

SAFE RESEARCH PARTNERSHIP WITH PEOPLE WITH LIVED AND LIVING EXPERIENCE

Checklist for Researchers
Partnering with People with
Lived and Living Experience (LE)





This checklist is designed to help researchers without lived experience be mindful of the considerations when engaging people with lived and living experience in participatory research and/or co-design processes.

CMHDARN and Lived Experience Australia would like to acknowledge and thank the lived experience advisory team for their generous collaboration and invaluable contributions to the development of this resource.

CONTENTS

1. Build Trust and Establish a Safe Environment	3
2. Establishing Group Norms	4
3. Clarify Roles and Expectations	5
4. Ensure Emotional and Psychological Safety	6
5. Ensure Financial and Professional Respect	7
6. Protect LE Partners' and Participants' Wellbeing	8
7. Assessing Suitability	8

1. BUILD TRUST AND ESTABLISH A SAFE ENVIRONMENT

- ✓ **Understand the LE driving imperative for research:** Commence the project from the understanding that the drivers and impacts of answering a research question ultimately rest with the people, communities and organisations that will be affected by the research outcomes
- ✓ **Leadership by example:** Model inclusive values and actions. Position equity, value diverse expertise and promote teamwork from the outset as a research group is preparing for LE inclusion in the team.
- ✓ **Create a welcoming atmosphere:** Acknowledge the expertise of LE partners from the start and demonstrate respect for their lived experience throughout all stages of the process.
- ✓ **Promote equity in participation:** Ensure LE partners are equally involved in all discussions, decision-making, and research activities. Avoid tokenism by having more than one or two LE people on the team – ideally aim for a minimum of 50/50 share of lived and learned expertise. Don't assume that LE partners don't need to know all aspects of the project – participation will be richer and more meaningful if all parties are across every element of the research endeavour.
- ✓ **Clear communication:** Avoid using academic jargon that may feel inaccessible or triggering. Always define acronyms or terms that could be confusing or unfamiliar to those without academic training or experience in their use.



Need a refresher of what co-design and participatory research means?

[VIEW THESE RESOURCES](#)

“Don't assume for me what I need to know”

2. ESTABLISHING GROUP NORMS

- ✓ **Initiate an Orientation Session:** Start with a collaborative session to establish expectations, responsibilities, and safety protocols. This builds trust and ensures everyone understands their role and the research process.
- ✓ **Develop Group Norms Together:** Jointly create group norms during orientation. This fosters a sense of ownership and clarity among all members.
- ✓ **Routine Check-ins:** Regularly revisit these group norms throughout the process. Conduct check-ins and seek input from the group to set realistic expectations and eliminate guesswork.
- ✓ **Document and Refer Back:** Document the established group norms. This serves as a reference tool if issues of respect or inclusivity arise, helping to maintain a positive and productive environment.



3. CLARIFY ROLES AND EXPECTATIONS

- ✓ **Define co-design at the outset:** Make sure everyone understands what co-design research is and how they will be involved. Create definitions of the project's goals with the LE partners, negotiate the specific tasks people will be responsible for, and clarify any parts of the research process that cannot be changed.
- ✓ **Collaboratively decide on each person's role and contributions:** Ensure all partners understand how their expertise will drive and direct the project. This includes a clear and shared understanding of the research process and aims. Consider formalising through a 'roles and responsibilities' document to provide clarity and support accountability.
- ✓ **Transparent decision-making:** Actively involve LE partners in understanding the rationale behind decisions and clearly communicate the non-negotiable aspects of the project (e.g., reporting obligations to funders, ethics requirements, trial protocols, etc.). Ensure that their insights are valued and integrated throughout the decision-making process.
- ✓ **Co-design takes time:** Patience is key to equitable participatory research. It's important to be adaptable and flexible with time allocated to co-design processes to ensure everyone has had the opportunity to contribute and support each phase of the project.



4. ENSURE EMOTIONAL AND PSYCHOLOGICAL SAFETY

- ✓ **Offer mentoring and support:** Pair LE partners with a conventional researcher ally who can provide support with research processes, software, or navigating the organisational culture. Arrange 'peer meetings' for LE partners to support each other and engage in debriefing sessions, if desired by the LE partners.
- ✓ **Provide flexibility:** Accommodate the unique needs of LE partners, such as flexible working hours, travel and field work adjustments, or the option to opt out if needed.
- ✓ **Ask people what they want or prefer:** Acknowledge and support self-care plans and strategies.
- ✓ **Check-in regularly:** Collaboratively create a process for checking in on the wellbeing of all research partners. Establish a debriefing or feedback process to gauge how everyone is feeling and address any issues that arise. It is important not to solely check-in on the LE research partners as this may contribute to feeling 'othered' or foster assumptions on the wellbeing and capacity of people.
- ✓ **Balance support and independence:** Avoid over-checking in with LE researchers, as this can feel demeaning or patronising. Give people the space to step out if needed but respect their autonomy.



Research on topics exploring mental health and substance use may present challenging topics such as stigma, discrimination, trauma, and coercion. It is important to be mindful that contributing lived and living expertise involves a significant emotional investment. That is why prioritising LE partners' emotional and psychological safety is critical when planning and implementing participatory research projects.

‘Ticking off everything in this checklist will also help support the emotional and psychological safety of everyone in the project.’

5. ENSURE FINANCIAL AND PROFESSIONAL RESPECT

- ✓ **Compensate appropriately:** Ensure LE partners are fairly remunerated for their time and contributions. Compensation should be mutually agreed upon, considering both payment and other forms of recognition (e.g., gift cards), with input from both LE partners and the organisation to ensure fairness and appropriateness.
- ✓ **Acknowledge lived experience as invaluable:** Include the names of LE researchers on all outputs (e.g., publications, conference presentations, reports), and ensure their contribution is recognised and valued within the project if the person consents to this. Respect their choice regarding public recognition, acknowledging their preference for whether they wish to be publicly identified.



For further information read the 'Acknowledgement Matters' resource.

[VIEW THIS RESOURCE](#)

6. PROTECT LE PARTNERS' AND PARTICIPANTS' WELLBEING

- ✓ **Plan for emotional safety:** Reflect on and address the impact the research process might have on LE partners and participants. Have resources in place for support (if necessary) such as links to therapeutic and peer support services.
- ✓ **Understand the organisational culture:** Familiarise yourself with the expectations and dynamics of the institution or organisation involved in the research and transparently share these expectations with all research partners from the outset of a project. This can help LE partners feel more comfortable and prepared for any possible clashes in values.

For you this is a topic of interest to be dissected or measured, written about; but for me this is real; this is my life, my history, and the impacts are real; they shape who I am, and sometimes they are painful.

7. ASSESSING SUITABILITY

- ✓ **Align values and expertise:** Ensure that LE partners feel their values and expertise align with the project's aims and purpose.
- ✓ **Transparent pre-screening:** Implement pre-screening processes that clearly communicate the research objectives and role capabilities. This helps LE partners assess their readiness and willingness to contribute their expertise.
- ✓ **Co-develop position descriptions:** Collaboratively create a position description with LE partners to include in the project's EOI, to support finding the best match for the project.
- ✓ **Navigating 'no':** If applicants are not the right fit, consider how to communicate this respectfully and explore offering other options or future opportunities.

