Guest editorial: Investigating trauma: methodological, emotional and ethical challenges for the qualitative researcher

By definition, trauma occurs in rare circumstances in most people's lives. However, the extreme circumstances that often precipitate traumas are commonplace: such as the fires, floods and tsunamis associated with climate change; the loneliness, mental health problems and deaths arising from the COVID-19 pandemic; the deaths, destruction and displacement caused by the recent international conflict in former Eastern Europe; and the high level of homicides found in a number of advanced states. Hitherto, research into trauma has been unusual in the management and organisational fields. Yet traumas demand organisational and management responses. The implications of researching trauma for the researcher can be significant and thus important to understand (Dickson-Swift *et al.*, 2007, 2008; Nikischer, 2019). The people directly affected by a traumatic event will often find their coping system overburdened (see Briere and Scott, 2014; Van der Kolk, 1998, 2003). Researchers will require special sets of skills and knowledge to operate effectively in such situations. This special issue explores the methodological, ethical and emotional issues and challenges that the qualitative researcher in the organisational and management fields may face while doing trauma research.

Why look into trauma in management and organisational studies?

To date, most of the literature about trauma research is found in psychology and medicine, where consideration of and reflection on methodological, ethical and emotional problems is a natural part of trauma research practice. The limited consideration of such issues in the management and organisational studies (MOS) literature may stem from an understandable over-emphasis on studying the impact of traumatic experience on research participants, with the effect of having dangerously understudied the trauma researchers' emotional, ethical and methodological challenges (Stoler, 2002; Campbell, 2013). Focussing on the latter is not simply a question of scholarly curiosity, certainly not an academic gap finding, but a matter of immediate practical, health and ethical value.

Conducting research in traumatising environments is trying because it may involve intense and potentially upsetting encounters of injustice and suffering, which can leave the researcher feeling guilty and exhausted (Morse and Field, 1995; Dickson-Swift *et al.*, 2007). Even examining secondary trauma accounts without direct interaction with the traumatised persons can lead to sleep disorder, emotional distress and a need for social assistance (Dickson-Swift *et al.*, 2007). This makes trauma research a particularly complex undertaking for the qualitative researcher. In this special issue, the guest editors seek to open up the topic in qualitative research in MOS.

What is trauma and how is it different from stress or PTSD?

Describing trauma is not an easy task because of a lack of accepted definition. The understanding of trauma evolved with the progression of the field of psychology (Dalenberg *et al.*, 2017; Walker, 2017). Early psychodynamic therapists such as Sigmund Freud and Josef

Breuer brought the conceptualisation of trauma (from the Greek "wound") of a physical wound to the idea of a wound in the memory, defining trauma "in terms of stimulation that exceeds the individual's ability to cope" (Dalenberg *et al.*, 2017, p. 15). However, recently, a psychiatrist and expert on trauma Bessel Van der Kolk emphasised that "trauma comes back as a reaction, not a memory", and emphasised the trauma imprints on the body, mind and soul. Ana Freud advocated for a person-specific definition of trauma, stating that trauma was specific to the individual's internal processes (Dalenberg *et al.*, 2017). We share the idea that a phenomenon experienced as traumatic by an individual may be experienced as atraumatic by another. As interpretivists, our understanding of trauma focusses on the subjective experiences of phenomena. Nonetheless, when dealing with trauma, qualitative researchers cannot allow themselves to become their participants' psychotherapists. Yet, researchers can learn from other disciplines about how to build and sustain rapport with traumatised individuals: vulnerability and empathy are needed. In other words, understanding trauma and the ways of relating to traumatised research participants becomes a matter of good research.

Most efforts in the field of psychotherapy to define trauma have been coupled with the ones that define post-traumatic stress disorder (PTSD). Consequently, many people confuse the two. PTSD is a diagnosis entered in the American Psychiatric Association in 1980 as an anxiety disorder. The symptoms listed for PTSD were only considered if they followed "a stressor that is 'outside the range of usual human experience and that would be markedly distressing to almost anyone'" (Dalenberg *et al.*, 2017, p. 18), emphasising the importance of the magnitude of the stressor. After experiencing trauma, a person can experience symptoms that have been associated to PTSD such as nightmares or flashbacks and even be diagnosed with PTSD. However, the experience of trauma can take many forms. Although we all experience stress at transient points, the trauma stays with the person once the traumatic experience is over.

Why look into the impact on qualitative researchers?
Although it has been acknowledged that trauma researchers must also be able to deal with participants' vulnerability, few scholars have looked at the emotional effects on the researcher (Campbell, 2013; Dickson-Swift *et al.*, 2007; Nikischer, 2019; Stoler, 2002). For example, Campbell (2013) reported that due to the traumatic nature of her research, the intellectual involvement in it was fast overtaken by an emotional one. Better understanding the roles and links between the intellectual and emotional involvements in trauma research is a fascinating and relevant area that demands attention. Furthermore, there are important ethical and methodological considerations when dealing with traumatised people, from how to get access to the research participants before meeting them to how to "end" the researcher–participant relationship safely and respectfully for all involved. Some attempts have been made to unearth ethical and methodological difficulties associated with research on traumatic experiences (Brennan, 2005; Campbell, 2013; Fahie, 2014; Schweitzer and Steel, 2008). For example, Brennan (2005) describes how the singularity of each experience in human trafficking makes generalisations often imprecise and overall a naïve undertaking. Traumatised people who are ready and willing to become research participants are often difficult to access, demanding additional time and resources from the researcher (Brennan, 2005; Buchanan and Denyer, 2013).

Ethical challenges can also arise in contexts where socio-cultural clashes exist (Schweitzer and Steel, 2008). These challenges are often unexpected and typically identified with hindsight in researchers' reflexive accounts. We observe a lack of clearly identified coping strategies and anticipation of methodological and ethical difficulties in trauma research practice in MOS. The unforeseen characters of many of these emotional, methodological and

ethical challenges are perhaps a result of the absence of frameworks and training in researching traumatic experiences. The field is missing guidelines on population-sensitive data collection and analysis methods despite a certain degree of transferability of practices from psychology studies like the implementation of "noninvasive sampling strategies" (Campbell, 2013, p. 2). However, even these strategies might bring new difficulties, as experienced by Campbell (2013), who altered the research design after someone was distressed for being excluded from the research. Trauma research may even lead researchers to question their role and identity. Campbell's self-reflexivity highlights the confusion and sense of responsibility beyond the purpose of the research that researchers may experience when being entrusted with accounts of traumatic experiences that may have been kept secret for years. Reflexivity in design and execution is, therefore, paramount in such sensitive research. Trauma may also strongly impact the data that can (or sometimes cannot) be collected. During the research process, the researcher may experience direct trauma, secondary traumatic stress (STS) – also known as compassion fatigue – or vicarious traumatisation (VT), a concept introduced by Pearlman and Saakvitne (1995), when it leads to a profound change in professionals' beliefs, impacting "trust, safety, control, esteem, and intimacy" (Nikischer, 2019, p. 905).

A call to bring dialogue on the impact of trauma in management and organisational studies

For this SI, we asked management and organisation scholars to share their reflexive accounts of the methodological, emotional and ethical challenges encountered when investigating trauma and more general frameworks for dealing with trauma whether intentional at the outset of the research or emergent during the research process as it evolves. We had a particular interest in submissions that explore the often unspoken and even the unspeakable in the research process that allows researchers to become self-aware of the involvement and impact their own emotions and experiences have throughout their research effort.

The inspiration for this SI stems from one guest editor's STS experience of studying secondary accounts of organisational members' traumatic experiences in extreme contexts and the paucity of MOS literature to understand such experiences. Unlike the direct trauma experienced by a person, STS is experienced by someone exposed to the trauma of others through direct contact or their stories and is mainly found in the caregiving professions (Figley, 2013; Joinson, 1992; Nikischer, 2019). For instance, Joinson (1992) describes compassion fatigue experienced by nurses and calls for greater awareness because it is difficult to recognise and "emotionally devastating" (Joinson, 1992, p. 116). She advises to "periodically reflect, assess, nurture, and renew yourself so you'll stay emotionally fit" (Joinson, 1992, p. 121), advice that may also be useful for qualitative researchers. Furthermore, STS has been recently studied in professions beyond caregiving "to other arenas where people interact with trauma victims and trauma stories" (Nikischer, 2019, p. 906). Similarly, qualitative researchers can be in such position and, therefore, at risk of experiencing STS. Because of this emotional toll, the guest editor had to find coping strategies to deal with the trauma-heavy data. Encountering trauma influenced the pace of the research and her analysis. As some of the contributors have also experienced, this had an impact on her identity as a researcher; for her too, the academic became personal. This can be in part explained by the power of imagination to understand and feel what has not been directly experienced.

Empathy in qualitative research is important as we often need "to be able to hear, feel, understand, and value the stories of others and to convey that felt empathy and understanding back to the [. . .] participant" (Gair, 2012, p. 134). In addition, the guest editor's STS was fuelled by past traumatic experiences. Different traumas can become entangled, one responding to the

other in a painful dialogue. We are not suggesting that someone who has experienced trauma in the past should avoid researching trauma, or that a person who has not experienced trauma cannot study trauma, but that particular attention should be paid to the potential of another person's trauma to trigger challenges for a qualitative researcher.

Contributions to this special issue

In our call for papers, we emphasised that the purpose of this special issue is to provide space in MOS for discussing emotional, methodological and ethical challenges that the qualitative researcher may face when investigating trauma. We present six contributions in this special issue which have engaged with such challenges. In order to foster a pluralist picture that allows for richness, in each of the contributions, the author(s) have described what they mean by trauma and the type of trauma (e.g. vicarious trauma) their contribution revolves around. The SI contributors share their experiences in encountering trauma in intended trauma research and seemingly non-traumatic research. They openly and honestly share their experiences, reflections and recommendations. We feel that these contributions represent a collection of thought-provoking papers that help to develop our understanding further to improve the practice of trauma research in MOS. We now introduce the papers in some detail.

In the first contribution, Corrigan (2022) takes an original perspective on qualitative interviews when vicarious traumatisation (VT) is involved. Specifically, an examination of the performances of VT of interview participants reveals new facets of an extreme case, the Ocean Ranger Oil Rig disaster, which has been subject to many investigations. Corrigan draws on secondary data from the case study of the Ocean Ranger disaster. More specifically, he collects data about interview participants (e.g. family members of deceased workers) in the dramatisation of VT. This paper contributes to extreme context research and trauma research in MOS by discussing self-presentation, audience and impression management in VT interviews through the lens of dramaturgy. Extreme cases, such as the one presented by Corrigan, produce widespread VT and in researching such cases, it is significant to consider trauma interviews. They provide an interesting reflection of interviewing, which, as Corrigan highlights, is not equivalent to "listening". Corrigan argues that VT interviews provide opportunities to engage in dramatic storytelling for the research participants and the researcher. In this type of storytelling in interviews, the interviewees perform a "traumatised self" demonstrating research participants' highly theatrical performance and how the self is strongly impacted by VT. It is noteworthy how Corrigan shows that the interviewees not only play a leading role in the dramaturgical performance of VT but are also the audience of their own representation. Furthermore, the richness of the data providing vivid descriptions of VT in this case study allows Corrigan to examine how the interviewees craft their own impressions of trauma. However, most qualitative methods in MOS do not allow reporting such impression management. With this contribution, Corrigan opens up new avenues for considering dramaturgical perspectives in future trauma research as well as in interview-based studies more generally.

Jané et al. (2022) present accounts of researcher trauma that they experienced directly during fieldwork in extreme contexts. Interestingly, even though they were conducting fieldwork in contexts they knew to be risky, Jané, Fernandez and Hällgren each experienced trauma as a surprise. Although they acknowledge that having experienced trauma as part of their distinctive research did not have a significant effect on data collection or the pace of the research, to the extent that it was ignored in the field notes, it did have a real impact on the way they made sense of their data. Furthermore, while the trauma accounts did not become part of the data in their respective studies, they did become part of them as researchers in that they remained "unresolved", which had an impact on their identity as qualitative researchers. It is therefore interesting to see that the impact for the qualitative researcher goes beyond the specific study in which the trauma is encountered. In fact, in the face of trauma,

Jané, Fernandez and Hällgren's respective identities as researchers became both a resource and a constraint. Jané, Fernandez and Hällgren highlight how institutional pressures have played out in the completion of their research, particularly in the position of one as a doctoral student. Other contributors to this SI also discuss the risks associated with these institutional constraints, providing a point of comparison. Furthermore, the position of the qualitative researcher attempting to maintain a professional distance, even for the field researcher, can be a real danger. Langley and Klag (2019) have discussed a researcher's "involvement paradox" in terms of the distance between researcher's involvements in the field and the researcher's voice actually expressed in the written results. In Jané, Fernandez and Hällgren's contribution, we can see the paradox of actually "being there" (in the field) but not "being seen" by the research participants. In trying to keep the researcher "invisible", one of Jané, Fernandez and Hällgren's anecdotes involve an experience where the researcher put his life in danger because he did not show his vulnerability to the research participants when he experienced the trauma in the field, and Jané, Fernandez and Hällgren's contribution encourages researchers to do the opposite. It is a brave act to show our vulnerability as researchers and try to understand how being vulnerable has affected our research. This vulnerability can, when acknowledged and accepted, provide a particular locus of understanding to interpret the experience of our research participants (Donoso, 2021).

This resonates with Mavin's (2022) idea that vulnerability can be a source of strength for researchers and for the research participants. While the combination of these two opposing terms might at first sight, be seen as an oxymoron, the article shows how vulnerability can be reconceptualised as strength. Mavin uses the four levels of reflexive practice presented by Hibbert (2021) on an individual interview in a unique qualitative study on women leaders' work-caused trauma. Mavin's reflexive account highlights the impact of gender on work-caused trauma and also shows the role of gender in establishing rapport with vulnerable research participants. In developing this rapport, Mavin shows the value in acknowledging each other's emotions and vulnerability to develop trust and shared meaning. Vulnerability is particularly difficult to express for women leaders who occupy a position historically associated with masculinity and often have to wear a metaphorical mask to avoid stigmatisation. However, conceptualising and recognising vulnerability as strength helps the participant to feel safe, let go of this mask and prepare for the emotional ordeal of the interview. Interestingly, Mavin shows how she dropped the "mask" of the researcher and the challenge of also experiencing emotional distress. Mavin highlights supportive preparatory actions for coping with trauma research, such as a commitment to reflexivity, which needs to be thought about when designing the study and having a psychological support system; for Mavin, it was having a trusted supervisor researcher.

Gilhuis and Molendjik (2022, p. 465) discuss the dilemmas they faced with moral emotions when studying moral injury amongst police personnel and war veterans. Here, Gilhuis and Molendijk offer rich reflections on their challenges in attempting to research moral injury "that is emotionally sustainable, ethically right and methodologically sound". Gilhuis and Molendijk draw on their experiences in two empirical studies of moral injury that brought emotional and methodological challenges and raised complex ethical considerations when the researchers' beliefs and values were challenged. Moral injury results from a morally transgressive act that one has perpetrated or failed to prevent. It is an ambivalent term because the person suffering from moral injury can be described as both a victim and a perpetrator. For the researcher, this means navigating through empathy and critique. As the authors highlight, in trauma research dealing with moral injury, it is not only difficult for research participants to share their stories, but also for researchers to hear them.

As Letherby and Zdrodowski (1995, p. 586) have commented: "*At times we feel empathy with our respondents, whereas at other times, we find we cannot identify with the* experience *and/or feelings of those we research. [. . .] we have found that we feel a strong sense of*

identification with some of our respondents, whereas at other times we have found it difficult, if not impossible, to relate to their own personal definitions".

Furthermore, Gilhuis and Molendijk discuss the presumed neutrality of the researcher, which is not possible to maintain, explaining their difficulties in responding to recognition requests from research participants who may expect something in return for their testimonies from the researcher. In such sense, Gilhuis and Molendijk's paper highlights how uncomfortable and trying the researcher's position can be in trauma research. They discuss how the researcher's voice, in terms of emotional reactions and moral judgements, should be heard in the study. Gilhuis and Molendijk contribute to the literature on emotions and qualitative research by discussing two perspectives, emotions "as means to create a 'way of knowing'" and emotions "as fundamental 'way of knowing'".

Finally, we include two contributions that highlight the impacts of this type of sensitive research on researchers and offer guidelines and recommendations. Dickson-Swift (2022) paper offers guidelines and protocols for qualitative trauma researchers and their teams. Dickson–Swift draws on 20 years of experience in researching sensitive topics – the empirical studies she has conducted and her publications – and the trauma research literature to document the critical challenges of the qualitative researcher who undertakes trauma research and offer guidelines and processes for managing the risks. She explores the potential harms of trauma research in terms of physical and emotional impact, not only for the researcher but for all members of a research team. For instance, Dickson–Swift examines the risks faced by research assistants, research supervisors and transcriptionists, who may not even be members of the research team with the increasing use of external companies for transcriptions and whose emotional safety is rarely taken into account in internal human subjects review boards (IRB) or ethics committees. Dickson–Swift also addresses the ethical challenges for the researcher and the potential for vicarious trauma. However, her approach is not limited to the individual level; she includes supervisors, managers, IRBs, and ethics committees to provide guidelines that inform trauma research practice. She presents and adapts tips, safety protocols and steps for undertaking "trauma-informed research practice" and thus provides a valuable toolkit for qualitative researchers who decide to investigate trauma or are unexpectedly confronted with trauma during their research.

Eliasson and DeHart (2022) provide a research note that specifically tackles the topic of trauma experienced during the research journey by junior researchers and students. They focus on three common challenges in trauma research: access to adequate materials and guidance by the researcher, internal and external constraints, and the limited conceptualisation of sensitive or vulnerable research. This research note focusses on mitigating these challenges through ethical principles. Eliasson and DeHart encourage qualitative researchers to reflect on and learn from the particular challenges they faced during the research process. They raise the issue of researcher protection in a manner consistent with that of research participants in ethics committees and IRBs, which is often not the case. When conducting first-time academic research, challenges such as the experience of trauma in the process of conducting research are rarely discussed in methodological training or in exchanges with experienced researchers. As Eliasson and DeHart point out, students and junior scholars are more susceptible to being vulnerable to, for example, the institutional pressure to finish studies on time or to publish, as highlighted in the "publish or perish culture" (see Moosa, 2018). Eliasson and DeHart's note shares coping strategies through best practices and recommendations, particularly beneficial for students and junior scholars.

Conclusion

We are pleased to have provoked more thinking and discussions around the topic of trauma for qualitative researchers within the context of MOS. In this special issue,

we offer some reflective accounts of trauma research and research under trauma, as well as frameworks to help qualitative researchers deal with trauma in research. We commend the contributors to this SI who encourage qualitative researchers to reflect on the impact of trauma on the researcher, the research team members and the research itself and who, by sharing their research stories, provide guidance. We are confident that the stories of trauma in research narrated by the researchers themselves and the guidelines offered by those who have experience in researching trauma as a topic of study and those who suddenly faced the topic of trauma during their research can help other qualitative researchers, be they junior or more experienced scholars. Experiencing trauma is sudden, unexpected and overwhelming. Embracing the theme of trauma in qualitative research can offer a fascinating perspective that illuminates social phenomena and provides a new lens through which to study these phenomena. It is interesting to provide more empirical articles that explore the theme of trauma in MOS. This theme, which is often present in extreme context research, is rarely found in published articles. Efforts to discuss the impact of trauma on the research and the researcher could bring more meaningful contributions. Furthermore, as was reported by some of the contributors of this special issue, the process of writing papers can be cathartic, offering a sort of release or closure from encountering trauma in research. It is a reflexive exercise in itself that can be beneficial to the qualitative researcher.

As guest editors, it is also our task to reflect on and point out the limited range of the contributions of this SI. As our call advertised, many topics related to trauma can lead to interesting contributions from and for qualitative researchers, many of which are not addressed by the contributions of this SI. We hope to see published more reflexive essays and perspectives related to researching trauma but even more empirical papers which are missing from this SI. We also argue that there is an impact of the emotion work and ethical and methodological choices related to trauma in the production of knowledge of the researcher. The impact of trauma on the researcher to generate insights for theorising remains under-researched. This particular aspect is rarely found in published articles and deserves more attention; this special issue is only one step in this direction. Trauma is common, and we hope that the discussion of the challenges facing the qualitative researcher will continue in MOS, to stimulate the reflections of IRBs, ethics committees, students, their supervisors and academic colleagues more generally.

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