Conducting Safe Evaluation and Research

AES Conference 2025

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A joint initiative of WorkSafe Victoria and Monash University

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Aim of this session

1. What is safety and why does it matter?
2. Developing safe research guidelines
3. The guidelines in action

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What is safety and why does it matter?

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An individual's perception of whether they can express themselves, share ideas, and take interpersonal risks without fear of embarrassment, rejection, or retribution.

An individual's perception of whether they feel emotionally, socially, physiologically secure and respected without fear of judgement, harm or re-traumatisation.

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The focus of today

An individual's perception of whether they can express themselves, share ideas, and take interpersonal risks without fear of embarrassment, rejection, or retribution.

An individual's perception of whether they feel emotionally, socially, physiologically secure and respected without fear of judgement, harm or re-traumatization.

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Why does conducting safe research matter?

	Context	Implications
Best practice 	Growing recognition of the value of lived experience	Moral and ethical responsibility to avoid re-traumatisation/harm
Worker wellbeing 	Rate of mental injury in the workplace is rising	Reduces risk of mental injury and increases staff retention
Quality research 	Safety is linked to increased innovation and collaboration	Enhances data validity and research outcomes
Legal duty 	Psychosocial hazards are now recognised under workplace safety legislation	Employers must identify and manage psychosocial hazards

How did we get here?

Working with more vulnerable populations

Research on psychosocial hazards and mental injury

Suicide intervention training

A comprehensive and proactive approach

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Reflection activity: Why does safety matter?

- What brought you to this workshop?
- What does ‘psychological safety in research’ mean to you?
- Have you already tried to make your research safer?
  - What worked?
  - What didn’t work?

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Developing the guidelines

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Our approach to design

Our guideline was developed using a collaborative and iterative approach

A live document

- Trauma-informed approaches
- Occupational health and safety lens
- Best practice in research and ethics
- Reflective practice

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An institute-wide approach

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The guidelines

Introduction

Governance and culture

Participant safety

Staff wellbeing and safety

Monitoring and evaluation

Includes information on:

- Core commitment
- ISCRR context
- Key concepts

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The guidelines

- Introduction
- **Governance and culture**
- Participant safety
- Staff wellbeing and safety
- Monitoring and evaluation

Includes standards on:

- Decision making
- Mission and values
- Policies and HR
- Leadership style, skills and knowledge
- Organisational change

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The guidelines

- Introduction
- Governance and culture
- **Participant safety**
- Staff wellbeing and safety
- Monitoring and evaluation

Includes standards on:

- Cultural safety
- Ethics and consent
- Research design and practice
- Researcher knowledge and skills
- Participant choice and empowerment

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The guidelines

- Introduction
- Governance and culture
- Participant safety
- **Staff wellbeing and safety**
- Monitoring and evaluation

Includes standards on:

- Work environment
- Job control and design
- Exposure to traumatic content
- Support systems
- Supervision and performance
- Knowledge and skills
- Staff recruitment and onboarding

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The guidelines

- Introduction
- Governance and culture
- Participant safety
- Staff wellbeing and safety
- **Monitoring and evaluation**

Includes standards on:

- Oversight
- Data collection
- Reporting
- Revising

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Reflection activity: Developing safe research practices?

- Who needs to be considered when designing safe research practice in your context?
- Who has a role in contributing to the design of safe research practice in your context? How can they be involved?
- Who is responsible for leading safe research practice vs who is accountable for safe research practice?

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Protocols

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Safe interview protocol

- Considers the **safety** of **participants and researchers**

Before

Organising the interview
- Characteristics of participant group
- Choices (mode, timing, location)
- Lived experience

Immediately before
- Securing support
- Allocating time
- Review protocols

During

Responding to stress
- Sensitive questions
- Identifying distress
- Dialogue
- Options for action

Suicide intervention
- Training
- Developing safety plan
- Calling support services

After

Participant
- Latent distress
- Support options
- Ethics considerations

Research
- Engage in debriefing
- Engage in self-care
- Team reflection

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Lived and living experience protocol

Aim of Guidelines

- Consistent and respectful way of working
- Diverse lived experiences (e.g. injured workers, workers from culturally diverse backgrounds)
- Move beyond tokenism towards genuine collaboration

Types of Engagement

- Leadership
- Partnership
- Involving
- Consulting
- Range: from review/ consultation to full co-design

Purpose

- Guide researchers in planning, implementing, and reviewing engagement
- Build respectful partnerships
- Procedural checklists for all stages

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Protocol

Pre-engagement	Checkbox
Pre-engagement planning and ethics	
Identify skills required for the level of engagement.	☐
Describe required skills in plain, jargon-free language.	☐
Outline time commitments and budget in as much detail as possible (include recruitment administration charges and pre or post-engagement requirements – for example, if Experts are expected to provide feedback on the final document, outline comprehensive time commitment and payment budget expectations).	☐
For Research – consider ethical issues and submit application for approval prior to engagement.	☐
Identify recruitment and engagement strategy	
Recruitment - consumer network or panel, trusted member organisations, professional networks, social media, advocacy organisations. Consider strategies for targeting relevant groups according to the research needs and how to access minority or other underrepresented populations where applicable.	☐
Engagement – online application, personal approaches, professional representatives.	☐

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Lived and living experience protocol

Pre-engagement planning

- Identify skills/knowledge needed
- Estimate time commitment
- Find appropriate experts

Introductions

- Clarify roles and expectations
- Topics, outcomes
- Ways of working together (timing, mode preferences)
- Address IP, confidentiality

Formal agreement

- Plain-language terms
- Include payment & authorship
- Can be restricted by funding or University regulations

During engagement

- Trauma-informed processes
- Honour agreed processes
- Manage disagreements & provide support

Post engagement

- Debrief & provide feedback
- Updates on translation
- Acknowledge contributions

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Staff safety and wellbeing

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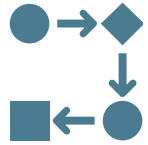
Psychosocial hazards

- A psychosocial hazard is anything that could cause psychological harm


Job demands


Job control


Support


Role clarity


Change management


Violence and aggression


Bullying


Traumatic events or material

Emotional demand related hazards

		Hazard	Indicators
Trauma related		Vicarious trauma Secondary traumatic stress	Cumulative or immediate distress Symptoms similar to PTSD
Exhaustion related		Compassion fatigue Burnout	Cumulative Exhaustion, detachment, reduced capacity
Values related		Moral injury	Betrayal vs transgressive Guilt, shame, loss of faith/trust

Proactive approach to psychosocial hazards

Job demands	• All staff workload is actively reviewed and monitored • Research is funded and designed in line with safety standards
Job control	• Exposure to traumatic content is limited to times of the day/week • Staff are given choice on topic, diversity of workload etc.
Support	• An array of support is offered and embedded (informal, formal, peer, supervisor) e.g. staff matching, reflective practice, supervision, project debriefing etc.
Traumatic events or material	• Staff are educated and aware of risks and impacts • Debriefing following exposure and scheduled debriefing

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Reflection activity: Strategies and resources?

- What skills, knowledge or resources do you and/or your team need to make safe research happen?
- What strategies could you implement to make research and work safer for you and your colleagues?

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Workshop

Psychologically Safe Research:

Hazards & Best Practice

Half-Day Workshop
Monash College City Campus

24 October, 2025
9:30 am - 12:30 pm
AEDT

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https://www.trybooking.com/DFCAJ

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Questions? Feedback? Ideas?

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Thank you

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