

Effectively and meaningfully

involving the voices of lived
experience in influencing work

REPORT

Individuals &
Communities

Participation
& Influence

System &
Social Change

Lived
Experience

Practice &
Capacity
Building

Organisations
& Services

Policy
& Decision
Making

The
Robertson
Trust



The  Lines
Between

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EXECUTIVE SUMMARY

Resilience Learning Partnership was commissioned by The Robertson Trust to explore how organisations can effectively and meaningfully involve people with lived experience of poverty, trauma or both, in influencing work. The study aimed to inform The Trust's own influencing role and to identify wider lessons for organisations seeking to ensure that lived experience contributes safely, ethically and substantively to policy, practice and system change.

The research drew on engagement events with people with lived experience, interviews with organisations involved in lived experience work, an online survey and a literature review. Across these sources, there was strong agreement that lived experience involvement is most effective when it is embedded as part of organisational culture and decision-making, rather than treated as a one-off consultation exercise.

A central finding is that meaningful involvement depends on organisational readiness. Organisations need to be clear about why people are being involved, what can realistically be influenced and how lived experience insight will be used. A willingness to adapt systems, assumptions, decision-making processes and to ensure that staff have sufficient skills is also important. The fact that this has implications on time and resources should also be recognised. Lived experience voices have greatest influence when people are involved early, power is shared openly, and organisations are receptive to being challenged and changed by the insights offered.

The research also highlights the importance of relationships, trust and practical care. Participants with lived experience emphasised the importance of being listened to, respected, kept informed, paid appropriately and able to see the impact of contributions made. Effective involvement requires clear expectations, accessible language, flexible ways to contribute, feedback loops and support before, during and after participation.

Safety and choice are essential. Organisations should not expect people to retell traumatic experiences in order to contribute. Instead, lived experience should be understood as expertise that can help organisations understand systems, barriers and opportunities for change. Trauma-informed approaches should therefore shape the whole process, including recruitment, preparation, facilitation, safeguarding, debriefing and follow-up.

The study found that representation needs careful attention. Organisations should avoid relying on the same individuals or expecting one person or group to speak for a wider community. Inclusive recruitment, trusted intermediaries, varied routes into participation and simple, supportive processes can help broaden involvement and reduce barriers. Where people are not selected for a role or opportunity, this should be handled sensitively to minimise feelings of rejection or harm.

The involvement of staff with lived experience of poverty, trauma or both, raises related issues. Staff may draw on personal experience in ways that strengthen practice and insight, but disclosure should never be expected. Supportive organisational cultures, compassionate management, reflective supervision, appropriate boundaries and access to wellbeing support are needed to ensure staff are not reduced to, or exposed by, one aspect of their identity.

Leadership is critical. Senior leaders need to make lived experience involvement visible, resourced and embedded in policies, procedures and governance. This includes creating time for reflection, supporting staff training, using shared and accessible language, and demonstrating how lived experience insight informs organisational priorities and external influencing positions.

Overall, the evidence shows that involving lived experience meaningfully is both valuable and achievable, but only where organisations approach it as long-term culture change rather than consultation alone. The main risks are tokenism, weak feedback loops, poor support, unrealistic expectations and a lack of organisational willingness to act. These risks can be reduced when involvement is planned carefully, adequately resourced and grounded in power-sharing, transparency and care.

The report recommends that organisations: establish readiness before involving people with lived experience of poverty and/or trauma; embed senior leadership responsibility; involve people early and throughout; design participation around safety, choice and control; invest in support before, during and after involvement; recognise contributions through fair and flexible remuneration; broaden representation; build strong feedback loops; support staff with lived experience; and treat lived experience involvement as an ongoing process of learning and improvement.

1. Introduction and Methodology

- 1.1. **Resilience Learning Partnership** (RLP) works alongside organisations to help them explore and understand the role of lived experience when implementing Trauma Informed Practice. Its work includes strategic and leadership support, education and training, awareness raising sessions and a range of project work.
- 1.2. In recent years, RLP has been a national partner in the National Trauma Transformation Programme, working alongside the Scottish Government, Public Services Delivery Scotland), COSLA & the Improvement Service. This is a major long-term change programme that aligns with Scotland's vision of a trauma-informed and responsive workforce and services. The programme aims to ensure that staff can recognise where people are affected by trauma and adversity, and respond in ways that prevent further harm, support recovery, address inequalities and improve life chances.
- 1.3. Founded in 1961, **The Robertson Trust** (The Trust) is one of Scotland's leading funders working to prevent and reduce poverty and trauma in Scotland, by funding, supporting, and influencing solutions to drive social change. The Trust works with other organisations, and funds and supports third sector organisations and communities working to address these issues, building evidence to inform policy and practice. Its work includes support for longer-term transformation of the systems and services that help people facing poverty and trauma, to further improve their life chances and experiences in a changing world.
- 1.4. The Trust's strategy (2020-2030) is built on the desire for "a fair and compassionate Scotland where everyone is valued and able to flourish". It focuses on the twin challenges of poverty and trauma, recognising the "burden that these can place on the physical, mental and material wellbeing of individuals, families and communities".
- 1.5. In 2025, The Trust commissioned RLP to undertake research on 'effectively and meaningfully involving the voices of lived experience in influencing work'. RLP, in turn, commissioned The Lines Between to lead the research, working alongside the Improvement Service, which supported the design and administration of a survey. The research aimed to provide evidence:
 - To underpin The Trust's policy priorities and influencing activity, informing how they use their platform, power and voice to support other voices, namely grant holders, stakeholders, and/or those with lived experience of poverty and trauma in Scotland.
 - Of best practice, to shape how the Trust and other organisations engage with people with lived experience, promote ways in which they can have a better experience from being involved, and ensure that engagement is sensitively managed, meaningful and has the best opportunity to make a positive contribution.
- 1.6. A mixed methodology was developed to gather knowledge and experience from individuals with lived experience, professionals with experience in this area, organisations and from findings of wider research and practice. This included:
 - Three engagement events with individuals with lived experience of trauma or poverty;
 - Interviews with representatives from 14 Scottish and UK-wide organisations (see Acknowledgements) involved in developing lived experience work in different ways over many years;

- Online survey (52 returns) for individuals with lived and/or professional experience of poverty and trauma;
- Literature review;
- Analysis of results from the group discussions, interviews and survey; and
- Report writing based on the data analysed.

1.7. The research questions were based on topics proposed by The Trust. These included representation, risks and support in involving people with lived experience, and the relationship between professional experience and lived experience. The approaches which are most effective in ensuring lived experience voices meaningfully influence work, were also explored.

Report Structure

1.8. This report is structured around the following themes:

- Chapter 2: Organisational history, motivation and starting points
- Chapter 3: Structures, values and practicalities
- Chapter 4: Support for wellbeing and welfare
- Chapter 5: Staff with lived experience
- Chapter 6: The role of organisational leaders
- Chapter 7: Conclusions and recommendations

1.9. For simplicity, the term ‘lived experience’ is used throughout this report. In most cases, this refers specifically to people with lived experience of poverty, trauma, or both.

2. Organisational history, motivation and starting points

- 2.1. This chapter explores the background to organisations' involvement of people with lived experience of poverty, trauma or both, in influencing work, the motivations for doing so and the starting points in this area of activity.

Models and motivations

- 2.2. Some of the organisations engaging with this study have a long history of involving people with lived experience of poverty, trauma or both – including up to 20 years. Interviewees described significant changes within that time, with increased awareness of trauma-informed practice, and a growing focus on co-creation and co-production. Matching evidence from the literature review, organisations described a growing understanding of the need to avoid tokenism. Changes in practice reflected an increased recognition of the expertise and perspective lived experience brings.

- 2.3. Different models and approaches of involving people with lived experience were described, including:

- the establishment of long-standing 'in-house' lived experience groups who were consulted on different issues over time;
- bespoke groups formed for specific pieces of work or to consider a one-off issue;
- groups with roles including funding panels, advisory groups or policy development groups;
- organisations managing lived experience work internally or collaborating with an external partner to ensure access to specific experience of appropriate support.

- 2.4. The basis for involving people with lived experience was often around a growing awareness of the importance of service design or policy change being informed by those with direct experience. This change in practice had been brought about by the influence of leaders, the inspiration of those with lived experience engaging with the organisation and increasing examples in health and social care sectors of lived experience involvement.

Starting points

- 2.5. A fundamental starting point for organisations in ensuring the effectiveness of the voices of lived experience of poverty and/or trauma was recognising and accepting that system change needs to take place, and that the involvement of people with this lived experience is a key part of that.
- 2.6. Organisations described the need to prepare themselves for change. This involved recognising and setting aside organisational assumptions, and listening carefully to what people were saying, and being willing to act on what is heard.



“Authentic collaboration begins at the drawing board.”

- 2.7. An openness to being challenged and making changes, requires organisations to be aware of power dynamics and the need for power-sharing. This key foundational viewpoint creates potential for the voices of lived experience of poverty and/or trauma to offer knowledge which can influence change, rather than simply saying things to be reported.

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“Your leadership needs to be alert to the idea that this is going to transform the way you make decisions.”

“

“We’ve got loads of assumptions here that are not written down - they're conventions, and they're not unreasonable - but lo and behold, they all benefit only one group of stakeholders. So we had a bit of work to do behind the scenes to thin that out... otherwise we would have had a project that was trying to include lived experience in a structure that arguably wasn't fit for purpose.”

- 2.8. Genuine power-sharing was described as organisations being prepared to be flexible in the way that engagement takes place, embracing adjusted timescales if need be and “focusing on an end objective, not the way to get there”. A willingness to create new structures where people have power and can offer challenge, are also key components.

“

“It’s the meandering conversations where you get the gold dust.”

“

“Power sharing should be disruptive.”

- 2.9. There was clear agreement from survey respondents that the barriers which would most limit lived experience voices having influence were where lived experience involvement was tokenistic, a ‘tick-box’ approach, or an afterthought and where there were unsafe or disrespectful power dynamics.
- 2.10. The lived experience engagement group observations resonated strongly with these findings, identifying that power-sharing was the route to avoiding tokenism and the importance of the involvement of people with lived experience being embedded from early stages of work through to completion was recognised in the literature review.
- 2.11. The importance of a willingness for change was highlighted in one of the lived experience engagement events. Participants described an unwillingness or inability to effect organisational change as the main barrier to lived experience being used effectively, along with stigma about the inclusion of lived experience.

What barriers prevent organisations using lived experience effectively?
<i>Hearing only what they want to hear, rather than taking on criticism and working towards positive change.</i> <i>Organisations being unwilling or reluctant to change with the times.</i> <i>Large amounts of change can be scary for large organisations.</i> <i>Stigma attached to lived experience because of past negative experiences in organisations.</i> <i>Snobbery among professionals with no lived experience, or professionals with lived experience forgetting where they came from.</i> <i>Funding or policy restrictions.</i>
<i>(comments from lived experience engagement group)</i>

3. Structures, values and practicalities

- 3.1. This section explores effective processes and approaches for involving people with lived experience of poverty, trauma or both, in influencing work.
- 3.2. The lived experience engagement groups involved in this study believed the involvement of people with lived experience should be foundational as it offered a key perspective. *“It should be there from the start – having lived experiences helps professionals understand a lot more.”* The need for clear, accessible language and for expectations to be transparent were all highlighted.
- 3.3. Organisations described creating processes where **safety and predictability is built in from the start, and on an ongoing basis**. This is supported by **open, transparent conversation** and giving people the opportunity for **informed decision-making** so that any implications of involvement are fully understood.
- 3.4. Understanding and respectful approaches are also key, in terms of **appreciating the time and energy that people are contributing**. Examples of ways in which organisations demonstrated this recognition included remunerating effectively (to a suitable level) and working flexibly (to meet peoples’ needs and constraints) as well as offering choice and control.



“There needs to be budget, there needs to be resource, there needs to be skills.”

- 3.5. Providing sufficient support for people with lived experience of poverty, trauma or both to engage, requires staff to have sufficient time and capacity. **Building relationships involves an investment of time, but it is essential for developing trust and mutual respect**. This, in turn, creates the conditions for meaningful engagement. Support should enable people to thrive while offering lived experience insights. It also needs to recognise that this work needs a long-term commitment, not *“jumping in with a training or a one-off awareness event.”*
- 3.6. Participants reflected that a further element of effective engagement with people with lived experience is **feedback being sought, listened to and learnt from**, on an ongoing basis. Developing an understanding of how engagement has felt, improvements needed and feeding back to participants about contribution impact were all highlighted, and referred to in the table below.

What makes involvement feel worthwhile rather than tokenistic
• Being heard. • Feeling like you’ve been listened to. • Being looked after. • Being kept updated. • We get feedback on our work, and that makes a massive difference. • Seeing change happen. • Being paid for our time makes it feel like our time is valuable. (comments from lived experience engagement group)

Recruitment of participants with lived experience

- 3.7. Experiences of recruiting people with lived experience of poverty, trauma or both, for influencing work included open recruitment or targeted recruitment using trusted agencies which have contact with people with specific themes of lived experience.
- 3.8. A key starting point was recognising that people's experiences are not uniform and ensuring a **diverse range of voices are represented**. Organisations acknowledged that it can be difficult to balance lived experience with the skills needed to participate in influencing work. The fact that the same individuals are often involved in different groups, limiting the breadth of representation, was also noted.



"Ensure diversity of voices, so it's not the same people who become the go-to for sharing their experiences. Actively cultivate a broad network of voices."



"We have to be quite intentional sometimes to get the diversity of lived experience needed to make sure it fits with the work that we're doing."



"It's about conversations explaining that their experience is important but that it might not echo everyone's experience or thoughts. With community work there is strength in numbers and if a group of people have had similar experiences then this lends some weight to their power to argue for change..."

- 3.9. A breadth of representation was cited as way to mitigate the risk of placing unrealistic expectations on a particular group of people to represent a wider community. Ways of achieving this included creating more spaces, mechanisms and networks, to increase accessibility and improve the likelihood of people feeling comfortable about getting involved.



"We would be in touch with a community group and they'd put it out to their members and then that would snowball from there."



"Ensuring that the group is open and can be as diverse as it can be, while also drawing information, opinion and influence from wider stakeholder groups."

- 3.10. The importance of **simple and inclusive recruitment processes was stressed**. Features included:
- setting out expectations and having clear boundaries,
 - offering support
 - clearly stating the practicalities of the process,
 - ensuring people can end involvement at any time
 - providing the questions in advance of any recruitment interview and making sure all recruitment questions are relevant; avoiding any which would not provide essential or useful information to respect people's time and not exploit their experiences.

- 3.11. Another important consideration for recruitment processes is the need for organisations to **say ‘no’ as supportively as possible to minimise stress and rejection** for any candidates who are not offered an opportunity to participate.
- 3.12. Without adopting the practices described above, organisations described potential risks in recruitment. These included harm resulting from inviting people's experiences of trauma and not responding appropriately. Giving unrealistic expectations about the potential impact of involvement was described as being likely to result in negative feelings, experiences of distrust about lived experience work and unwillingness to be involved in the future.

Expectations of involvement and outcomes

- 3.13. Survey results also evidenced the need for clear, upfront conversations about expectations, boundaries, and the potential impact of sharing of lived experience. Nearly half of respondents emphasised this point. For example, organisations need to be clear about what people with lived experience can and cannot influence, while also stressing that contributions remain valuable, even when not all desired changes can be achieved. This was echoed in the engagement groups, as shown in the table below.

How can you see that your input is genuinely influencing decisions or change and what feedback loops would help build trust and transparency?
• <i>Not coming with pieces of work that have already been decided and asking people with lived experience as a tick-box exercise.</i> • <i>Professionals being transparent about whether ‘asks’ are able to happen or not.</i> • <i>Viewing completed written pieces of work.</i> • <i>Being in the spaces such as professional meetings – seeing and hearing what’s happening as a result of input.</i> • <i>Being given information about how our stories are used and how our input informs decisions – that would be reassuring and help with transparency.</i> <i>(comments from lived experience engagement group)</i>

- 3.14. Organisations highlighted the value of providing training on how policy change processes work, as well as sharing learning about what people can realistically expect as a result of involvement. This was seen as particularly effective when delivered by someone with direct experience of taking part in a similar process.
- 3.15. Survey respondents noted that making a commitment to change before involving people with lived experience of poverty, trauma or both, can help reduce the risk that input is ineffective.

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“Before engaging with people with lived experience, organisations must have a clear and precise plan of how they will do the engagement and what its purpose is. This avoids people being called on to share in a tokenistic way. Organisations must also make sure they are fully open to the experiences of people, and not have a desired outcome or preconceived notion of what the feedback will be before engaging. There should be no expectations placed on people with lived experience in terms of outcomes, this is for organisations/professionals to handle.”



“An honest, clear though careful, sensitive, compassionate conversation. Honesty is the best policy always, I think.”

3.16. People with lived experience of poverty and trauma highlighted ways to avoid creating unrealistic expectations. These included creating safe spaces that offer choice and confidentiality, along with safeguards to prevent over-exposure. Participants also emphasised the importance of wellbeing support throughout the process, as well as ongoing feedback loops, honesty and flexibility to adapt over time. Some of these perspectives are illustrated in the table below.

What helps you feel safe, respected and in control when taking part in influencing work?
• <i>Rundown of session before attending.</i> • <i>Choice of how I engage.</i> • <i>Having a variety of ways to input into the work.</i> • <i>Having my voice heard within the group.</i> • <i>Being given the opportunity to discuss our own experiences without judgment.</i> • <i>Transparency in how it will help with the work.</i> • <i>Knowing that people will come back to feedback.</i> <i>(comments from lived experience engagement group)</i>

4. Support for wellbeing and welfare

- 4.1. This chapter explores both organisational and individual perspectives on the support needed to safeguard the wellbeing and welfare of people who share insights from lived experience of poverty, trauma or both.
- 4.2. **Seeing people as people and prioritising relationships** over the work itself were seen by organisations as foundational approaches to be adopted.

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“If people are just asked in to do things and do not have a relationship - that is felt.”

“

“Having an ideological approach of not defining people by their trauma and seeing people as whole people with the unique strengths and perspectives and different skill setsand considering how we bring all of that together to contribute and add to the strength of a project.”

- 4.3. Post-recruitment, organisations stated the need to be clear about the ethics of care and the ways in which participants can be supported. Suggestions include:
- offering support to participants before meetings to go through information in advance and the opportunity to debrief afterwards;
 - offering the opportunity for participants to be accompanied by workers who know them, or a buddy system;
 - co-creating group ground rules to build understanding, cohesion and agreement;
 - creating an in-group peer support culture which appreciates the whole person;
 - striking a balance where participants can be pushed, challenged and supported as required; and
 - clearly establishing role boundaries and building in additional support for roles which the organisation itself cannot fulfil.
- 4.4. In the quote below, one organisational interviewee describes the perception of role, its limits, and the importance of recognising the support that might additionally need to be accessed.

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“I am very... open that I'm not a therapist, I'm not a professional, I'm not trained to provide mental health support. I am trained in safeguarding, I'm trained in signposting, I'm trained in various kind of sensitive research practices ...but I cannot be the person that is working with someone who is living with a serious mental health condition or is directly experiencing trauma. ...that person will need additional support...[it is important to have] very specific conversations with project partners to say what additionally needs to be in place so that folk who are involved have the support they need, or are in the right place to work with us and to work on this – whether

that's peer support, whether that's direct therapeutic support, whether that's some other kind of intervention that's in place."

- 4.5. Suggestions for support systems included considering the potential to **partner with a specialist organisation which has systems and skills for supporting people with lived experience** as well as **ensuring that in-house staff are trained in trauma-informed approaches**.
- 4.6. Thoughtful approaches to planning sessions were also described, with organisers **alert to potential triggering information and issues**. One interviewee described the organisational approach of alerting funding panel members with lived experience about potentially triggering issues which were presented in project applications. This gave panel members the choice to step away from particular pieces of work.
- 4.7. Staying true to the ethics of care when there are external pressures, demands or opportunities to engage directly with decision-makers, media or in the public political arena is important. Some organisations spoke of carefully managing external requests for lived experience involvement to ensure the safety of those involved. This helped to ensure that individuals remained in control of the extent of their contribution, rather than acceding to external demands or agendas.
- 4.8. The literature review identified the importance of remuneration and all organisations interviewed highlighted their provision of **remuneration to respect people's time and "emotional labour"**, while some described considering wider personal development budgets for wellbeing support.
- 4.9. In the quotes below, one organisation and one individual highlight the resource implications of some lived experience work and the challenges of remuneration beyond supporting the immediate time given.

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"A good practical example is somebody who has previously been in secure settings, has been asked to go and deliver training in secure settings. They can do that work, but may need a day either side of that for preparation and decompression. It costs more for that. Does the funder fund enough for those extra two days? Often the funder doesn't. So that's an example - should we incorporate a lived experience levy specific for lived experience staff to make sure that they are able to take care of themselves and be resilient in spaces when they're doing work that is potentially going to affect their mental health on an ongoing basis?"

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"To take part in sharing experiences means taking time off work and this is not possible... organisations such as mine simply could not cope properly in enabling trauma to be shared, but it could be done through key staff within the Protecting People team."

- 4.10. Survey respondents' comments resonated strongly with the organisational viewpoints (Appendix 1a). All identified the following approaches as essential or important in the support offered to people with lived experience of poverty, trauma or both:
 - principles of compassion, trust and psychological safety;

- open, honest and transparent communications;
- empowering people to share views and experiences in a way that feels right for them (i.e., flexible and individualised ways of engagement); and
- a safe physical environment.

4.11. Remuneration was also seen as important but scored slightly less than the factors above, and there was a small minority of respondents who said that providing travel expenses or childcare support were only slightly important or not important.

4.12. The creation of suitable participation environments was also a consistent message from the literature review.

Avoiding risks of retelling stories and retraumatising people

4.13. Organisations were united in not requiring or expecting people to re-tell stories of lived experience of poverty, trauma or both. Indeed, some organisations were unaware of the details of peoples' lived experience, only knowing that participants had relevant background to the opportunity they were engaged in. This experience was supported by the literature review which identified the potential that retelling stories had for being a retraumatising experience.

4.14. It was noted that the involvement of people with lived experience is not "an extractive process". Rather, the focus is to consider systems which need to be changed, with lived experience insights being a 'lens' to look through.



"There needs to be an expectation that people are there because they have expertise to contribute across the myriad of who they are – and whether or not they're going to tell their story, that's not an expectation. That's a thing that can happen, but doesn't need to."

4.15. A key part of people not needing to retell their story was the creation of trauma-informed spaces, establishing from the start, ensuring that those taking part are mindful and respectful of others' experiences – whether these are told or untold. The trauma-informed approach also includes organisations being flexible and ready to adapt and offer support, given that people's experiences can fluctuate and be context-dependent. The need for people to have the opportunity to opt out from particular discussions or information was also highlighted, or as one engagement event participation said, *"Compassion, psychological scaffolding, and the ability to pause participation."*

4.16. Given the potential sensitivity of some discussion areas and the link to participants' experience, organisations also identified the care needed around the potential blurred lines of providing a therapeutic space, particularly if the organisation has a therapeutic relationship with those involved.

4.17. These organisational comments were echoed by survey respondents. The vast majority said that the following were all essential or important steps to ensure that people with lived experience had agency and voice, without a need for them to retell their story:

- Providing safe environments and a range of flexible and accessible approaches and formats to participate through;

- Ensuring that people with lived experience know there is no requirement to tell their stories in order to participate;
- Ensuring involvement (including recruitment and ongoing support) is based on principles of trust, safety, transparency, collaboration, choice and empowerment;
- Ensuring comprehensive support structures are in place before, during and after involvement;
- Training for managers and those coordinating lived experience projects to ensure that power sharing feels meaningful and safe; and
- Reflective practice opportunities to reflect on unconscious bias, stigma and assumptions.

4.18. Feedback from a lived experience engagement session is shown in the table below, summarising elements needed to ensure positive participation and avoid a retraumatising experience.

What kind of support (before, during and after involvement) makes participation feel positive rather than draining or harmful?
• <i>The emails before help give me time to prepare or decide against joining.</i> • <i>Facilitator introduction via email before session.</i> • <i>Clear boundaries set by the group before beginning the session.</i> • <i>Reassurance that personal stories do not need to be shared.</i> • <i>We are always asked if we are OK during involvement from start to finish, which is very positive.</i> • <i>Positivity between us all and feedback on things we have suggested — the good, the bad and the ugly — true transparency!</i> • <i>We are always able to email, phone or ask any information before, during or after our involvement.</i> <i>(comments from lived experience engagement group)</i>

5. Staff with lived experience

- 5.1. Study participants were asked to consider situations where staff have both lived and professional experience of particular issues such as poverty and trauma, and the implications on organisational culture, support and leadership.
 - 5.2. Interviewees noted that some sectors have a high proportion of staff with lived experience, for example organisations working in domestic violence and violence against girls and women. As a result, workplaces can be difficult and potentially re-traumatising because of ongoing contact with people facing similar issues. One interviewee noted that this can be especially difficult for those who care deeply or who may feel that others don't share the urgency, drive or intention needed for change to happen.
 - 5.3. Staff are more likely to feel able to share lived experience insights and accepted in doing so, where organisations have a compassionate, non-judgmental, reflective, caring and open culture, supported by a workforce trained in trauma-informed approaches.
 - 5.4. Comfort in sharing lived experience of poverty, trauma or both is further enabled when support services, such as peer support groups, talking therapies, high-quality counselling, wellbeing leads, are offered. These ensure that people have the tools needed to feel well after sharing.
 - 5.5. Involvement in an influencing role, alongside a shared commitment to change, can make the sharing of personal experiences feel more meaningful for staff. Being part of a collaborative design process, as opposed to sharing lived experiences as a stand-alone activity can be more a more positive approach.
 - 5.6. Having management teams or project leads with lived experience can strengthen organisational acceptance and support, helping to destigmatise lived experience and embed it more fully in organisational structures.
 - 5.7. The survey responses (Appendix 1b) identified two most important areas of support to enable lived experience insight and professional expertise work best together: compassion, empathy and understanding from managers, and giving colleagues and staff choice in participation.
 - 5.8. Other important areas included robust support structures such as regular check-ins, safe environments, flexible working approaches, and supervision to meet individual needs as well as wider awareness raising and education across the workforce on the impact of trauma, mental health, problematic substance use and other intersecting issues.
 - 5.9. Among the many comments endorsing staff members sharing lived experience insights, there was repeat mention of potential risks for staff who are open about their lives. These focused on a potential conflict with their paid role, due to staff being perceived differently after sharing personal information. This highlighted potential vulnerability for staff if a balance of power shifted within supportive relationships which were part of their work role.
- 

“There's work to be done about how we hold humanness with professionalism.”
- 5.10. There was broad agreement on the importance of an open and accepting organisational culture that supports self-reflection, insight and opportunities to process experiences. However, staff should not be expected to share lived experience, and should be supported if this happens.

“I think when people are sharing their personal experiences in a professional setting, there's an added vulnerability there. It introduces a power imbalance of people knowing more about me than maybe I know about them. There's a risk...am I going to be defined by my experience now or rather than all my other wider experiences, skills and contributions?”

5.11. Some respondents commented that staff lived experience of poverty, trauma or both, can be an important and influential foundation for work, even if it is not shared.

“Many times, simply having the experience will be a powerful resource which informs the person's work without the need to explicitly or publicly share it. Recognising this by not compelling anyone to share their experiences or become the flag bearer for that specific traumatic experience is essential.”

“One thing that stands out to me is how powerful it is when organisations value the insight of people who both work in the field and have lived experience. This combination brings a deeper understanding of barriers, systems, and the reality of what people are facing. It helps shape decisions in a way that's practical, compassionate and grounded in real life, not assumptions.”

5.12. Relating to this area, one of the lived experience engagement groups reflected on how those with lived experience and those with professional experience could best work together. Being open, accepting and non-judgmental are key themes. Differences of opinion being handled calmly and with respect while working through challenges together humanises those involved rather than overly focusing on roles.

What does good partnership between lived experience and professional expertise look like in practice?
• Being open to learning from each other's experiences. • Working on the same level; professionals being down to earth. • No judgement and just feeling important and listened to. • Professionals speaking with, rather than to, lived experience participants. • Clear relationship boundaries. (comments from lived experience engagement group)

6. The role of organisational leaders

- 6.1. The role of organisational leaders in safely managing the inclusion of voices of lived experience of poverty, trauma or both, was explored.
- 6.2. Survey results (Appendix 1c) showed that the value of lived experience voices being embedded within policies, procedures and processes was seen as essential by the vast majority. This was also referred to in the literature review and suggests that organisational leaders' commitment to including lived experience voices needs to be rooted in internal structures on which organisational culture and practice can be built.
- 6.3. Increased training and awareness, examples of good practice being shared to demonstrate impact and ensuring consistency of language and terminology were also seen as essential or important approaches for organisational leaders to use to support this area of work.
- 6.4. A further important enabler for leaders in ensuring inclusion of lived experience voices in organisations, was creating protected time for teams and service areas to discuss the importance of this area of work.
- 6.5. People with lived experience being visible in leadership, was highlighted as a key factor in encouraging organisations in lived experience work, but it appeared that this is relatively rare.
- 6.6. Feedback from engagement events also highlighted what leaders needed to encourage lived experience work:
 - Make voices count through visible, meaningful action
 - Ensure that organisations use shared, accessible language and bridge terminology gaps
 - Provide opportunities for training and ongoing reflective practice
 - Bring decisions to life using real local stories and examples
 - Protect leaders and staff time to explore the practical application of lived experience



“A helpful starting point would be for organisations to be more humane with their workforce, to include and engage staff in improvement...to actively participate in any improvement or redesign work. Authenticity of these ways of being amongst the workforce is likely to then have an impact on how people in the workforce interact and engage with people they work with through services.”

- 6.7. The dynamic of people having multiple sources of expertise and of role – personal, professional and leadership – is described by the National Trauma Transformation Programme¹ and depicted in the image² below.

¹ <https://www.traumatransformation.scot/implementation/>

² <https://authenticvoice.scot/wp-content/uploads/2024/03/Authentic-Voice-Embedded-Lived-Experience-In-Dundee-August-2023-A4.pdf>

**Sharing power to co-create
trauma-informed change.**



7. Conclusions and recommendations

- 7.1.** This research provides two key forms of evidence. First, it identifies how The Trust can strengthen its influencing role by using its platform to amplify and act on the lived experience of poverty and trauma. Second, it sets out clear features of best practice to ensure that involvement is meaningful, safe and effective for those contributing.
- 7.2.** The study shows that influencing work involving the voices of lived experience of poverty, trauma or both, should be based on an organisational approach grounded in values, structures and relationships. Across the literature, interviews, engagement events and survey findings, there was strong consistency in what makes this work credible and what undermines it. For organisations such as The Trust, this means using its platform not only to gather lived experience insight, but to actively amplify it, challenge existing systems, and demonstrate how it informs decisions and policy positions. Meaningful involvement happens when organisations are willing to be changed by emerging information and perspectives, when people are treated as contributors of expertise rather than sources of testimony, and when participation is supported by clear purpose, trust, transparency and care. By contrast, influence is weakened where lived experience is brought in too late, used to validate pre-existing decisions, or unsupported in ways that leave people feeling exposed, unheard or are tokenistic.
- 7.3.** The findings suggest that the most important starting point is organisational readiness. Involving people with lived experience of poverty, trauma or both in a positive way requires more than goodwill: it requires leadership commitment, reflection on power, practical investment and a willingness to adapt systems and decision-making process, and the allocation of sufficient time and the adjustment of timescales accordingly. The most effective organisations described themselves as creating the conditions for influence before participation begins. This included being clear about why people are being involved, what can realistically change, how feedback will be used and what support will be available before, during and after involvement. It also meant creating environments in which people retain choice and control, are not required to retell traumatic experiences, and can see how their insight contributes to action.
- 7.4.** A second major conclusion is that meaningful involvement depends on the quality of relationships and the degree of practical care built around the work. Participants consistently highlighted the importance of being listened to, kept informed, respected and compensated appropriately for their time and emotional labour. Support was not understood simply as safeguarding in the moment, but as an ongoing ethic of care including preparation, debriefing, flexibility, accessible ways to contribute and responsive follow-up. These features are central rather than additional and should be adhered to as a basic principle, regardless of the nature and source of the request for lived experience involvement. Without these features, involvement can become extractive and can reproduce the very harms that organisations may be seeking to address. The implications of developing this model of care are that staff involved need to be appropriately skilled or have access to external skills, and this has further impacts on resources and time.
- 7.5.** The study also highlights that lived experience of poverty, trauma or both, should be understood broadly. It is relevant not only in engagement with external participants, but also in relation to staff members whose personal experience informs their work. Here too, the same principles apply: openness should never become expectation, and supportive cultures are needed if staff are to feel safe, valued and not reduced to one aspect of their identity. Likewise, leaders have a critical role in embedding lived experience within organisational practice rather than relying on individual champions or isolated projects. Where leadership is visible, reflective and willing to act,

involvement is more likely to be sustained and influential. Where leaders are defensive, unclear or under-resourced, lived experience work is more vulnerable to becoming symbolic rather than substantive.

7.6. Across the evidence, a consistent set of risks undermine meaningful involvement. These include tokenistic engagement, lack of organisational willingness to change, insufficient support structures, and weak feedback loops. These barriers are not isolated issues, but symptoms of a lack of organisational readiness.

7.7. Overall, the evidence points to a clear conclusion: involving the voices of lived experience effectively is both possible and valuable, but only where organisations approach it as long-term culture change rather than consultation alone. It requires clear purpose, honest dialogue, power-sharing, appropriate support and visible action. These findings translate into a set of practical actions for organisations, leaders and funders, to strengthen the quality, safety and influence of lived experience involvement in policy, practice and organisational development, set out as recommendations below.

7.8. Recommendations

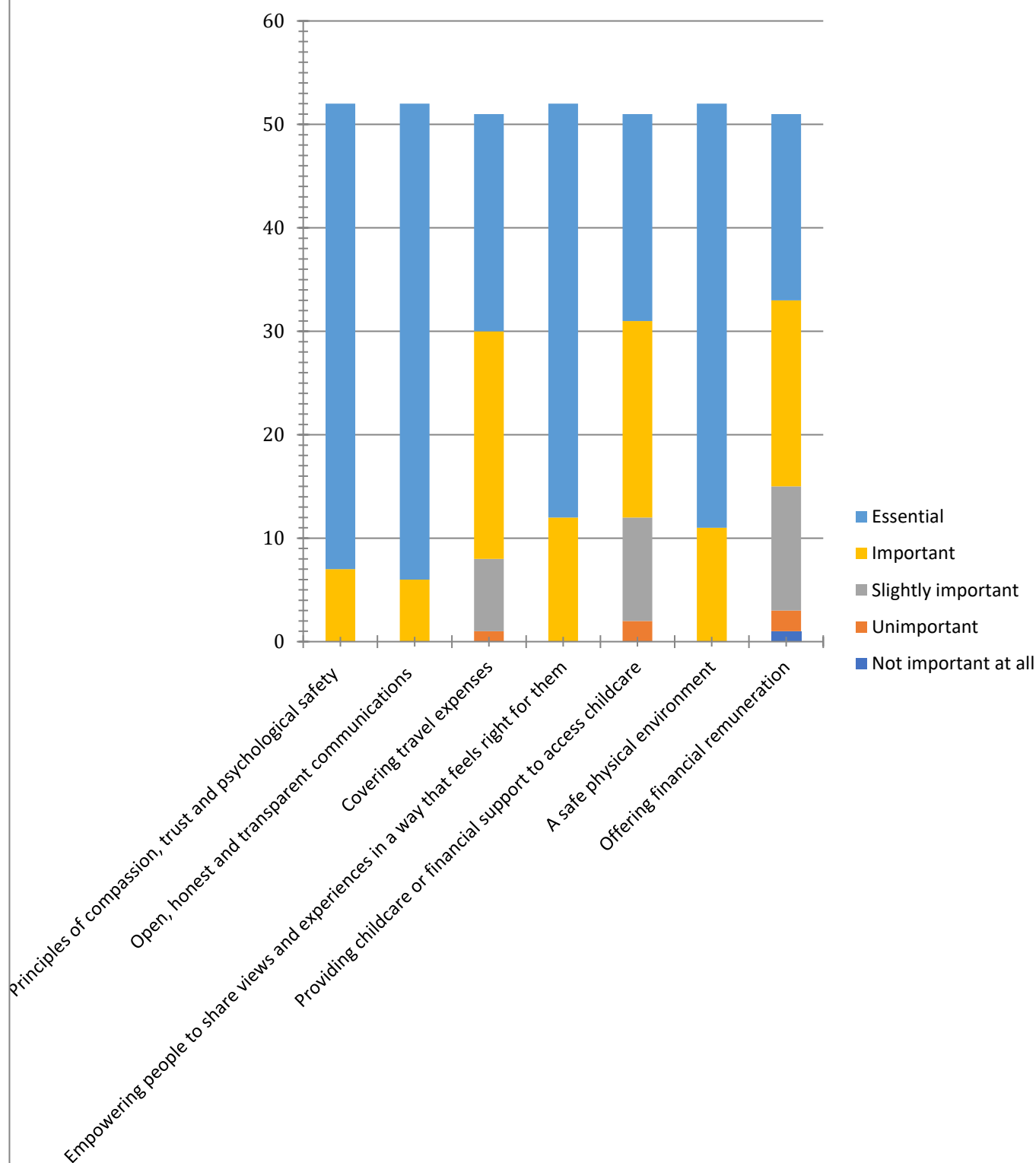
- a. **Establish organisational readiness before involving people with lived experience.** Organisations should be clear about why involvement is taking place, what decisions or areas of influence are open to change, and how insight will be acted on. This should include early reflection on power, assumptions, resources required including training and time, and internal readiness to respond meaningfully.
- b. **Embed leadership responsibility for lived experience work.** Senior leaders should visibly champion this agenda, allocate time and resources to it, and ensure that policies, procedures and governance arrangements support meaningful involvement rather than ad hoc activity. Leaders should also create reflective spaces where challenge can be heard without defensiveness.
- c. **Involve people early and throughout, not as a final check.** Lived experience should inform the design, development, implementation and review of work. Bringing people in only after key decisions have been made increases the risk of tokenism and weakens trust.
- d. **Design participation around safety, choice and control.** People should be offered clear information in advance, different ways to participate, opportunities to pause or opt out, and reassurance that contribution does not require the disclosure of personal stories. Trauma-informed practice should shape the whole process, not only responses when difficulties arise.
- e. **Invest in support before, during and after involvement.** Meaningful participation requires preparation, check-ins, debriefing and access to additional support where needed. Organisations should be realistic about what support can be provided directly, about the investment in time and money of upskilling staff if required, and where partnership with specialist agencies or trusted intermediaries may be more appropriate.
- f. **Recognise people's contribution through fair and flexible remuneration.** Payment arrangements should value time, expertise and emotional labour, while being flexible enough to take account of people's circumstances, benefits concerns, caring responsibilities and access needs.
- g. **Broaden representation and avoid reliance on the 'same voices'.** Recruitment and engagement approaches should be inclusive, proportionate and intentional, drawing on trusted relationships and varied routes into participation. Organisations should aim to widen the range of people

involved and avoid placing unrealistic expectations on any one person or group to speak for others.

- h. **Build in strong feedback loops and make influence visible.** People should be told how lived experience insights and contributions have informed decision-making, what has changed, what has not changed and why. Clearly explaining the wider context in which participants' involvement sits is important, in order that people can understand processes and timescales and likelihood and extent of influence. Seeing outcomes, even partial ones, is central to trust and to preventing involvement from feeling tokenistic.
- i. **Create supportive cultures for staff with lived experience.** Organisations should recognise that staff members may bring lived experience to work roles in different ways and to different degrees. No-one should be expected to disclose personal experience, but where staff choose to draw on it, there should be support through compassionate management, appropriate boundaries, reflective supervision and access to wellbeing support which will require additional resources.
- j. **Treat lived experience involvement as a process of ongoing learning.** Organisations should routinely seek feedback on how involvement is experienced, review what is working and where harm or exclusion may occur, and adapt their approach over time. This includes investing in staff training, reflective practice and opportunities to learn from others about what effective, ethical and sustainable involvement looks like in practice.

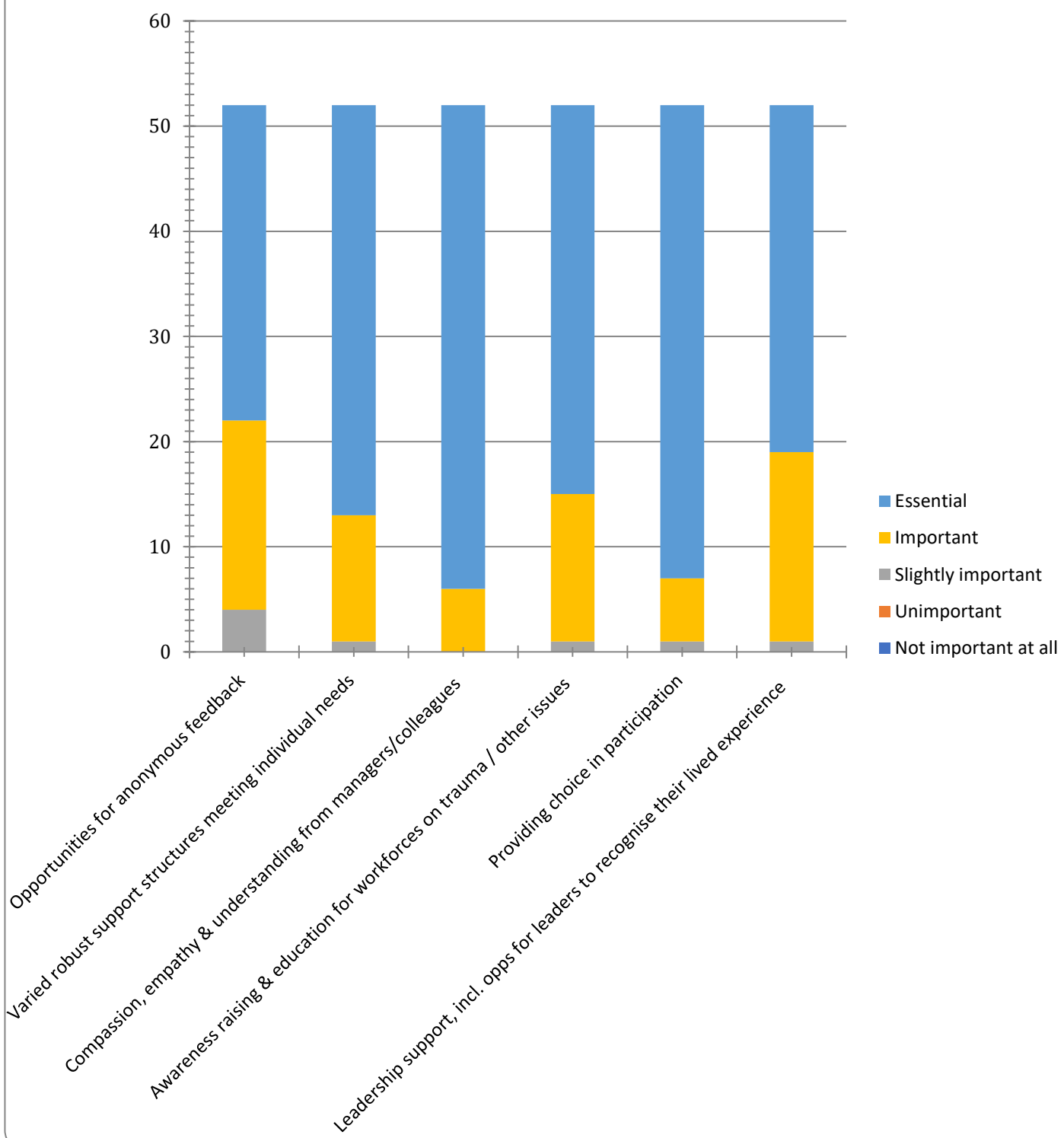
Appendix 1a Supports to ensure wellbeing and welfare

To what extent are the following supports important in ensuring the wellbeing and welfare of people with lived experience of trauma, when sharing their experience and views?



Appendix 1b Lived experience and professional expertise working well together

To what extent are the following supports important to ensure that lived experience and professional expertise can work together in a safe and appropriate way



Appendix 1c Enablers for organisational leaders to include voices of lived experience

