Centre for Urban Health Solutions
Survey Research Unit

Methodology Bits

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Preparing Interviewers and Research Participants for a Safe Interview

Planning and implementing safety protocols increases the likelihood of having a safe and positive research experience for both the research team and the participants. It is important to tailor protocols to the population, topic and methods of your study. Our research unit works with many hard-to-reach populations including those that are experiencing homelessness, housing instability, mental health issues and substance abuse. It is often necessary for us to interview participants in their homes and other locations in the community. As a result, we have created safety protocols that we adapt and strengthen based on study population and topic. This edition of Methodology Bits outlines how safety measures can be incorporated into your research study protocol. We draw from our experience of survey data collection with an emphasis on in-person interviewing.

Planning ahead is essential

- Provide safety protocol training to all team members prior to entering the field so they can be appropriately proactive and reactive while conducting data collection. It is recommended that training includes non-violent crisis intervention, trauma-informed practices and how to address suicidal ideation.
- Use screening and initial points of contact to get to know a bit about the participant. This can help inform details such as assigning a room where the interviewee would feel more comfortable and sending two interviewers when going to a participant's home.
- Request emergency contact information for all members of the team. Have this list readily available in both electronic and paper copy so study team members have quick access to it when interviewers are in the field. This information can be used when the team is unable to contact the interviewers in the field.

Safety check-in and check-out

Having a check-in and check-out protocol will help to ensure the safety of both interviewer and participant. Assigning a research staff to be responsible for taking telephone check-ins and check-outs for all in-person interviews is recommended, especially when it is being conducted outside of an office. When the interviewer arrives and is with the participant, they should call the designated staff member to let them know their location, who they are with and that they will call again once they have left the location. When they are no longer with the participant, they should call to inform that the interview is complete and they have left.

Interview location

When possible, schedule interviews during business hours at your office. When this is not possible, you may consider scheduling a private room at a library, community centre, or another public area (e.g. coffee shop). In some cases, if the participant uses services in the community, it may be possible to book something there (e.g. drop-in centre). Offering public transportation tokens to participants can facilitate their travel outside their home and to somewhere in the community to meet with the interviewers. In some cases, participants prefer to be interviewed in their own home. When conducting interviews at a participant's private residence consider the following:

- Sending two interviewers to the location can, in some cases, help everyone to feel more at ease.
- Some residences may have a common room that can be reserved ahead of time, which offers a semi-public space.
- Interviews are best conducted in living rooms and other open areas, rather than bedrooms.
- Interviewers should sit between the participant and the exit, in case they need to leave the interview area.
- Interviewers should pay attention to the physical environment upon entering an interview location. Are there signs that the environment is unsafe? If so, then do not start the interview.

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Managing a difficult situation

- Understanding that some participants may experience feelings of self-harm, but have no intent of acting upon those feelings can sometimes be a difficult concept to understand. Training staff to identify this difference should be something to consider, as not all participants who have these feelings will be a risk to themselves or others. Also, coordinated access to a mental health professional to assist with identifying potential high risk situations can help your team act quickly when necessary.
- If an interview does not go as planned and the interviewer does not feel safe completing the interview. Interviewers should have the support of the safety check-in staff to help them end the interview.
- Allowing space for discussions between the study coordinator and interviewer prior to entering a challenging interview can help your team develop an adaptive approach to ensure participant and interviewer safety. Discussion topics may include engagement style, avoiding potential or known triggers, and reviewing previous interviewing history. Making time for debriefing following a difficult interview can also be helpful to process negative emotions that may result. Sharing ideas on how to cope with these emotions and ideas on things to try next time could be helpful.

Community Resources

- In most cases, it is considered best practice to offer a list of community resources to all study participants. Work with your Principal Investigator and REB to determine if and when additional support for the participant is necessary (e.g. risk of harm to self and/or others).
- Prepare your resources according to population needs (e.g. geographic location, language). Examples may include: crisis phone line, food banks, shelters, employment and income security. A comprehensive list of searchable community organizations can be found online at 211.ca. Familiarize yourself with community resources before relaying information about their services during a time of urgent need. Knowing the types of services they provide, catchment area, and available languages are some examples of questions to ask an organization. It is important to revise this list and have it REB approved, as additional resources are identified.

Determine your safety timeline

It is useful to have a pre-determined protocol on how to respond when an interviewer does not make their safety check-out when expected. Creating a flow chart is a useful tool to outline steps that staff in the office will implement and at what time interval (e.g. when to start calling the participant, when to move on to calling the interviewer's emergency contacts). Ensure that all team members are aware of this timeline so that everyone knows their role and at what point to act.

General tips

- Keep records of all communications (e.g. phone calls, letters, past interviews, notes from case managers), and make note of anything that could help you to plan a safe interview. This is particularly important in longitudinal studies where this information can help ensure safe approaches for scheduling future interviews.
- For longitudinal studies, ask interviewers to fill out an "Interviewer Comments" document at each interview point, and incorporate any applicable information into safety measures for follow-up interviews.
- Interviewers should carry a hard (paper) copy of important phone numbers (e.g. coordinator, other team members) while in the field in the event that their cell phone needs to be charged.
- Special attention should be given to possible triggers of trauma in any interview and resources should be readily available in case they are needed
- Some participants may offer refreshments if the interview is taking place in their home. Although it may be difficult to refuse, it is best to refrain from accepting food and drink prepared by someone else. Informing the participant that it's your institution's policy, not to accept food and drink will help to alleviate what can be an uncomfortable situation.
- Sometimes additional protocols are recommended for the safety of staff. For example, for peer interviewers, personalized safety plans should be developed to identify and manage potential scenarios or triggers that can come about when working with their peers.

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