as trauma and violence may themselves have been directly affected or traumatized in similar ways in their own lives. A few researchers have bravely shared how their own personal experience of trauma has motivated them to study the same topic in their research (Lee [2017](#); Aroussi [2020](#)). While such research can be challenging, it is also considered important and transformative for those who choose to do so. Limited research and discussion on this topic and limited disclosure of personal experiences can be driven by multiple factors including fear of stigma, lack of care infrastructure in academic institutions, lack of skills among professionals on responding to disclosure of trauma, and fear of retaliation that excludes them from the research itself.

It is important for institutions to be aware and acknowledge the possibility of researchers being personally affected by trauma related to their research. They can take active steps to create an environment of support and care and invest in building trauma-informed mentoring among supervisors and more generally among their staff members. This also includes ensuring that disclosure of personal experiences of trauma does not lead to exclusion of researchers from the study or any other form of penalty. It involves creating space for such researchers to feel comfortable to seek support and have adequate support available during the course of the research. This can help with ensuring the risk of re-traumatization is minimised and the journey of research is personally fulfilling and empowering for the researcher.

*(Source: Tvisha Nevatia, Raising Voices)*



Working towards a trauma-informed workload allocation can be an important step and strategy to support researchers who are doing emotionally challenging work. It is important to recognise that **organisational dynamics and workload allocations may be racialised, gendered, or subject to other forms of power relations** which will need to be taken into consideration to provide all staff with the relevant and necessary support and ensure their emotional safety. Developing and implementing **procedures for trauma-informed workflows** contributes to the cultivation of a more caring institution (Billing et al. [2021](#): 23, see also diagram ‘Cultivating a More Caring and Supportive Institution’ in previous chapter). In order to reduce exposure to traumatic content during their work, researchers should be able to have a **flexible schedule**, have **breaks at key stages during the research cycle**, e.g., during field work, transcription, data analysis, writing up, or step away if they find it difficult to carry out their work at certain points in time (Billing et al. [2021](#)). A trauma-informed workload management also necessitates attention to **preparatory work** so that researchers are knowledgeable about the kinds of information they should provide to research participants, even though this may be limited for researchers in comparison to other professions. At a minimum, this may **help mitigate researchers feeling unable to do anything or being helpless**, as a strategy to reduce the risk of secondary trauma and further help alleviate potential distress (SVRI [2015](#)).



### KEY ACTION POINTS FOR SENIOR STAFF, LINE-MANAGERS, SUPERVISORS

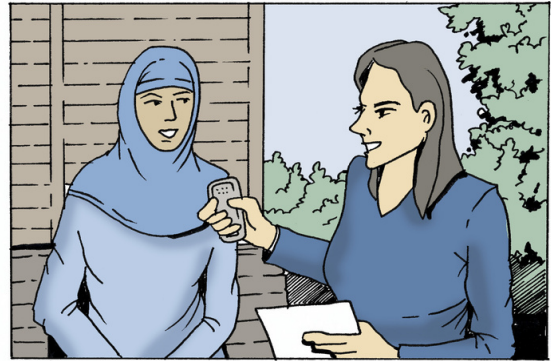
- Develop trauma-informed and skilled supervisory, line-managing, mentoring practices and procedures that cumulatively build a more caring institution.
- Create safe spaces and adopt strategies such as reflective spaces for teams to discuss the impacts of their work in sessions that foster wellbeing and collective care.
- Proactively work towards protecting and supporting the emotional safety of junior staff and research teams: both in practice and in advocating for institutional change.
- Be attentive to trauma within sensitive hiring practices.
- Work towards trauma-informed and caring organisational structures, workflows, and workload allocations.



# SUPPORT FOR RESEARCHERS

In this section we focus on offering a **toolbox of strategies for supporting your emotional wellbeing** as a researcher. They do not seek to present a one-size-fits-all approach, but to offer different tools and approaches that could be used to support yourself or be adapted for those who work in your teams. Alongside the improvements of organisational requirements and institutional practices to better support researchers doing emotionally and ethically challenging work, we see these individual approaches as **stepping stones that researchers can take towards building and maintaining reflexivity and resilience in order to increase their preparedness** (Fenge et al. 2019: 4) **for challenges throughout the research cycle.**

Working in academia can be an emotional experience. **From conducting fieldwork in difficult settings to working with sensitive and difficult data about people's lives, researchers can often feel the emotional impacts of their work.** This can be helpful and drive our research, teaching and practice further into new areas of exploration, but it can also be harmful when we don't recognise our limits or have the necessary support in place. The emotional impacts of our research can generate a **wide variety of symptoms of distress and effects**, e.g., emotional, behavioural, physical, cognitive, spiritual, interpersonal. In the worst cases, this can lead researchers to experience **vicarious or secondary trauma** which can affect us in five ways: esteem, trust, control, intimacy, and safety (Mc Cann and Pearlmann 1990, cited in SVRI 2010). However, it is also important to recognise that the experience of conducting emotionally challenging research can also be destabilising and impact our everyday lives. It



is important to understand and be aware of such effects and try to equip ourselves with the skills and strategies needed to recognise signs of concern/ care for ourselves and others. It is critical to help cope with emotional distress in the immediate as well as to mitigate against the risk of vicarious trauma in the long term, and to collectively work towards a more trauma-informed research practice in our institutions.

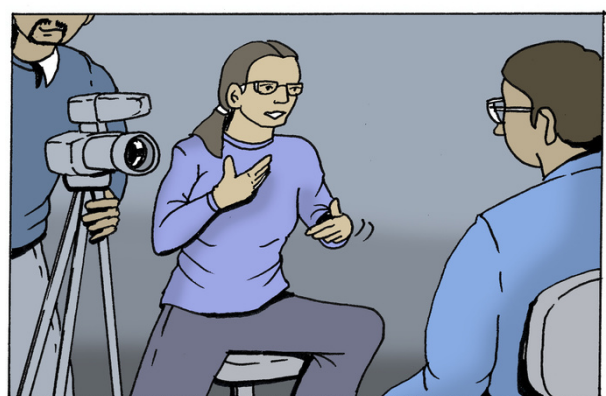
We outline **four key areas** for researchers to pay attention to: **1) recognising signs in themselves and others, 2) manage and reduce the risks of secondary trauma and a more trauma informed research practice, 3) develop reflexive stance, and 4) employ coping strategies and grounding techniques.**

## 1 RECOGNISING SIGNS

There are some **key impacts of conducting the research** and **signs that researchers should look out for in themselves and others**, including:

- Experiencing lingering feelings of anger, rage and sadness about research participants' experiences;
- Feeling helpless and unable to intervene and do anything to alleviate participants' distress;
- Becoming overly emotionally involved with research participants;
- Experiencing bystander guilt, shame, feelings of self-doubt;
- Being preoccupied with thoughts of research participants outside of the work situation;
- Over identification with participants (having horror and rescue fantasies);
- Loss of hope, pessimism, cynicism;
- Distancing, numbing, detachment, staying busy, avoidance;
- Depression, isolation, tiredness;
- Withdrawing from social activities, emotional disconnection from family and friends;
- Loss of motivation and productivity, procrastination;
- Difficulty in maintaining boundaries in your relationships;
- Physical problems, discomfort, weariness, aches, pains, sleeplessness, nausea, vomiting;
- Difficulty in managing emotions, fear, solitude, despair, stress, anxiety, melancholy.

*(Source: Adapted from BMA [2022](#), Dickson-Swift et al. [2007](#), Pineda et al. [2022](#), Williamson et al. [2020](#))*





## INSIGHTS FROM RESEARCHERS

*"I experienced immediate challenges while listening to difficult life stories and testimonies about experiences of violence and conflict – this involved my own emotional response, but also feelings of helplessness and hopelessness about the situations so many of my research participants were facing, frustration at structural injustices exacerbating their struggles, and managing the complex expectations many participants in difficult situations had of me (financial assistance, having political influence, had more power to effect change than I realistically had) – this also fuelled impacts on my emotional state and wellbeing."*

*"During the data collection it was difficult to listen to the stories knowing you could not really help the participants (some of them were expecting you to). During transcription/analysis it was like you were revisiting the violence, sort of like a re-exposure. For data that I had not collected personally, analysing data was the first exposure and could be quite traumatic as well which impacted my personal time (like it affected me mentally after I was done with work and was going about my day)."*

*"Conducting interviews that covered difficult topics often left me feeling distressed but also a sense of anger at what I perceived to be a sense of injustice (being experienced by participants) – the scale of the challenges they faced often left me feeling quite helpless and also made me question my research. While I felt like existing training/literature recognises somewhat that interviews can pose an emotional toll, I think there is much less recognition that this sort of toll can continue through the process of transcription (re-listening to the accounts over and over!!) and analysis."*



## INSIGHTS FROM PRACTICE: IMPACTS OF CHALLENGING RESEARCH

*"The present article emerges directly out of fieldwork I did in San Salvador, El Salvador in 2018 as part of my PhD on how fear and trauma manifest and become defining characteristics of chronically violent urban landscapes. The people I met, the stories they shared, and the ordinary and extraordinary realities of living amidst so much violence made a searing imprint on me despite having lived in San Salvador with my Salvadoran partner before beginning the study and having worked on violence and precarity for more than a decade. [...] All of this heightened my awareness of and sensibility to violence, and the more time I spent in the field, the more the stories and images of violence piled up. I had nightmares that turned into sleepless nights, and despite being exhausted I remained unable to rest. I took impulsive decisions to regain some agency amidst circumstances that felt beyond my control. Normally an extrovert, I often preferred to be alone, and apart from an occasional thrill of warmth or wonder, the lustre of the world around me faded. [...] My agitation pursued me back to*

London where I took time off. Once I tried to watch a film to distract myself, but the film's negative foreshadowing unsettled me and I had an agonising night struggling to keep my mounting panic at bay. When I got my hair cut, the stylist commented that my hair had grown during the months I was away and asked how my trip went. Without my meaning or wanting it, a torrent of horrific stories streamed out of me. I watched people's eyes widen behind



me in the mirror. Tentatively, I began reaching out to other people who study violence and mentioning that I was finding my fieldwork more difficult than I had expected. Alluding to my struggles threw open the floodgates. Everyone, it turned out, had their own stories. I heard about nightmares, insomnia, compulsive exercise, benders of all kinds, addiction, and the straining and splitting of relationships with friends, relatives, and lovers. Several people showed me their tattoos, attempts to give a physical form to their distress and indelible reminders of pain and suffering they had witnessed. Others told me they had abandoned researching violence altogether, with one explaining simply that, 'The work damaged my spirit.'

(Source: Markowitz [2021](#))



## INSIGHTS FROM PRACTICE: IMPACTS OF CHALLENGING RESEARCH

"We had just received a dataset of nearly 100 interviews conducted with women and men and mental health and violence in Afghanistan. I was excited to read people's stories – it was a context I didn't know well and I knew that the data would have lots of surprises and new insights. I started reading the first story and only got a few pages in when I had to stop. The story was a horrible and detailed account of severe abuse like I had never encountered before (I had been researching violence against women for nearly 10 years at this point). I looked out the window trying to catch the tears, not sure if I could continue at all. I got myself a cup of tea and then returned to the transcript. Even after I'd finished for the day, I couldn't stop thinking about it. It was all I thought about for months, imagining every detail of this woman's life and what had happened. Imagining the same things happening to my own children and what that would be like. Weeks passed like this. Then out of the blue, I received an email from the PI on the project offering counselling support as part of the project to everyone on our team who was working with the Afghanistan dataset. It was a lifesaver."

(Source: Co-investigator on a large multinational project in South Asia)

There are **strategies researchers can employ to manage and reduce the risk of vicarious trauma** and **steps they can take to enable a more trauma-informed research practice in their institutions**, including:

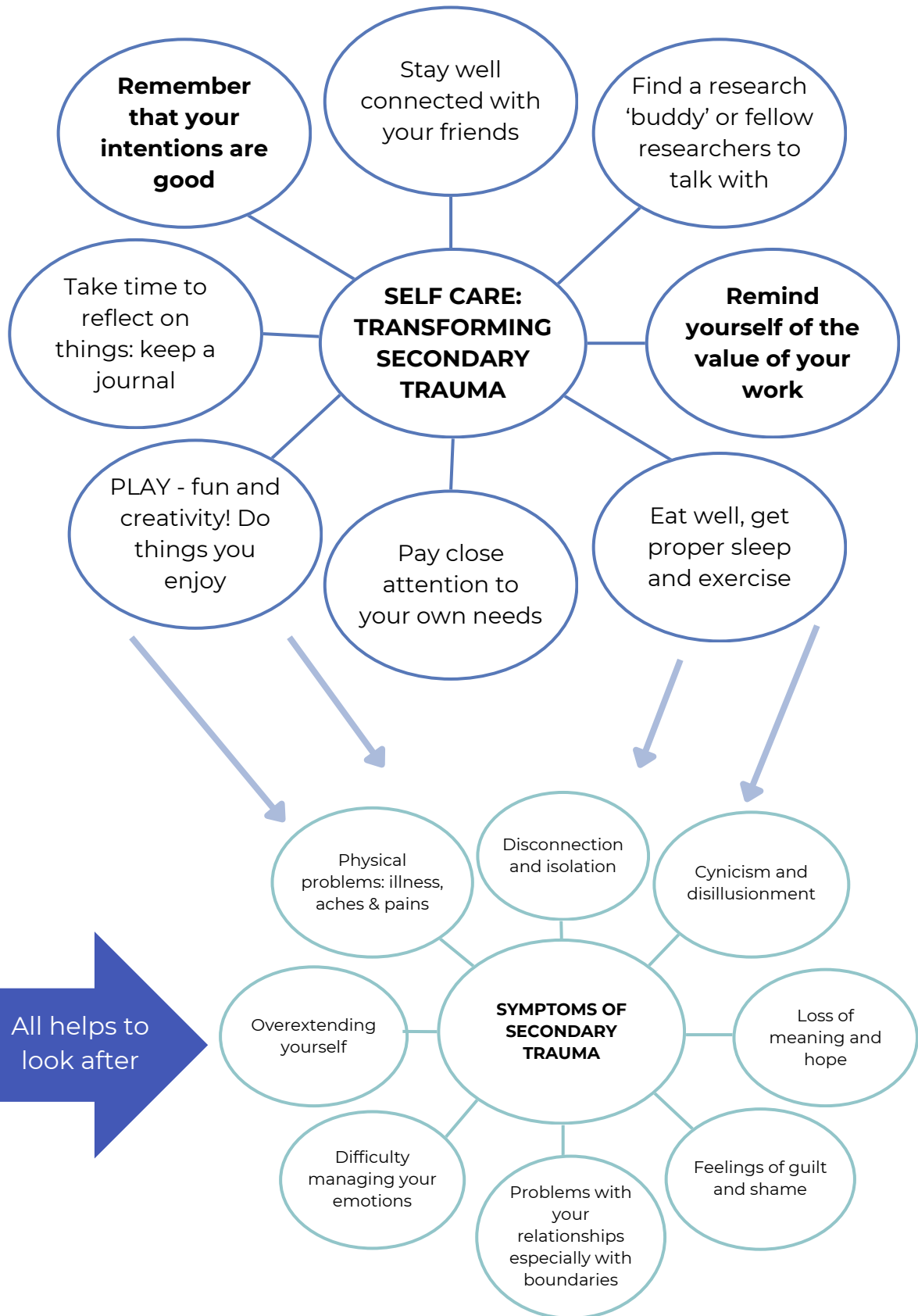
- Learn about the research topic or participants; reflect on your attitudes, beliefs, and own personal experiences with the topic. (more on reflexivity below)
- Know that this work will affect you and learn how to identify early warning signs of vicarious trauma and emotional distress.
- Know that this is a normal reaction to doing emotionally or ethically challenging research.
- Avoid denigrating or downplaying the importance of your own emotions or those of others.
- Increase your self-observation - recognise and chart your signs of stress, vicarious trauma and burnout.
- Take care of yourself emotionally - engage in relaxing and self-soothing activities, develop and nurture self-care strategies that work for you.
- As individual researchers, practice an “ethics of self-care” where possible and agitate for its inclusion in the institutional research culture. The [SVRI ‘Dare to Care’](#) online course about understanding stress, burnout, vicarious trauma, wellness, resilience, self and collective care can be a good starting point.
- Make time to look after your physical and mental wellbeing.
- Maintain a healthy work/life balance - have outside interests.
- Be realistic about what you can accomplish - avoid wishful thinking.
- Plan and balance your workload – try to achieve a mix of more and less emotionally demanding activities and allow space and time in between exposure to traumatic experiences.
- Take regular breaks, take time off when you need to.
- Engage with and inculcate humour and fun into your work beyond the research topic.
- Seek social support from colleagues, family members, and friends.
- Use peer support and seek out reflective spaces to discuss the emotional impacts of your work.
- If you need it, take up group or individual therapy.
- Take up training opportunities. If there are no opportunities available at your institution yet, you could enrol in the [CONVERGE Conducting Emotionally Challenging Research](#) online training module from the Natural Hazards Center at the University of Colorado Boulder (free to access but registration required).
- Monitor exposure to other traumatic material and manage non-research activities, such as social media.



(Source: Adapted from BMA [2022](#), Dickson-Swift [2022](#): 478; SVRI [2010](#))



## TOOLBOX: IDEAS FOR SELF-CARE



(Source: Oxford University Social Sciences Division 2016)

Developing a **reflexive stance** is key to supporting researchers engaged in emotionally or ethically challenging work and the development of a level of self-awareness of the impact of such research. This **asks researchers to assume some of the responsibility for their own protection and self-care and should go hand in hand with institutions providing safe spaces for reflection**, for example through trauma-sensitive supervisions, debriefing, and peer support networks. Fahie (2014) suggests regular, structured, critical reflection as good practice as this will assist researchers to attune to the emotional impacts of their research, consider their own positionality and support them with relational boundary management as well as the management of the emotional labour in the research process. For example, journaling or diary keeping can be helpful as it “allows the researcher to be both part of, and detached from, the research process at the same time and, therefore, able to develop a deeper understanding of what has happened and its emotional impact on themselves” (Fahie 2014: 29). Kinitz (2022: 1644) highlights to “[t]ake particular caution engaging in reflexivity as a systemically marginalized researcher. Reflexive processes are likely to be more burdensome given the intentional work of thinking about your experiences of marginalization and/or trauma.” There has been an increase in autoethnographic and reflective accounts on the impacts of having undertaken emotionally or ethically challenging research in different research fields and contexts, which might be a good and helpful starting point for researchers in helping them with their structured and critical reflection on their own experiences (e.g., Astill 2018, Fahie 2014, Gleeson 2022, Kinitz 2022, Markowitz 2021, McGowan 2020, Stahlke 2018).



### INSIGHTS FROM RESEARCHERS: SELF-CARE AND COPING STRATEGIES

In our survey, we asked our respondents whether they practise any self-care or coping strategies:

*“I try, although I don't know how good I am at initiating them when they're needed. I tend to only realise in hindsight that they might have been a good thing to do earlier... e.g., I find I will be really unmotivated and put off tasks like transcription and coding for a few weeks. Get frustrated with myself that I'm behind and realise retrospectively I may have lost motivation/been task-avoidant as my mind's way of keeping my mental health in check. Unconsciously.”*

*“I attend online meetings with a group on emotionally challenging research [...]. I try and swim as much as possible and watch funny TV shows.”*

*“Grounding work, managing work pattern (e.g. only one or two interviews per week).”*

*“Building in time away from the research, allowing myself time for exercise etc. as part of my research day if I'm working on difficult themes.”*



*“Reducing exposure to social media, not discussing work outside of work hours, going to therapy sessions.”*

*“When I see women are no longer in that situation it makes me feel better. I ask participants several times during the course of the interview how they are feeling and if they need to stop and at the end check in with them, make sure I end with some positivity. When I see them leaving with a smile or thanking me for listening to them it makes me feel better as well. It works as a coping mechanism for me.”*

*“I monitor how much I engage with at a given time – if my reading and conversations are all about a particularly distressing topic, I try to space this out to give my week more balance. I also try and only work my hours where possible and schedule breaks and nice things like walks to help with balance and wellbeing.”*

*“Debriefing sessions with the team, journaling, feeding back and discussing with community partners.”*

*“Acknowledgment and self-forgiveness. Time to process, space to talk without judgement.”*

## 4

## COPING STRATEGIES AND GROUNDING TECHNIQUES

Coping strategies and grounding techniques are **a set of simple exercises** to help you detach from emotional pain, focus on the present moment, calm your mind, and manage anxiety or other distressing emotions. These techniques work by redirecting your attention away from distressing thoughts or feelings and the difficult emotions you are experiencing, and towards something that is tangible or sensory in the present moment. You can also think of grounding as centering, distracting, creating a safe place, or healthy detachment. Although coping strategies and grounding techniques do not solve the problem(s) that add to your emotional distress, they **can assist you in gaining control over your feelings and emotions in the immediate** and help to prevent the situation from getting worse.

### Some tips and suggestions:

- Different exercises work for different people, so take time to find what best works for you through trial and error. You can start with trying out the ones in this toolkit.
- Try to notice which methods and techniques you like best.
- Start grounding early on in a negative mood cycle. Start before the anger, anxiety, or other feeling gets out of control.
- Practice! Practice! Practice! Like any other skill, grounding takes practice. So practice as often as possible and before you actually need it. Then, when you need to call upon this skill you will have it, know it, and use it well.
- Make up an index card or type in your phone a list of your best grounding methods. Have the list available so it is there when you need it.
- Create a voice recording of a grounding message or a positive coping statement

that you can play when needed. You can ask your counsellor or someone close to you to record it if you want to hear someone else's voice.

- Have others assist you in grounding. Teach family, friends, and peers about grounding, so that they can help guide you with it if you become overwhelmed.
- Don't give up!

(Source: Adapted from [Trauma Research UK](#) and [Winona State University](#))



## INSIGHTS FROM PRACTICE: DRAWING ON COPING STRATEGIES

*"When I returned to San Salvador after some time away, I had a strategy to manage my exposure to traumatic material, which I refined day by day. The first of its three components was finding other people doing similar work and knowing that they were willing to listen to me fumble for words to describe difficult experiences. Second, I aimed to keep some energy in reserve so as to avoid what the American Psychological Association calls the 'fatigue point,' the place at which intended performance continues to rise while actual performance plunges (Williamson 2018). After unknowingly blowing through my limits and dealing with the fallout for months after my first round of fieldwork, I was learning to consciously approach my edge. The unpredictability of the field meant that sometimes I catapulted past fatigue, but I mostly avoided the symptoms that plagued me earlier in my work. When I took time off, I reminded myself that, 'care work is work. It is not self-indulgent; it is radical and necessary' (Mountz et al. 2015, 4 quoted in Drozdowski and Dominey-Howes 2015, 20). Finally, I practised two grounding exercises every day. At night before bed, I observed how I was breathing and pictured myself tracing my breaths in my head. As the ragged lines became straight, I tried to retain each inhale and exhale, seeing the rhombuses and parallelograms take shape behind my eyes. Once I settled into a pattern, I imagined outlining it over and over again, thick black lines becoming steady and solid. The second exercise varied depending on what I encountered during the day. If I needed time away from my thoughts, I meditated on my senses in the moment: five things I could see, four things I could hear, three things I could feel, two things I could smell, and one that I could taste. Otherwise, I pictured myself in the woods alongside running water and imagined unspooling each thought from my mind, placing it onto a leaf, and watching the leaf drift downstream. Sometimes the thoughts seemed tethered to something, stubborn in their refusal to float away, and then the scene around me would transform and I was by a still pond filled with lily pads. My thoughts were stationary, but at least I could observe them and find beauty and serenity around me."*

(Source: Markowitz 2021)



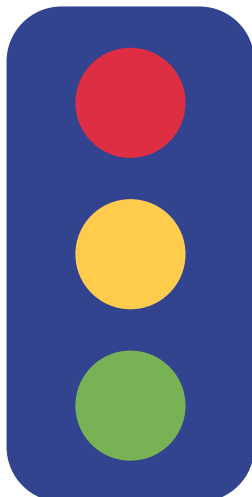
## TOOLBOX: THE TRAFFIC LIGHT TECHNIQUE



The Traffic Light Technique is a tool for managing anxiety that can help stop negative thinking or worrying. It uses visualisation and distraction to alter the brain's thought process which is automatically wired to protect you from anything that might be harmful.

It can also be adapted to many different stages of the research process, from ethics and as part of risk assessment and management for participants (as we saw in a previous section), to training interviewers, field researchers and assistants.

**CHANGE THE COURSE OF THOSE NEGATIVE THOUGHTS BY USING THIS SIMPLE TECHNIQUE!**



### **STOP!**

Any intrusive, negative or worrying thoughts by accepting it is just that, a thought.

### **PAUSE**

Take a deep breathe in through your nose, sigh and smile. Now visualise your happy place.

### **GO**

Change your state. Do something completely different, stretch, dance, laugh and act on your positive intentions.

(Source: [Trauma Research UK](#))



## TOOLBOX: THE 54321 TECHNIQUE



A simple grounding technique using your five senses. It works by bringing you back to the present moment and focusing on your surroundings:



**5**

Look around  
for 5 things  
you can see



**4**

Feel around  
for 4 things  
you can touch



**3**

Pay attention  
to 3 things  
you can hear



**2**

Be aware of 2  
things you can  
smell



**1**

Notice 1 thing  
you can taste

### How does it work?

The 54321 grounding technique is a mindfulness exercise designed to help you manage anxiety, stress, and overwhelming emotions by reconnecting you with your immediate environment. It utilises the five senses – sight, touch, hearing, smell, and taste – as a means to anchor your focus to the present moment. By doing so, the technique can help break the cycle of anxious or racing thoughts, offering a practical way to regain a sense of control and calm. Here's why this technique works:

- **Immediate Distraction:** When anxiety strikes, it often involves either fixating on negative thoughts from the past or worrying about the future. By prompting you to notice things around you, the technique shifts your mental energy to the present. This immediate distraction can provide relief from spiralling thought patterns and bring a sense of stability.
- **Mindfulness Principles:** Mindfulness is the practice of being fully present and aware of the current moment without judgment. The 54321 technique embodies these principles by guiding your attention to the sensory experiences happening in the “here and now.” This practice fosters a non-judgmental awareness of your surroundings and emotions, allowing you to observe them without becoming entangled in them.
- **Tangible and Concrete:** The technique offers tangible, concrete steps to follow. This structure can be particularly beneficial during times of distress when decision-making and focus might be compromised. The clear sequence of observing sights, sensations, sounds, smells, and tastes provides a straightforward framework to follow, making it accessible even during heightened emotional states.
- **Accessibility:** One of the strengths of the 54321 technique is its simplicity and accessibility. It doesn't require any special equipment or training, and it can be done virtually anywhere at any time. This accessibility makes it a valuable tool for managing stress and anxiety in various situations.

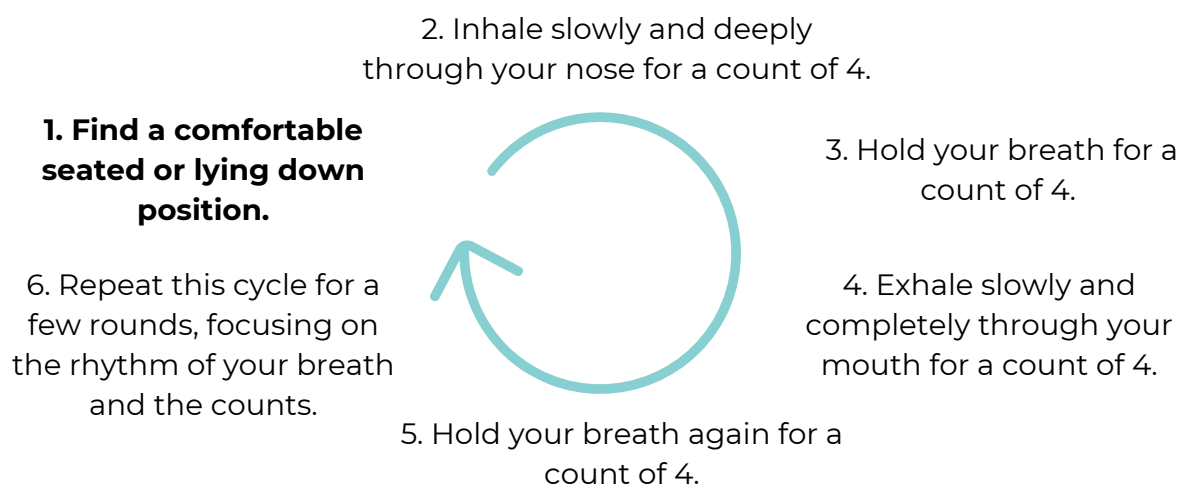
(Source: [Trauma Research UK](#))



## TOOLBOX: THE SQUARE/BOX BREATHING TECHNIQUE



The square or box breathing technique is named after its four equal sides, which consist of inhaling, holding, exhaling, and holding again, each for a count of 4. This technique is straightforward and can be done anywhere, helping you regain a sense of calm and presence by simply focusing on your breath and its rhythm. This technique offers a simple and effective way to manage stress, anxiety, and overwhelming emotions:



### Benefits of the square breathing technique:

- **Immediate Calming:** The structured rhythm of the Square Breathing technique naturally slows down your breathing rate. This signals your body's relaxation response, helping to reduce stress and anxiety almost instantly.
- **Accessible Anywhere:** This technique requires no special equipment or environment. It can be practiced discreetly in any setting whenever you need a moment to ground yourself and regain composure.
- **Mindfulness and Presence:** As you concentrate on the four equal phases of the breath, your attention is drawn away from racing thoughts and worries. This encourages a mindful awareness of the present, allowing you to detach from stressors.
- **Regulation of Emotions:** By deliberately controlling your breath, you indirectly influence your body's physiological responses. This can lead to better emotional regulation, making it easier to manage intense feelings.
- **Easy to Learn:** The Square Breathing technique is uncomplicated and doesn't demand prior experience or training. Anyone can quickly grasp the concept and benefit from it.
- **Quick Stress Relief:** In moments of tension or unease, a few rounds of Square Breathing can provide immediate relief and help you approach situations with a clearer mind.
- **Improved Focus:** By channelling your attention to the rhythmic pattern of breathing, you're training your mind to focus on the here and now. This can have a positive impact on your overall concentration and cognitive function.

(Source: [Trauma Research UK](#))



## TOOLBOX: THE WATER TECHNIQUE



The water grounding technique leverages the sensory nature of water to bring you into the present moment, nurture mindfulness, anchor you in your body, and provide an immediate distraction from stress and anxiety. It's an easily accessible method to ground yourself and more effectively manage overwhelming emotions.



**1.** Immerse your hands under a gentle stream of warm running water. Allow your awareness to centre on the delicate sensation of the water's temperature caressing your palms, fingertips, and the back of your hands.



**2.** Change the water temperature to cold and once again notice the different sensations as the water flows over both sides of your hands.



**3.** Sigh deeply and repeat several times.

### How does it work?

Using water as a grounding technique can be highly effective for a variety of reasons:

- **Sensory Focus:** Water is an excellent sensory medium. This technique involves paying attention to the temperature and sensations of water, which redirects your focus from anxious or racing thoughts to your immediate physical experiences. This sensory engagement helps ground you in the present moment.
- **Mindfulness and Awareness:** The technique encourages mindfulness, a practice of being fully present as your thoughts are automatically directed to the water. When feeling overwhelmed, redirecting your attention to the sensory experience can interrupt thought patterns that contribute to stress or anxiety.
- **Anchoring in the Body:** Placing your hands under warm and cold water prompts a heightened awareness of physical sensations. This brings you back into your body and out of your head.
- **Practicing Control:** The act of changing the water temperature gives you a sense of control over your immediate environment. This can be particularly empowering when negative feelings might make you feel powerless.
- **Repetition and Routine:** Repeating the warm-to-cold water cycle several times establishes a rhythmic routine that can be soothing. The repetition itself can help establish a sense of predictability and stability in your surroundings.
- **Quick and Accessible:** This technique can be practiced almost anywhere with access to water. It's a discreet and practical tool to use in a variety of situations.

(Source: [Trauma Research UK](#)).

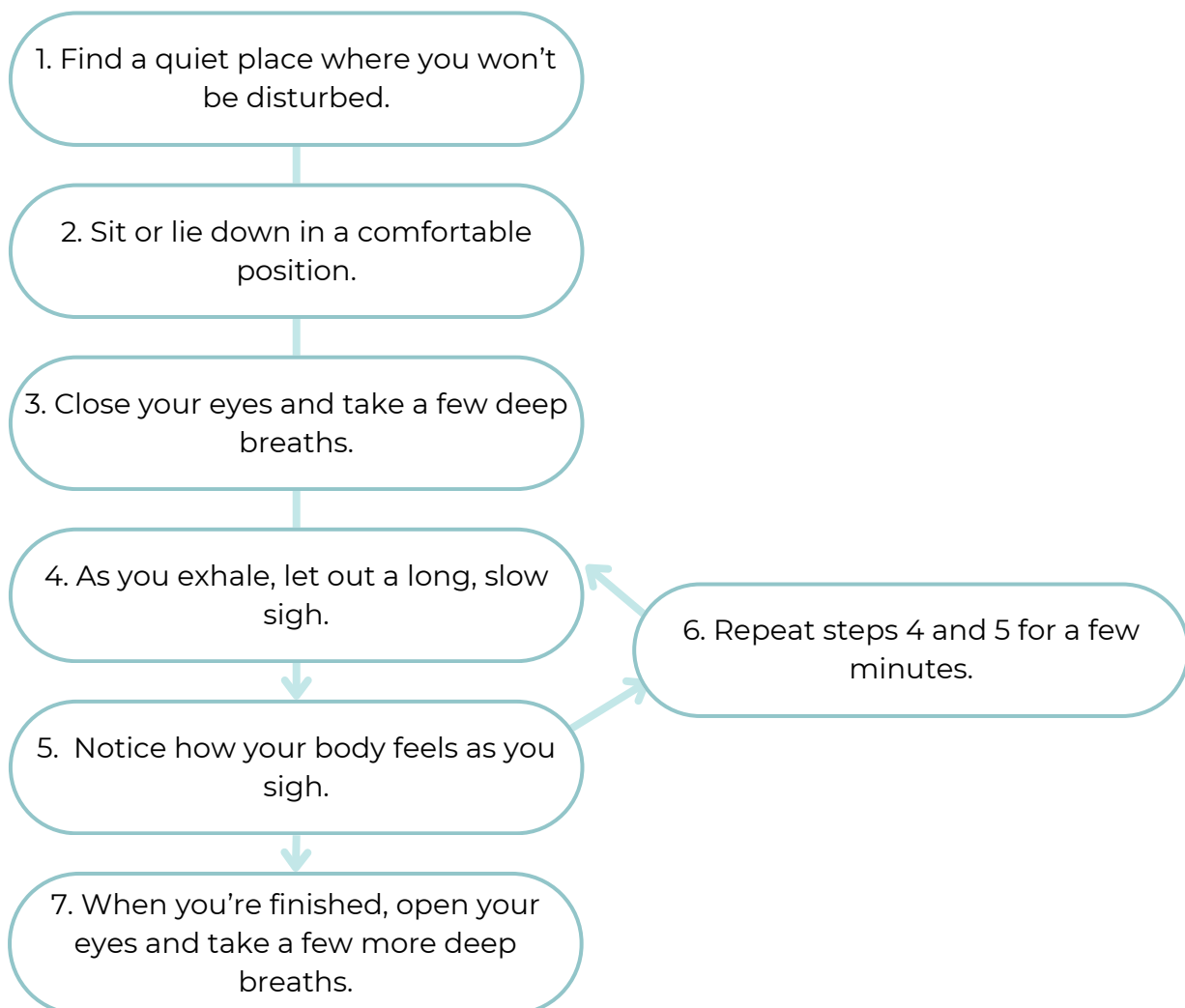


## TOOLBOX: THE SIGHING TECHNIQUE



We naturally sigh when something is over. This is because sighing acts as a psychological reset for our brain. It tricks our brain into thinking that the task or problem is over before it even starts, which gives us a psychological advantage. To use this technique, simply think about the task or problem that you are dreading or making you feel uneasy. As you sigh, tell your brain that you are okay with it. This will help you to feel calmer and more in control.

### How to practice the sighing technique:



### Here are some additional tips for practicing the sighing technique:

- Focus on the feeling of the air as it leaves your body.
- Let go of any tension in your body as you sigh.
- Think about the task or problem that you are dreading or making you feel uneasy.
- As you sigh, tell your brain that you are okay with it.
- Practice the sighing technique regularly to help you manage stress and anxiety.

### Here are some variations on the sighing technique that you can try:

- Try sighing through your nose or your mouth.
- Try sighing out a specific word or phrase.
- Try sighing in a certain rhythm or pattern.
- Try sighing while you're doing another activity, such as walking or meditating.

Experiment with different variations of the sighing technique to find what works best for you. With regular practice, you'll be able to use sighing as a powerful tool for managing stress and anxiety.

(Source: [Trauma Research UK](#).)



## TOOLBOX: THE DISTRACTION TECHNIQUE



The Distraction Technique is a simple yet effective grounding method designed to redirect your attention away from distressing thoughts or feelings. This technique capitalizes on the power of distraction to help you regain a sense of calm and composure:

1

**Identify a Distraction:** Choose an activity or object that can fully capture your attention. This could be anything that interests you and can engage your mind.

2

**Immerse Yourself:** Once you've chosen your distraction, fully immerse yourself in it. Direct your thoughts, emotions, and focus onto this activity. Engage with it wholeheartedly, exploring its details and intricacies.

3

**Maintain the Focus:** Whenever you find yourself overwhelmed by stress, anxiety, or intrusive thoughts, intentionally shift your attention to your chosen distraction. Keep your mind absorbed in the activity, allowing it to serve as a temporary respite from the distress.

### Why does it work?

The Distraction Technique operates on the principle that redirecting your thoughts towards a neutral or positive activity can interrupt the cycle of negative thinking and emotional distress. By engaging in an absorbing task, you effectively distance yourself from stressors, granting your mind a much-needed break. This technique doesn't seek to ignore or suppress your emotions; rather, it provides a strategic way to temporarily detach from them, allowing you to return to the situation with a clearer perspective once you've regained your composure. By consistently practicing The Distraction Technique, you empower yourself with a tool that can be applied whenever you're confronted with overwhelming emotions.

(Source: [Trauma Research UK](#).)





## TOOLBOX: THE BUTTERFLY HUG TECHNIQUE



A self-soothing method designed to alleviate anxiety, panic and distress. It involves rhythmic tapping or touching movements on your body to create a sense of comfort and security:



### 1. Position Your Hands:

Cross your arms over your chest, similar to how you would hug yourself. Your hands should rest on your upper arms.



### 2. Tap or Pat:

Begin tapping or gently patting your hands alternately on your upper arms. The movement should be soothing and rhythmic.



### 3. Breathe Mindfully:

As you tap or pat, take slow and deep breaths. Inhale through your nose for a count of four, hold for a count of four, and exhale through your mouth for a count of four.



### 4. Focus on Comfort:

As you continue tapping and breathing, focus your attention on the comforting sensation of your hands touching your arms. Imagine this movement as a gentle, reassuring hug.



### 5. Engage in the Moment:

If your mind starts to wander, gently guide your focus back to the tapping, the touch of your hands, and the rhythm of your breath.

### How and why does it work?

This technique combines physical touch with mindful breathing, creating a dual sensation that eases anxiety. The rhythmic tapping or patting mimics a comforting hug, which can trigger the release of calming neurochemicals in your brain. Additionally, the focused breathing cultivates mindfulness and redirects your attention from anxious thoughts to the present moment. This technique provides a way to self-soothe and create a sense of safety during moments of distress.

(Source: *Trauma Research UK*)



## TOOLBOX: STRUCTURED JOURNALING APPROACHES



A regular journaling practice is a coping strategy that can help you with identifying your emotions, processing unpleasant memories, understanding trauma triggers and reframing your beliefs that arise from the traumatic experience.

### Journal Prompts and Sentence Stems

Journal prompts and sentence stems provide a helpful structure for expressing emotions, thoughts, and memories associated with trauma. They offer a starting point that can facilitate a more focused and intentional journaling practice. Consider incorporating these prompts into your journaling routine:



- Today, I am proud of myself for...
- One thing I would like to let go of is...
- When I think about my family (or childhood), I feel...
- The strengths I have gained from my experiences are...
- If I could offer my younger self one piece of advice, it would be...
- I feel [emotion] when I think about...
- The impact of my trauma on my life has been...
- Something I wish others understood about my experiences is...
- Today, I am working towards...
- Today, I am taking care of myself by...
- A challenge I am currently facing in my healing journey is...
- One thing I appreciate about my resilience is...
- One thing I appreciate about (social support)...
- When I reflect on my progress, I feel...
- Something I would like to forgive myself for is...
- A boundary I need to establish for my well-being is...
- I am showing up for myself today by...

Remember, these sentence stems are meant to inspire self-reflection and promote healing. Feel free to modify them to suit your personal experiences and needs.

### Mind Mapping

Another option is called Mind Mapping or Clustering. This visual representation can help you see connections, patterns, and new perspectives. Start with a central idea or theme in the middle of a blank page and create a mind map by circling the idea or theme and then creating branches with related thoughts, emotions, and memories. Use free association with the central idea, such as exploring the theme: 'Boundaries I need to establish for my well-being'.



### List-Making: Organizing Thoughts and Emotions

List-making is a fun technique that can help us organize our thoughts and emotions in a structured and concise manner. A list offers a sense of containment and clarity, making it easier to process and manage complex feelings associated with trauma. Consider these list-making approaches:



1. Gratitude lists: Reflecting on things you are grateful for can foster a positive mindset and counterbalance negative thoughts.
2. Self-care lists: Identifying activities that promote self-care can enhance emotional well-being and provide a sense of self-nurturing.
3. Triggers and coping strategies lists: Identifying triggers and effective coping strategies empowers individuals to manage potential triggers and develop healthy coping mechanisms.
4. Achievements lists: Recognizing personal accomplishments, no matter how small, can help rebuild self-esteem and confidence.

By incorporating list-making techniques into your journaling practice, you can develop a sense of order and stability while acknowledging and addressing any trauma-related challenges. To increase engagement, you could use different coloured pens when you mind map and create lists.

*(Source: DiGonis 2023)*



### KEY ACTION POINTS FOR RESEARCHERS

- If you do have symptoms, then you should seek support from your line manager, your institution, or the NHS. Do not let it go.
- It is not your fault, and the responsibility should be on institutions to support researchers working on emotionally challenging research. However, you know yourself better than anyone else, and it is important to be aware of your limits.
- It is important to know and employ coping techniques and self-care strategies to manage your stress in the immediate – for example, when you are feeling overwhelmed, take the time needed to give yourself breaks, try some of the grounding techniques mentioned here, engage in practices which can reduce stress and anxiety and/or regular exercise.
- Do what is suitable and manageable for you as there is no one size fits all.

## CONCLUDING THOUGHTS

This toolkit speaks to the urgency of research funders, higher education institutions, and researchers across all levels of experience and positions within the institutional landscape working together to reduce the impacts of emotional challenges and harms in research practice. As part of this, we all need to collectively put support mechanisms in place to mitigate against the risk of vicarious or secondary trauma. To move this forward, we strongly advocate for more research about experiences and cross-cutting challenges researchers have faced in conducting emotionally or ethically challenging research and the development of an evidence base for effective prevention mechanisms. To be better able to measure progress, we will equally need mechanisms for evaluating the development of institutional practices, policies, and procedures and the gathering of robust case studies of different initiatives and efforts taking place across the UK and globally.

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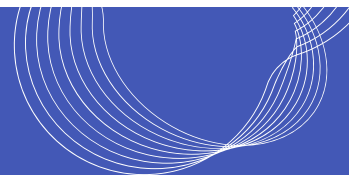
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