Taking a Trauma-Informed Approach in User Research

Notes from the learning and development sessions (Sept – Oct 2022)

The following notes are a summary of the ideas and discussion points that came up in the later learning sessions, as we reflected on what ‘Taking a Trauma-Informed Approach’ might for us as individual URs, and as a practice/profession in the Scottish sector. Some ideas will need addressing at a practice-level, or within our working groups, but some of these ideas are things which you can start doing today, if you think they’re worth trying out in your own research (and please share with the rest of us how you got on!).

Content:

1. [How might we embed the principles of taking a trauma-informed approach in user research](#_How_Might_We)?

2. [Reflections on things we need to stop and start as user researchers, in our regular work](#_Reflections_on_things)

3. [Changes we can make in SG user research practice, templates and guidance, and training](#_Changes_we_can)

# **How Might We ....**

## ... **create a feeling of safety?**

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| **Session Design** | * schedule breaks so participant doesn’t have to ask for one * ask whether you really need remote observers / limit the number of people who are attending * make sure participant can easily reach door * be mindful of the location for in-person sessions * physical environment of room – make it as least ‘institution-like’ as possible * virtual sessions – give options of whether camera is on or not * virtual session – have observers’ cameras off and muted |
| **Training** | * Train / brief your note-takers in advance * Circulate briefing pack for project team before each research round, highlighting responsibilities and how it might feel to be a research participant, back channels to use for communications during sessions * Be aware of the support other researchers in your team may need, based on experience |
| **Session welcome / first steps** | * Build rapport and trust through opening questions that relax participant and make them feel confident about answering you * Make small talk at the start, asking if participants are comfortable or would like refreshments * introduce note-takers visually before cameras are switched off * Agreements / codes of conduct / rules * Be clear about the content of the research session |
| **Personal presentation** | * Be mindful of how you are dressed, and your appearance * Calm voices and gentle movements * Relaxed, open, body language * Introduce yourself |
| **Communication with participant** | * Remind people of their rights, including being able to stop or take a break at any time without giving reasons * Make it clear there are no wrong answers * Ask about accessibility needs * Disability – ask how the participant talks about their disability / what language do they prefer to use? * Reassure people that the session is a safe space with complete anonymity / we’re independent of the service they access |

## **... engender a sense of trust?**

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| **Session Design** | * In advance – send information packs to let people know what will happen in the session, and introduce researchers the participant will meet (include photos if possible) * Take more time to get into the session, building a relationship at the beginning * Outline the reasons the research is being done * Know which constraints can actually be addressed by the project before you meet participants * Remote research – remember to do the ‘lift chat’ at the start * Allocate time (at end?) to discuss the next steps with the data * Share outcomes of research, where possible * Think about where else in the project participants/service users could be involved |
| **Personal Presentation** | * Don’t be too officious * Smile. Even if you’re dialling in. * Ensure your tone is open and reassuring * Turn up on time. Preferably, be early. |
| **Communication with participant** | * Reassure about anonymity * Remind participant they don’t have to answer anything they don’t want to – agree a code phrase for questions they want to ‘pass’ on * Tell participant who is going to run the session if it was not the person they’ve had contact with so far * Ask participant if they prefer a male or female researcher (if possible) |

## **... offer choice and control?**

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| **Session design** | * Offer choice on structure / timing of activities within the session (e.g. when to take a break) * Give control over the environment the session happens in (in-person or remote; location) * Give control over amount of information shared * Choice of sex/gender of researcher * Give choice over way information is shared (e.g. verbally, written) * Offer to provide questions in advance * X-card strategy for questions people would prefer not to answer (this could be part of the advance questions approach) * Give participants the choice of bringing someone with them to the session * Give participants autonomy over the structure of the conversation |
| **Communication with participants** | * ‘You can let us know if you’d like to withdraw anything you’ve said’ [... but how will they remember what they’ve said?? Are you going to share a summary of the notes?] * Remember that interrupting can be both positive and negative |

## ... **collaborate and recognise strengths?**

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| **Session design** | * Recognise what strengths people have (e.g. focusing on what opportunities there are) * Bring someone else in from the same community to collaborate on the questions asking (e.g. do they lead, and you drill down in follow-up questions for more detail?) * Co-facilitation model, where we use a ‘train the trainer’ approach and get someone from the same community to lead the session |
| **Communication with participant** | * ‘Tell us if we’re not asking the right questions’ * ‘I’m not the expert here, you are’ * Use language such as ‘collaboration’ rather than ‘helping us’ * ‘You’re playing a huge part in making this service better for others’ |

# **Reflections on things we need to Stop and Start as individual URs in our regular work**

**Stop...**

... keeping note-takers secret

... changing note-takers last minute

... not letting note-takers introduce themselves

... assuming we don’t need a trauma-informed approach for non-sensitive subjects

... doing a rushed research session

... setting an agenda without consultation

... continuing session without asking whether a break is needed

... rushing to primary research without doing the desk research

... very quick turn-arounds and short-notice information sharing

**Start...**

... send a summary / update to participants after the session or after analysis

... extend the mindset of ‘not overwhelming the participant’ to consider all aspects of the research (not just the number of researchers)

... training researchers to understand their own trauma experiences, and how they may relate to the participants’ experiences

... checking if there are any traumatic experiences we can mitigate for before the session

... sharing session plan in advance with participants to ask whether there are any topics they wouldn’t want to discuss in the research setting that has been created.

... helping note-takers to understand their responsibilities

... establishing a relationship with your note-takers (through a briefing?)

... more emphasis on aftercare – guidance for support and signposting

# **Changes we can make in User Research**

## **Practice and Policy in UCD**

### **Senior/practice-level support and actions**

* Find ways to surface/elevate issues that come through from participants that are trauma responses
* Policy and process to fairly pay participants for their time and expertise
* Trauma-informed champions
* Trauma-informed objectives
* Away-days / debrief days to discuss approaches
* Setting grounds rules for ways of working, collaboratively, with others you’ll be working with (participants and project team)

### **Individual-level actions**

* Walkthrough of physical or online environments as part of research design process/ piloting, to check for anything that might have an impact on participants’ sense of safety
* Mandatory debrief protocol, and creating time in our research design to include this
* Get feedback from participants after sessions, or organisation that we’ve worked with
* Onboarding project team in trauma-informed approach before research round starts

## **Guidance and templates**

* Checklist to ensure spaces we share with participants make them feel safe and welcomed
* Incorporate 4 principles of Trauma-informed approach into our ethics documentation (opportunity to reflect on specific actions for a given research round)
* ‘Recognising Trauma’ pack
* Template trauma screener, for use in recruitment, if applicable to the research round.
* Style guide, for speaking respectfully about trauma, and with trauma survivors
* Guidance around data sharing and consent, providing materials ahead of time, set agendas, introductions and getting to know the people you’ll be working with.
* Template for how to feed back to participants after the session, to be transparent about insights and what will happen next.

## **Training**

* What can we learn from colleagues working in client support (SSS)?
* What are the best ways of getting feedback on sessions we lead?
* Communication skills
* Confidence / assertiveness training to help researchers feel empowered and safe
* How can we be honest about the limitations of UR? (setting boundaries and realistic expectations)
* Topic-specific training (e.g. bereavement)
* Tools to help researcher manage triggered trauma, de-escalate or calm a situation, and bring participants back to ‘window of tolerance’
* Learning the different ways in which people can contribute (moving beyond interviews, surveys and usability tests)