

AOIR

Safety Guidance for Qualitative Fieldwork

2022

We know fieldwork can be complicated to set up and execute at the best of times. This safety checklist is meant to make it easy to ensure the safety of researchers is built into the process. These should be treated as best practice guidelines and sit alongside, and hopefully complement, any specific company policies that may exist.

Most of these guidelines are written with both face to face and digital fieldwork in mind. While, of course, the purely physical considerations are appropriate for face-to-face fieldwork, we shouldn't forget that digital fieldwork can also adversely affect researchers, and should be considered along similar lines.

The AQR wants to explicitly acknowledge that researchers are from a multitude of backgrounds and we encourage everyone to use these guidelines with an anti-racist, anti-ableist, anti-homophobic, and overall anti-discriminative lens.

We have attempted to bake this into the guidelines, but **welcome open dialogue and feedback** on these issues.

During design phase, conduct risk assessments for fieldwork, including but not limited to:

Who your participants are

What additional risks or vulnerabilities might they present based on their previous experiences, mental health status, etc.

Location of fieldwork

Is it likely to cover rural/isolated areas, or areas with a high crime rate?

Content of interviews

Will it cover sensitive topics that might lead to participants or researchers becoming distressed?

Team compatibility check

If at all possible from a resourcing perspective, offer researchers in the proposed team the option to (anonymously) turn down the project if it will be difficult or triggering for them based on their previous experience and/or characteristics.

Brief recruiters to validate who participants are

Recruiters can ask participants to ensure they have ID available to show the researcher upon arrival.

Accessibility

Recruiters can check whether their home is accessible, who else will be present on the day, even whether they have any pets etc. to help better determine which researcher should conduct which interview.

Explicitly consider and discuss psychological and physical safety of all researchers in the team. If issues are raised by any researcher based on their personal characteristics and/or beliefs, or experiences, **listen to them and make accommodations.**

Based on the previous risk assessments/considerations, make sure there is enough budget assigned at the proposal stage to practise safe working, for example:

Experienced or senior researchers conducting more of the fieldwork than might be 'standard'.

'Doubling up' researchers on fieldwork so that junior, inexperienced researchers have a senior or male chaperone, if appropriate.

Have conversations with the whole research team as to whether any of the team wants to be accompanied for their psychological or physical own safety.

Planning for more interviews than usual to 'fall through'.

Additional funds for taxis.

Prep for Travel

Recruiters should fully screen, and ideally conduct a short video call with, participants before a researcher meets them. Any uncertainties should be flagged with the team.

There should be an established “check in - check out - escalate” procedure.

This means that any researcher on fieldwork has a named contact they “check in” with when they arrive at the fieldwork location and “check out” with when they have safely left. If the researcher doesn’t check in or check out, the named contact should be prepared to follow the escalation procedure.

Researchers should prepare adequately before heading out on fieldwork:

Ensure their phone is fully charged.

Write down physically any necessary contact details, locations, instructions, taxi numbers (in-case phone breaks or gets lost).

Take their own bottle of water so they don’t feel the need to accept any offered drinks, if it feels uncomfortable to do so.

Take sensible precautions if driving e.g. park in a well-lit area and near other cars, if possible etc.

Risk Assessment

Budget

Travel Prep

Keep In Mind

When international fieldwork takes place, a local fixer/driver/ chaperone should be arranged where possible.

When travelling internationally, researchers should prepare by consulting literature about local culture and customs, as well as experiences by other travellers to the same area/neighbourhood/ accommodation

(Female) solo traveller websites and blogs can be extremely useful here.

[Solo Traveler World](#)

[The Blonde Abroad](#)

[Globe Link](#)

Companies/project leads should make sure that basic communication and financial protocols are in place (esp. internationally):

This is so that researchers are always able to communicate, and are confident they can spend any necessary money to operate in the safest way (not necessarily the cheapest way)

A company mobile provided.

Phone contracts that cover international fees.

Cover by international travel insurance.

Access to funds such as a company credit card or advance payments to researchers’ personal accounts.

Keep In Mind

It should be explicitly communicated to researchers that they should:

Always listen to their “gut feelings” and should abandon fieldwork if, at any point, they feel unsafe.

Feel free to use company expenses to operate safely, or safely leave a situation.

No question is a ‘stupid’ one

There should be open lines of communication for listening to any questions or concerns researchers may have about specific fieldwork expectations and situations.

One suggestion might be setting aside a dedicated time or meeting to specifically gather ‘silly’ questions ahead of fieldwork starting.

CHECK IN

In-line with the company's "check in / check out / escalate" procedure, a named person in the organisation should know a researcher's location at each point during fieldwork (e.g. participant's address or any other agreed meetings point/s).

Researchers should follow any established "check in / check out" procedure, meaning they let their agreed contact know when they get to the interview location, and once they have safely left.

If the named contact does not hear from their researcher they should follow the established escalation procedures.

Researchers should always listen to their gut and abandon fieldwork at any point if they feel unsafe.

Researchers should feel able to use expenses to increase a feeling of safety, or to safely leave a situation.

CHECK OUT

Where possible, researchers should avoid carrying large amounts of cash especially if they are travelling alone (e.g. only carry the cash required for that interview, or have incentive payments organised via BACS).

Consider meeting in a public space rather than a private home.

Researchers to debrief with their project team / organisation after fieldwork

This is to give the researcher the opportunity to raise any risk factors that occurred to prevent them from happening again – every project can provide a learning to make this a better experience for all.

Offer wellbeing or emotional support for researchers in case they are adversely impacted by what they experience whilst on fieldwork.

A note on psychological safety & mental wellbeing

Everything discussed here relates to mental/psychological wellbeing as well as physical.

We feel better emotionally when we feel safe and heard. To look after someone's wellbeing we don't need therapeutic expertise, or to know exactly what to say. We need to start the conversation and validate people's feelings, and in doing so, create a culture of openness where it's safe to talk about concerns.

Use all your qualitative expertise to understand how your team is feeling and how we can make them feel safer!

During brainstorming or safety meetings, you could:

Ask explicitly for "what 2 things..." are you most concerned about... / should we change to make this feel safer...

Use projection technique and ask what they think other people might be concerned about.

Use techniques like [crazy 8s](#) and [laddering](#) to get below surface answers.

Even just **explicitly** telling them that their safety and wellbeing is important (and we want their input in putting these guidelines into practice) is a great start.

Much of this will come down to explicitly putting in the time to talk, ask and listen:

Schedule brainstorms about safety and wellbeing.

Be consistent about checking in after fieldwork - 10-15 minutes to talk about the interview.

Involve the whole team in safety planning.



Contact

For further information and advice, please reach out:

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website