



# Co-producing Aged Care Services with a Wellness Focus

Part Three

Tools & Activities

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## Introduction

This document has been published by CommunityWest for aged care service providers who want to implement or improve the Wellness and Enablement focus of services and programs. The content in this document has been developed from international research on co-production and tested by ten Australian aged care providers with older consumers. It features practical tools and activities, linked to each part of the Jigsaw Model of Change Management, referred to in Part Two.

### Purpose

Co-production has the potential to make an important contribution to future challenges the aged care sector faces in Australia. This document will help you implement the Jigsaw Model of Change Management through a selection of practical tools and activities.

### Why use it

Implementing co-production is challenging and complex<sup>[60]</sup>. This document provides you with practical tools and activities to implement co-production in your organisation or project. It will support the working group to implement the principles, understand experiences of consumers, design and test new services or programs.

### How to use it

CommunityWest has developed a three-part publication for aged care services providers to implement co-production. This document is Part Three, comprising of practical tools and activities which compliments Part Two. Part One focuses on the 'what' and 'why' of co-production. Part Two is a practical toolkit, which outlines the 'how' for people leading co-production processes.

**CommunityWest recommends Part One and Part Two are read before referring to this document.**

## Tool 1: Project Planning Template<sup>[14]</sup>

### Template Instructions:

1. Identify the desired consumer outcomes
  - What are the desired outcomes of this project for the consumers and their communities?
  - Consumer outcomes are both personal and health outcomes, measurable in terms of improved Wellness and enablement.
  - Consumer outcomes may be expressed as qualitative and/or quantitative targets.
2. Identify the desired project outputs
  - What outputs are needed to achieve the outcomes identified above?
  - Outputs are immediate and direct results of the project delivery.
3. Identify the improvement goals
  - What goals are needed to achieve the project outputs?
  - Include improvements in existing services or possible new service elements.
  - Identify as many specific goals as you want, then narrow these down to two or three key goals.

The aim of this activity is to develop three statements to guide the work you do.

<b>1. Consumer Outcomes</b> What are desired outcomes for the consumers and their communities?	<b>2. Project Outputs</b> What outputs are needed to achieve project outcomes?	<b>3. Project Goals</b> What goals are needed to achieve the project outputs?
e.g. increase in social connections, autonomy or independence	e.g. communication between staff and consumers	e.g. develop specific service, tool or resource
<b>Outcome Statement</b>	<b>Outputs Statement</b>	<b>Goal Statement</b>

## Tool 5: Project Scoping Template<sup>[14]</sup>

### Template Instructions:

1. Identify the need for the project  
You can use the conversations COTA's peer information session, [Activity 1 Wellness Pebble Activity](#) or the [Tool 4 - Working Group Education Session](#) to identify what the need is, and why you want to work on this topic or idea.
2. Proposed plan and methods  
Your organisation has decided you wish to co-produce this project, using the framework and principles in this toolkit. However you will need to plan for designing, testing, implementing and evaluating your project. You will also want to discuss what methods you will undertake to do this.
3. Stakeholder involvement  
Your project's working group is already established and they will be the key stakeholders in this project. However, who else will need to be involved? Consider stakeholders for the four stages of design, test, implement and evaluate.
4. Decisions required  
Your working group will be responsible for making decisions in your project. You may want to consider what decisions might need to be made as the project progresses, and significant decisions to be made.

#### Need for Project

E.g. gaps in service, non-engagement/ uptake

#### Overview of proposed plan and methods

E.g. Using surveys, focus groups, piloting etc.

#### Need for stakeholder involvement

E.g. Who needs to be involved?  
What is their stake in the results?

#### Decisions required

E.g. Is there a commitment towards making improvements? What is the scope of the work? How will things be progressed?

### 1. Consumer Outcomes

What are desired outcomes for the consumers and their communities?

### 2. Project Outputs

What outputs are needed to achieve project outcomes?

### 3. Project Goals

What goals are needed to achieve the project outputs?



Need for Project

Overview of proposed plan and methods

Need for stakeholder involvement

Decisions required

# Activity 1: Wellness Pebble Activity

**Time Required:** 30 minutes

**Resources Required:**

- Plastic containers
- Coloured marbles or similar
- Wellbeing words

**Purpose:**

The purpose of this activity is to help your project working group identify what elements of Wellness are most important to consumers and the people you support. This activity can help identify and prioritise a potential project to co-produce. This activity was developed by Step Forward – Together™ pilot site, WestCoast Home Care (SA).

**Set the Scene:**

Invite consumers or clients to participate in an activity to discuss wellbeing. This could be facilitated through a facility, social centre or even in collaboration with COTA's peer information session on Wellness and co-production. Inform people of the purpose of this activity, in that the responses will help to guide a special project team. You could even use this opportunity to invite consumers to be part of your working group!

**Instructions:**

1. Print off the Wellbeing words on the next page. Feel free to adapt or add to these!
2. Place one plastic tub with each Wellness word.
3. Provide people with three 'pebbles' to indicate three factors they believe are most important to their sense of wellbeing.
4. Ask people to put their pebbles in the tubs
5. At completion of the activity, count the number of pebbles in each tub of Wellness to give you an indication of what matters most to people.

**Facilitator Notes:**

You can use the results to facilitate a conversation with people to explore the top 1 – 3 responses further to help you develop your co-production project concept. This activity will also give you an opportunity to find out what people are passionate about when it comes to being and staying well. This could help you identify potential consumers to approach about being involved in a co-production project.



# WELLBEING

What 3 factors do you believe are most important to your sense of wellbeing?

Rewarding work or volunteering

Faith & spiritual support

Good diet & access to healthy food

Physical activity

Good quality sleep

Community participation

Company of friends

Independence and choice



## Culture

The beliefs and values which define your co-production working group and the way you will work together.

## Tools & Activities



## Co-production of wellness services in aged care - what's in it for me?

Your Logo Here

- Co-production is a partnership between organisations which provide aged care services and the people that use them.
- The emphasis is on consumers working alongside service provider staff to review services, improve services, design new services or resolve identified problems or issues.
- It is a collective process where the needs of a diverse group of people are considered, as opposed to working with an organisation one-on-one to design your own package of care.
- The purpose of co-production is to improve individual and collective outcomes for the community and the organisation which provides services and programs.
- Co-production is an opportunity for people with lived experience of ageing to improve the experience for current or future consumers in their community.
- It is a collaborative process which not only includes planning, but also decision making and implementation.

*Co-production is very much an active, rather than passive process, which is where traditional forms of consultation normally sit. You may have been asked before to complete surveys or participate in focus groups to provide feedback to the organisation. This is not co-production. Co-production is different because although you provide feedback and insights to the organisation, you also play an active role in idea formulation and decision making. This requires both consumers and organisations to recognise the assets each individual brings to the process and collaborate on an equal footing, where power is shared between the group.*

The 5 principles of co-production are:

1. **People are assets; the skills and strengths they bring are used in the process of change**
2. **People feel there is a safe space to speak up and be listened to**
3. **People are equal partners in the process; ensuring accessibility for everyone**
4. **Everyone commits to contributing and benefits from being involved**
5. **It is clear how we make decisions**

You may have been approached by an organisation to be part of working group to design a new service or review an existing service. If you are involved in a co-production project you will be contributing your time, effort, unique perspective, ideas, and your personal skills and strengths to the process.

When you are involved in an authentic co-production process you will feel:

- You can be honest with the group and share your ideas, feedback and opinions without judgement from others
- You are equal to others in the group, including staff
- You are included in the process from beginning to end
- You are contributing to the decision making process and have an equal say
- Your contribution to the group is valued and acknowledged

For more information on co-production and wellness, visit [www.communitywest.org.au](http://www.communitywest.org.au)



Date

### Help shape and inform our service

Dear NAME

We invite you to work alongside us to make sure we are developing services which will benefit older people both now and in the future. We are looking for people who, based on their lived experience or those of a family member, would like to influence and shape the way we provide support, the information we produce and the types of services we offer.

We acknowledge as the consumer you know best what works for you, what we could be providing as well as what we currently provide which could be done better. As your service provider, we want to be able to provide a service which really improves your quality of life and by having you more directly involved, we have a greater opportunity of getting it right.

ORG NAME recognises genuine participation is about having a voice and being heard by others. The opportunity to get involved in decisions and service improvement discussions is fundamental to a person's sense of wellbeing. Where this does not happen, choice and control is compromised.

ORG NAME will be forming a working group of staff and consumers to work together. The working group we are establishing is to co-produce a \_\_\_\_\_.

Co-production basically means creating something together. It is about people with different views and ideas coming together to make things better for everyone. Co-production is about people who use services, carers and professionals working together as equals. Being equals means nobody is more important than anyone else.

We are seeking people from our local community to help shape this project and contribute to the development of \_\_\_\_\_.

The benefits of involving yourself and others include:

- improving outcomes;
- services being more responsive to needs;
- individuals and communities building a sense of ownership of services;
- consumers gaining knowledge and self-confidence; and
- policy and service quality improves.

As a consumer you will be committing to:

- attend regular meetings (frequency, days and times will be decided together once the group is formed)
- contribute to and actively influence how we \_\_\_\_\_
- provide your insights to ensure the program is meaningful to people.

If you would like further information or you are interested in participating, please contact:

#### CONTACT PERSON INFORMATION

xxx

We would love you to be involved with this project. It is a new concept for all of us so we will be learning together. Of course, in the spirit of co-production, you have the choice and control as to your level of involvement and we will support you every step of the way!

### Project Working Group Education Session

#### Session 1

Timing	Content	Resources/Activity
30 mins	Room set up	Laptop Data projector Speakers Internet
30 mins	Housekeeping Day's structure and break times Introductions and ice-breaker activity	Pack of Starburst wrapped lollies Butchers paper Markers
20 mins	<b>Project Overview BRIEF</b> <ul style="list-style-type: none"> <li>Overview of project</li> <li>The role of the Working Group</li> </ul>	
30 mins	<b>Principle 5 Wellness and Enablement</b> The focus is on delivering outcomes which promote Wellness and enablement <b>[Activity: Picture Cards]</b> <u>Group Discussion</u>	<a href="#">'80 odd years of happy' video</a> HO Wellness Wheel A5 Picture cards Butchers Paper Markers
15 mins	<b>TEA BREAK</b>	
20 mins	<b>Co-production</b> <ul style="list-style-type: none"> <li>Definition</li> <li>CW principles of co-production (This is an overview explaining the principles are what the training is based on)</li> </ul>	<a href="#">Edgar Cahn video</a> HO Co-production Definition & principles
10 mins	<b>Principle 1</b> <u>Group Discussion</u>	
30 mins	<b>Group Activity</b> <b>[Activity: Tree of Strengths or Head, Heart &amp; Hands]</b>	Butchers paper Post-it notes Coloured markers Pens
20 mins	<b>Principle 2</b> <u>Group Discussion</u>	Butchers Paper Markers
30 mins	<b>Group Activity</b> <b>[Activity: Values Cards]</b>	Values cards
30 mins	<b>Group Rules/Terms of Reference</b> <u>Group Discussion</u>	Butchers Paper
10 mins	Close and Summary ('check out')	
<b>CLOSE</b>		

#### Session 2

Timing	Content	Resources
30 mins	Room set up	
40 mins	Housekeeping Day's structure and break times Summary of previous session <b>[Activity: Co drawing]</b>	Coloured paper Markers
40 mins	<b>Principle 3</b> <u>Group Discussion</u>	Butchers Paper Markers
15 mins	<b>TEA BREAK</b>	
30 mins	<b>Principle 4</b> <u>Group Discussion</u>	Butchers Paper Markers
30 mins	<b>Principle 6</b> <u>Group Discussion</u>	Butchers Paper Markers
30 mins	<b>Decision Making Tools &amp; techniques</b> <b>[Activity: Interaction vs. Action scaling]</b>	HO Interaction vs Action
30 mins	<b>Group Rules/Terms of Reference</b> <u>Group Discussion</u>	Butchers Paper
10 mins	Close and Summary What's next – keeping momentum (Project Lead)	
<b>CLOSE</b>		



TIME		ACTIVITY	Facilitator Notes		RESOURCES
30 mins	<b>SET UP</b> Facilitator to set up room and equipment.			WB – Whiteboard BP – Butcher's Paper HO Participant Handout FG – Facilitators Guide	
<b>SESSION ONE</b>					
30 mins	<b>Welcome / Housekeeping / Purpose Group introductions</b>	Ground rules (mobiles, one person to speak at a time, all ideas are welcome etc.) Participation – key to participant's learning Ask each participant to introduce themselves	ICEBREAKER - Starburst Game - Pass a bag of Starburst around and tell everyone to take a few. Then, before they eat them ask them to share something for every Starburst. For example, something about their family for every red one, something about their plans for the future for every green one, etc. This activity can also be done with any other coloured lollies. You can write what each colour means on butcher's paper or a whiteboard so people remember the questions. <b>Red</b> – What's important to you <b>Yellow</b> – Something interesting about yourself		
			Starburst lollies BP or WB Markers		



TIME		ACTIVITY		Facilitator Notes		RESOURCES	
					<div>Pink – Your biggest success</div> <div>Orange – if you could have a super-power, what would it be and why</div>		
STEP FORWARD BRIEF PROJECT OVERVIEW							
10 mins	Short overview of the project here <ul style="list-style-type: none"><li>Overview of project</li><li>The role of the Working Group</li></ul>			<u>Group Discussion</u> <ol style="list-style-type: none"><li>What is your understanding of the project?</li><li>What are trying to achieve?</li></ol>			
WELLNESS AND ENABLEMENT							
30 mins	<p>‘Picture this’ Activity:</p> <p>Facilitator to put the picture cards out in an area which all of the working group can access.</p> <p>Ask the group to pick one of the pictures which represents Wellness for them</p> <p><b>What does being well or a good life look like to them?</b> The facilitator needs to ask the group to pick an image which best represents it for them.</p> <p>Once this has been done ask the group to go around in a circle and explain why they choose that particular image.</p> <p><b>KEY</b> - Promoting Wellness and Enablement is the project outcome.</p> <p>Link this activity to the project outcome.</p>			<p>The Wellness philosophy supports a move towards developing and implementing service delivery models which have the potential to build a person’s capacity by actively supporting them to maintain their independence and autonomy</p> <p>The Wellness philosophy asserts people have the capacity to live at an optimal level when positively supported to do so.</p> <p>The Wellness philosophy builds on a person’s individual capacity to improve their physical, social and emotional functioning while supporting them to live independently and autonomously.</p> <p>The core components of the Wellness philosophy are:</p> <ul style="list-style-type: none"><li>It looks at people’s needs in a holistic way, considering their strengths and abilities as well as difficulties experienced.</li><li>It involves people in setting their own goals and making decisions about the support they receive.</li><li>It ensures support delivered is in partnership with the consumer</li></ul>	<p><a href="#">‘Picture This’ card set</a></p> <p>(<a href="http://www.innovativeliveresources.org">www.innovativeliveresources.org</a>)</p> <p>Wellness Wheel A5 (end of document)</p> <p>Bp</p> <p>Markers</p>		

TIME		ACTIVITY		Facilitator Notes		RESOURCES
		After the activity co-produce the definition of Wellness with the group.		and does not take over activities they can do for themselves. <ul style="list-style-type: none"><li>It recognises people’s needs fluctuate over time and there are often significant opportunities for improving capacity with the right support at the right time.</li><li>It highlights the importance of social and community connections.</li><li>Learning or re-learning the skills necessary for daily living.</li></ul>		
4 mins	Sixty residents and staff at the Diana Isaac Retirement Village in Christchurch combined all their considerable talents to come up with this tribute, 80-odd years of happy. The residents wanted to show their children and grandchildren just what they're made of!		Show video to recap on what Wellness is. <a href="https://www.youtube.com/watch?v=ebD_drWVYvI">https://www.youtube.com/watch?v=ebD_drWVYvI</a>			<b>OPTIONAL</b> consider the appropriateness for the audience
15 mins	BREAK					
CO-PRODUCTION						
20 mins	No more throw away people – Edgar Cahn  Show video at the beginning of this section to help the group to understand some of the key concepts of coproduction and stimulate discussion.	<b>Debrief</b> <ul style="list-style-type: none"><li>What did you think of the video?</li><li>What do you think are the important parts of co-production?</li><li>Based on the video what do you think that co-production is?</li></ul>				Co-production definition and
	<a href="http://homecaretoday.org.au/provider/consumer-engagement/co-production">http://homecaretoday.org.au/provider/consumer-engagement/co-production</a> <i>6 minutes</i>					
	Using the A5 Handout on co-production – breakdown the definition and principles with the group.					



TIME	ACTIVITY	Facilitator Notes	RESOURCES
	<p><b>Definition</b></p> <p>Co-production is... individuals, communities and organisations working together as equals to improve experiences for people who access services.</p> <p>It requires a commitment to working collectively and collaboratively, where each person is involved in the process from beginning to end, exchanging information and power for mutual benefit.</p> <p><b><u>Discussion</u></b></p> <ul style="list-style-type: none"><li>• What do you think some of the benefits of doing co-production?</li><li>• What do you think some of the challenges of doing co-production might be?</li><li>• Are you happy to use the term co-production?</li><li>• If we don't use the term co-production what could we use?</li></ul>	<ul style="list-style-type: none"><li>• Principles of co-production</li></ul> <ol style="list-style-type: none"><li>1. <b>People are assets: the skills and strengths they bring are used in the process of change</b></li><li>2. <b>People feel there is a safe space to speak up and be listened to.</b></li><li>3. <b>People are equal partners in the process, ensuring accessibility for everyone</b></li><li>4. <b>Everyone commits to contributing and benefits from being involved</b></li><li>5. <b>The focus is on delivering outcomes which promote Wellness and enablement</b></li><li>6. <b>It is clear how we make decisions</b></li></ol>	principles (end of document)
PRINCIPLES			
10 mins	<p><b>Principle 1</b></p> <p>People are assets: the skills and strengths they bring are used in the process of change</p>	<p>The central idea in co-production is people who use services are hidden resources, with assets to bring to the process. Assets refer to skills, abilities, time and other qualities people have. This is different to the ‘dependency’ approach which focuses on people’s problems and what they cannot do.</p> <p>If people are never asked to give anything back they are wasted when the assets they have are ignored or deliberately side-lined. This means we must unleash the huge wasted resource represented by consumers, their families, and neighborhoods.</p>	



TIME		ACTIVITY		Facilitator Notes		RESOURCES	
				Social capital has been identified as an important factor in co-production. Services have to learn how to work <i>with</i> rather than <i>do to</i> consumers. Any attempt to re-design a system must also take into account how personal skills, knowledge and resource and the availability to access social capital vary from one person to another.			
30 mins	<b>The Tree of Strengths</b> Based on the conversation we had about what Wellness earlier next we want to explore what our team strengths are.		See <a href="#">Activity 6 - Tree of Strengths</a>		Post-it notes BP Markers Pens		
OR							
30 mins	<b>Gifts of the Head, Heart &amp; Hands</b> Based on the conversation we had about what Wellness earlier next we want to explore what our personal gifts are.		See <a href="#">Activity 8 - Gifts of the Head, Heart &amp; Hands</a>		BP Markers Pens Post-it notes		
20 mins	<b>Principle 2</b> People feel there is a safe space to speak up and be listened to. <u>Group Discussion</u> What do you think is required as a group to ensure you feel there is a safe space to speak up and feel listened to?		Genuinely interactive relationships are based on trust, mutual respect, openness and personal responsibility. Co-production aims at establishing a meaningful dialogue between the service provider and the people who access services. On the consumer’s side, the dialogue must go beyond expression of wants and opinions. They must be ready, willing and able to listen, reflect, consider options and accept change. On the service provider’s side, they must be responsive to the consumer, respectful of		BP Markers		



TIME		ACTIVITY		RESOURCES	
30 mins				their views, and flexible in their approaches.  <b>Trust</b> is the starting point for a meaningful relationship. Without it there will be no willingness to engage in meaningful dialogue and the relationship will stall. <b>Mutual respect</b> ensures that there will be give and take. <b>Openness</b> encourages self-examination, weighing of evidence, willingness to compromise and the search for new opportunities and solutions. A sense of <b>personal responsibility</b> is necessary to ensure that the dialogue is not just about talk; but that both parties will seek to understand their roles and fulfil their responsibilities. The four factors of trust, mutual respect, openness and personal responsibility are equally reinforcing and as the relationship evolves, will strengthen and enrich one another.	Values activity Hand out values cards to each table. Ask each participant to choose two values which are important to them. Discuss choices with partner. <b>(Why did they choose those values? What does this value look like in action? How will I know when I see it?).</b> Ask “what are values?” WB answers. Possibilities could include: <ul style="list-style-type: none"><li>• something we hold dear</li><li>• a strong belief</li><li>• a principle</li><li>• some measurement of worth</li><li>• different for each person</li></ul>
				This section engages participants in self-reflection to explore their own values, and the values which underpin how we will work together. It explores some of the challenges participants may face and the types of values people might manifest in their work under this philosophy.  Personal values are crucial to the way people work. Everything that is said and done is underpinned by a person's ethics and values which is translated into speech and action. Person-centred thinking is about values – namely what each worker believes and thinks about the person they are working with. Changing negative beliefs and perceptions into positives can radically change consumer outcomes. Person centred planning is about, 'getting a life not getting a service'.  Simmons triangle shows the majority of a person's attention needs to target identifying their own ethics and values and determining how this impact on their professional practice rather than simply developing a service delivery or support plan which is not grounded in an empathic	Values cards These can be purchased online: <a href="http://www.virtuesproject.com">www.virtuesproject.com</a> <a href="http://www.lighthouseresources.com.au/bookshop/cards/the-values-cards/">http://www.lighthouseresources.com.au/bookshop/cards/the-values-cards/</a>  WB/BP Markers

TIME		ACTIVITY		RESOURCES	
10 mins		<b>Close and Summary</b>	understanding of the person being supported. <ul style="list-style-type: none"><li>Recap on the session</li><li>Ask participants how the session went - allow time for feedback</li></ul>		
SESSION TWO					
10 mins		<b>Welcome /</b> Housekeeping / Purpose Day's structure and break times Summary of previous session	Ground rules (mobiles, one person to speak at a time, all ideas are welcome etc.) Participation – key to participant's learning		
30 mins		<b>Co-drawing Activity</b>	See <a href="#">Activity 2 - Co-Drawing</a>	Coloured paper & markers	
20 mins		<b>Principle 3</b> People are equal partners in the process, ensuring accessibility for everyone. <u>Group Discussion</u> <ol style="list-style-type: none"><li>How can we make this project accessible to everyone? E.g. how can we involve others in conversations</li><li>What does it mean to be equal?</li><li>How does it feel to be equal?</li><li>How can we ensure everyone in this room is treated as equals? E.g. wearing plain clothes only, not uniforms etc. What does that look like?</li><li>What are the common elements of a partnership? How can we replicate that in this group?</li><li>What are some barriers to equality and partnership?</li><li>How will we know if we are doing it?</li></ol>	Co-production has to have equality at its heart. It can only be true to its principles if it is backed by measures to make sure everyone has the capacity to participate on equal terms. This is partly because it fosters equal partnership between 'providers' and 'users' of services, and affords equal value to different kinds of knowledge and skills, acknowledging everyone has something of value to contribute. It is also because, in order to be effective, it must enable everyone to participate, not just those who are already more able, articulate and socially advantaged. Hence developing co-production forces us to think about the underlying causes of inequality and how these can be tackled, and embrace very different ways of framing participation. Equality can only be achieved with a shift in power towards people who use services and carers. Co-production shifts the balance of power, responsibility and resources from professionals more to individuals by involving people in the design and delivery of services. It recognises people are not merely 'recipients of services', but are the very resource which can turn aged care services around.	BP Markers	



TIME		ACTIVITY		RESOURCES	
15 mins		<b>BREAK</b>			
20 mins		<b>Principle 4</b> Everyone commits to contributing and benefits from being involved <u>Group Discussion</u> <ol style="list-style-type: none"><li>What are people able to contribute to this project? E.g. attending meetings, facilitating, recording minutes etc.</li><li>What sort of commitment do you think the project needs from everyone to be successful?</li><li>What do you want to do and what do you not want to do?</li></ol>		BP Markers	Reciprocity is a key concept in co-production. It is defined as ensuring people receive something back for putting something in, and builds on people's desire to feel needed and wanted. This idea is linked to 'mutuality', where all parties involved have responsibilities and expectations [60]. Your project may want to consider offering people a range of incentives to get involved in the process which will enable them to work in a reciprocal relationship with professionals and each other [41].
					Co-production goes well beyond the idea of 'citizen engagement' and 'service user consultation' to foster the principle of equal partnership, putting an end to 'them' and 'us'. Inclusion and accessibility are important values in co-production. Access and inclusion is the cornerstone of equality, and co-production cannot happen if processes and practices are not accessible to everyone. Accessibility must be a consideration for each co-production activity you undertake. It is important to ensure information and meeting places are accessible. As well as this, accessibility needs to flow through the whole process of each co-production meeting or event. People need to be able to easily prepare for, get to, and be heard. They then need to be able to follow progress through minutes and reports. In order for this principle to be applied, ensure the co-production process is accessible to everyone involved.



		<ul style="list-style-type: none"> <li>Recap on the session</li> <li>Ask participants how the session went - allow time for feedback</li> <li>What's next (<i>Project Lead</i>)</li> </ul>	
--	--	--	--

30 mins	<b>Establishing a group contract</b> Based on the discussion that we have had around our values and what is important to us:  What do we want our guidelines to be for working together?	BP Markers	Group discussion on how the group will work together. See Page 25 of the toolkit for more information.
	patience for the extra time needed to have inclusive conversations. Encourage the more discussion-orientated people to be willing to move on to decisions and actions [37].  <b>Group Discussion: How are these dynamics going to affect decision making in our group?</b>	<div> <div>Discussions</div> <div>Relationships</div> <div>The journey</div> <div>How people are interacting</div> <div>Feelings, social &amp; emotional needs</div> <div>Planning</div> <div>Process</div> </div> <div> <div>Decisions</div> <div>Tasks</div> <div>The destination</div> <div>What gets done</div> <div>Goals and outcomes</div> <div>Doing</div> <div>Action</div> </div>	BP Markers



TIME	ACTIVITY	Facilitator Notes	RESOURCES		
	<div>4. What are you getting out of being involved in this project/what are the benefits for you? If that was to stop would you still be in the Working Group?</div> <div>5. How will this project benefit other consumers? (not just about personal agendas)</div> <div>6. What is the benefit of this project for the organisation?</div>				
10 mins	<div><b>Principle 6</b></div> <div>It is clear how we make decisions</div> <div><u>Group Discussion</u></div> <div>1. What's important to how we make decisions?</div> <div>2. How are we going to make decisions together?</div>	<div>Co-production is not about handing over control and decision making entirely to consumers, but about the service provider and consumers making decisions together. This principle is about agreeing how decisions are made, having transparency in decision making, and clarity around what has been agreed or decided.</div> <div>A common problem with community engagement occurs because only a small number of people dominate decision-making, accentuating power imbalances between professionals and consumers.</div> <div>In order for this principle to be applied, ensure everyone involved has enough information to take part in decision making. You will need to create an environment within your Working Group where new possibilities are explored, and decisions are potentially made differently than what you're used to.</div>	<div>BP</div> <div>Markers</div>		
20 mins	<div><b>Interaction vs. Action Scaling Activity</b></div> <div>Ask people to complete a scaling activity of where they sit on the interaction vs. action scale. Discuss this with the group about why they chose their position on the continuum.</div> <div>Encourage the more action-orientated people to have</div>	<div>There are two dimensions to co-creative collaboration – interaction and action, both of which are equally valuable to the co-production process. Some people find discussion and the way in which the work is accomplished more engaging, while others are drawn to making action plans. The differences and contributions of each are:</div> <table><tr><td><b>Interaction</b></td><td><b>Action</b></td></tr></table>	<b>Interaction</b>	<b>Action</b>	<div>Interaction vs. Action (end of document)</div>
<b>Interaction</b>	<b>Action</b>				



### Co-production is...

Individuals, communities and organisations working together as **equals** to improve experiences for people who access services.

It requires a commitment to working **collectively** and **collaboratively**, where each person is involved in the process from **beginning to end**, exchanging **information** and **power** for **mutual benefit**.



### Our principles of co-production

1. People are assets: the skills and strengths they bring are used in the process of change
2. People feel there is a safe space to speak up and be listened to.
3. People are equal partners in the process, ensuring accessibility for everyone
4. Everyone commits to contributing and benefits from being involved
5. The focus is on delivering outcomes which promote wellness and enablement
6. It is clear how we make decisions





### **Recognises Skills and Abilities**

The Wellness Philosophy recognises and emphasises a person's skills and abilities. This helps maintain or build their self-confidence and feeling of being valued.

### **Promotes Independence**

Support is tailored around a person's strengths and abilities, and maintains their physical, social and psychological independence.

### **Stay Involved**

It is important to encourage people to continue to perform the tasks they are able to manage, and ensure their existing skills are maintained. The Wellness Philosophy enables people to maintain their existing routines, activities and social connections.

### **Try Something New**

Sometimes after a period of ill-health, injury or inactivity, a person may be less able to do some of the things they used to do. The Wellness Philosophy believes a person can regain strength, knowledge and skills with support and encouragement, exercise and practice.

### **Maintains Autonomy**

The Wellness Philosophy encourages a person to continue to make informed choices and be in control of their own life.

### **Supports Community Connections**

Long periods of loneliness and isolation can have a negative impact on physical, mental and social wellbeing. Connections to family, friends and community networks can have a positive impact on a person's overall health.



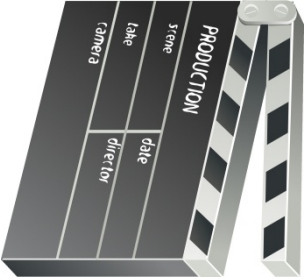
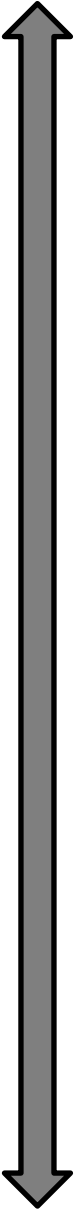


Interaction Vs Action

Where do you sit?

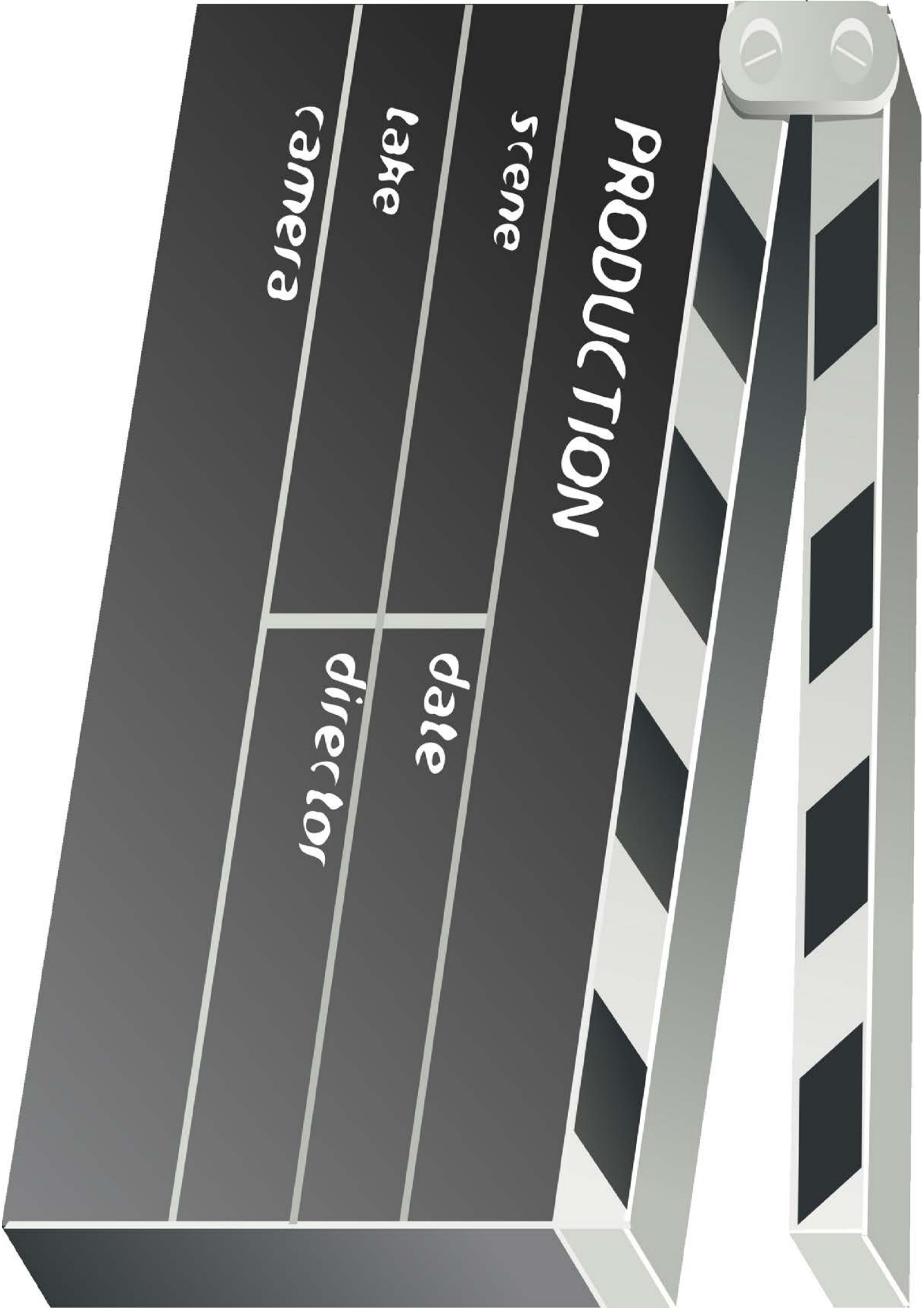
There are two dimensions to the work we will do in this project – interaction and action, both of which are equally valuable. Some people find discussion and the way work is done more appealing, while others are drawn to making action plans. The differences and contributions of each are:

Interaction	Action
Discussions	Decisions
Relationships	Tasks
The journey	The destination
How people are interacting	What gets done
Feelings, social & emotional needs	Goals and outcomes
Planning	Doing
Process	Action





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## Activity 2: Co-drawing

**Time Required:** 15 minutes

**Resources Required:**

- Coloured paper, 4 colours for 4 rounds of drawing
- Coloured markers, pens, textas, pencils etc.
- Timer

**Purpose:**

Drawing together helps practice working in collaboration with others and can stimulate discussion about their preferred way of working. This activity can also help people to access the creative side of their brain; this is particularly useful if the group is 'stuck' for solutions. This activity is fun, engaging and an effective ice-breaker and team building activity.

**Set the Scene:**

This activity is fun and creative and will result in laughter, play and positive experience for all. Ask people to access their creative and silly side, to have fun with this activity and enjoy the experience.

**Discussion Questions:**

At the end, the facilitator asks for a show of hands for which round was people's favourite. There will often be a balance in a group of people who like to lead, to follow, to co-create or improvise.

**Facilitator Notes:**

This activity is extremely powerful in explaining what co-production is and gives people an experiential insight. Explain to people Rounds 1 and 2 are traditional methods of service delivery; Round 3 is consultation (as you don't really have a voice in the end outcome of the drawing), whereas Round 4 is true co-production, as you discuss, decide and do together. Notice also how you had more time for Round 4? This is because co-production takes more time than other forms of consumer involvement.

This exercise gets people who rarely draw to be visual which sparks a new way of thinking. And even if their pictures are often a little silly, the responsibility for their creation is shared.

**Instructions:**

1. Invite people to pair off with somebody, preferably someone they don't know very well e.g. staff and consumer.
2. Tell the group their job is to draw four pictures together over 4 rounds.
3. Ask each person to take a different coloured pen from their partner; they will use this for the 4 rounds of drawing.

**Round 1 (2 mins)**

Ask each pair to take a coloured piece of paper. Inform the group one person in the pair will take the lead and tell the other what to draw. They have 2 minutes to complete their drawing. Once the time is up, go around the table and ask each pair to share their drawing with the group.

**Round 2 (2 mins)**

Ask each pair to take another piece of coloured paper, different to Round 1. Inform the group they will now swap roles, so whoever was leading in Round 1 is now drawing and vice versa. They have 2 minutes to complete their drawing. Once the time is up, go around the table and ask each pair to share their drawing with the group.

**Round 3 (2 mins)**

Ask each pair to take another piece of coloured paper, different to the previous rounds. Now inform the pairs they will be drawing something together, however they are not allowed to talk in this round. Remember, no discussions – just start drawing and see what happens! They have 2 minutes to complete their drawing. Once the time is up, go around the table and ask each pair to share their drawing with the group.

**Round 4 (3 mins)**

Ask each pair to take another piece of coloured paper, different to the previous rounds. Now inform the pairs they will be drawing something together again, and this time they will need to discuss, decide and draw together. They have 3 minutes to complete this round. Once the time is up, go around the table and ask each pair to share their drawing with the group.





## Activity 3: Life Highlights

**Time Required:** 30 minutes

**Resources Required:**

- Butchers paper
- Markers (optional)

### Purpose:

This activity allows team members to understand each other's passions and personality and identify common life experiences. The first part of the activity enables participants to reflect back on their lives, while the second part (i.e. the review section) enables group members to get to know each other.

### Set the Scene:

Inform the group this activity is designed to be non-threatening and shared in a safe place with friends. Inform members it is entirely up to them what they choose to share with the group. This activity will require everyone to recall and share life highlights, which can include personal or shared moments; pertaining to professional success, personal revelations, or exciting life adventures.

### Instructions:

Ask each person to close their eyes for two minutes and consider the best moments of their lives.

After they have had a moment to run through their life highlights, keeping their eyes closed, ask each participant to take a moment to decide which moment of their life they would re-live if they could.

Ask each group member to share what their chosen moment entailed and why they chose it.

### Discussion Questions:

How may your experiences and life moments help with this project?

Which life highlights was similar in the group?

What do these similarities mean for how we will work together?

Which life highlights was different in the group?

What do these differences mean for how we will work together?

### Facilitator Notes:

You may wish to record the discussion on butcher's paper to be displayed at future meetings.

Source: <http://www.toolkit.100open.com/discoveringnewideas/co-creation-techniques>



## Activity 4: Personal Objects

**Time Required:** 20 minutes

**Resources Required:** Butchers paper, markers (optional)

### Purpose:

The purpose of this activity is for the team members to get to know each other and build rapport. You can also focus this activity around your project and ask people to bring something which represents their interest in being involved.

Alternatively this activity can be used as an icebreaker as team members are getting to know each other.

### Set the Scene:

Inform the group this activity is designed to be non-threatening and shared in a safe place with friends. Inform members it is entirely up to them what they choose to share with the group. This activity can support the group to find common interests and create cohesion. Members will recognise some of the accomplishments, values and/or characteristics of members which will support team building.

### Instructions:

Prior to the next meeting, ask each working group member to bring along an object which is personal to them and they feel comfortable speaking about.

Each person gets 1 – 2 minutes to introduce themselves, describe their object and explain why they have brought it. This explanation should touch on what the object is, and why it is important to them.

### Discussion Questions:

Once each member has shared, the group may wish to ask each other questions about their object e.g. how long they have had it, how/where they acquired it, its significance to them etc.

### Facilitator Notes:

You may wish to record each person's object, contribution, accomplishments, values and characteristics on butcher's paper, and even accompany with photos of the person and/or their object. These could be displayed at the each meeting until the group is formed and strong relationships have been built.

Source: <http://www.toolkit.100open.com/discoveringnewideas/co-creation-techniques/>







## Activity 5: Thank you for the gifts <sup>[42]</sup>

**Time Required:** 20 - 30 minutes

**Resources Required:**

- 1 blank card per person
- Pens

### Purpose:

The purpose of this activity is to help group members identify and acknowledge specific skills or gifts people bring to the team. Sometime people are unaware of the skills they possess. When team members acknowledge each other's skills, it is a powerful attribution which serves to build group relationships. This activity works best once the group have met as few times and know a little bit about each other.

This activity is also particularly useful if members lose sight of the contributions and gifts each person brings.

### Set the Scene:

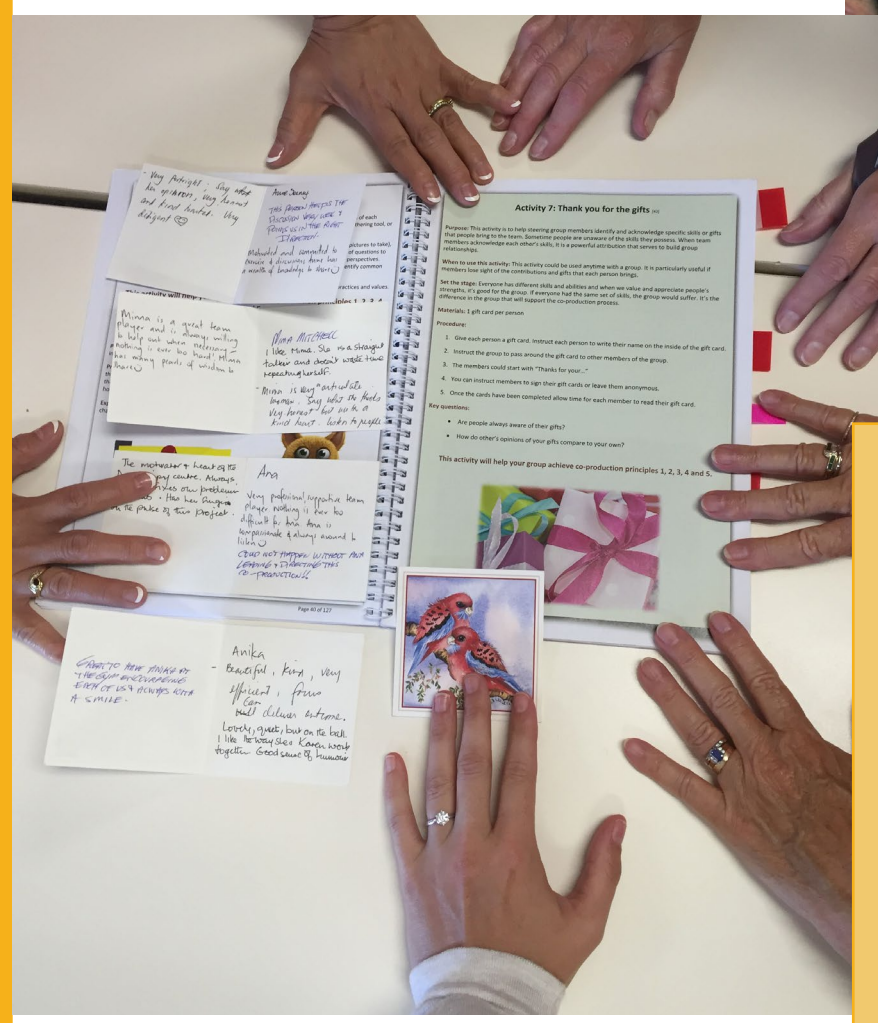
Co-production is an asset-based approach where the skills, knowledge and expertise of each person are valued and utilised. Everyone has different skills and abilities and when we value and appreciate people's strengths, it's good for the group. If everyone had the same set of skills, the group would suffer. It's the difference in the group which will support the co-production process.

### Facilitator Notes:

Each person can keep their card; and ask them to bring it with them to every meeting. As the group becomes closer, newly recognised gifts can be added.

### Instructions:

1. Give each person a blank card. Instruct each person to write their name on the inside of the gift card.
2. Instruct the group to pass around the gift card to other members of the group.
3. The members could start with "Thanks for your..."
4. You can instruct members to sign their gift cards or leave them anonymous.
5. Once the cards have been completed allow time for each member to read their gift



### Discussion Questions:

1. Were you surprised what other people recognised in you?
2. How do other's opinions of your gifts compare to your own?
3. How is this useful to identify and acknowledge people's assets?





## Activity 6: Tree of Strengths <sup>[42]</sup>

**Time Required:** 30 minutes

### Resources Required:

- Image of tree trunk and branches, printed on to large white paper e.g. A3 or A2
- Coloured post-it notes
- Pens
- Butcher's paper and markers (optional)

## Purpose:

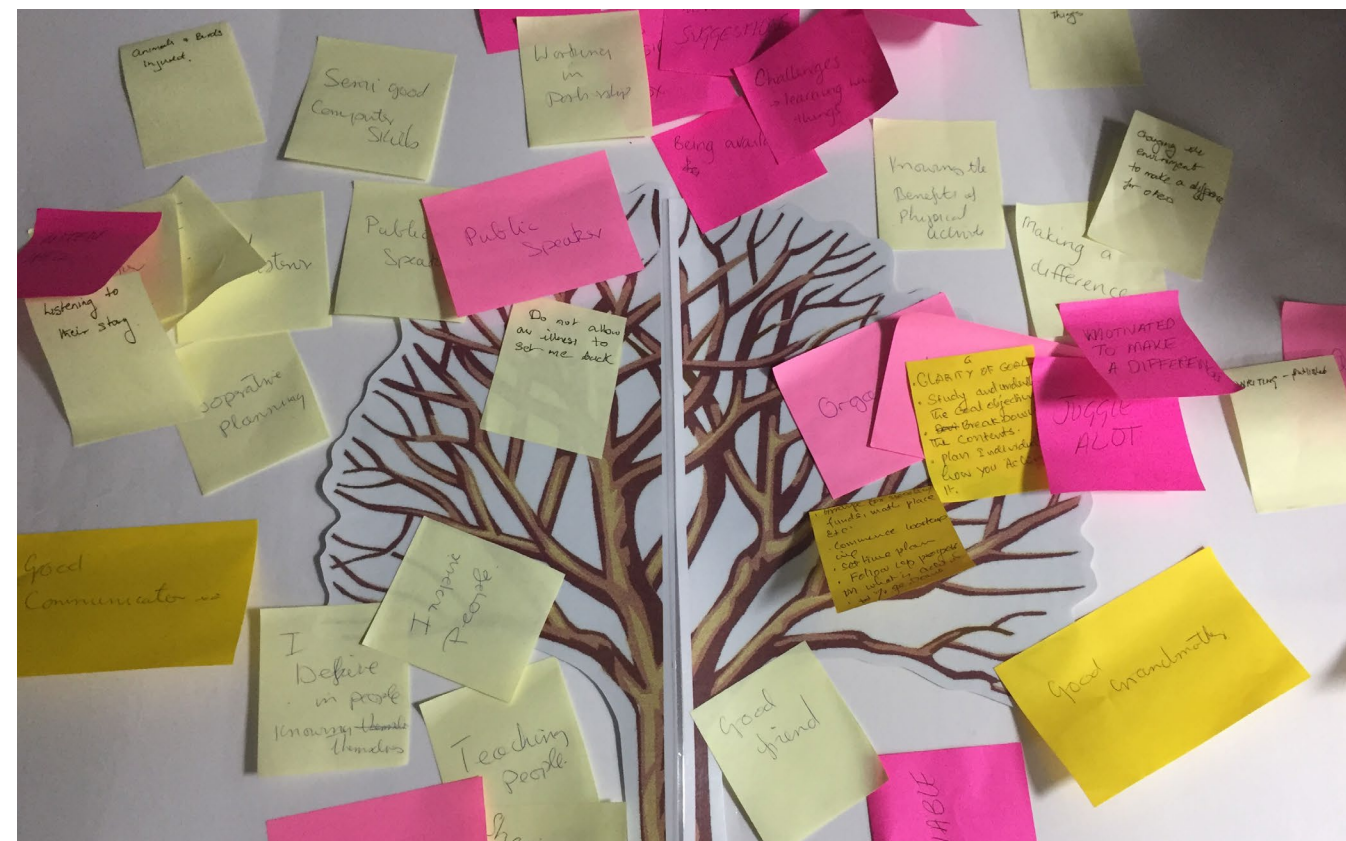
The purpose of this activity is to help group members identify and acknowledge specific skills and strengths people bring to the team and to discuss how these assets can be utilised to complete their project. When a team identifies its assets and strengths it can use these to solve problems and interact. This activity is best used when the group needs to learn more about each other. It can support team building and culture.

## Set the Scene:

Co-production is an asset-based approach where the strengths, interests, skills, knowledge and expertise of each person are valued and utilised. Everyone has different skills and abilities and when we value and appreciate people's strengths, it's good for the group. If everyone had the same set of skills, the group would suffer. It's the difference in the group which will support the co-production process. Explain that individuals all have strengths and weakness, and so do teams. When a group can understand what their strengths are this can leverage the success of their project.

## Facilitator Notes:

If the group identifies important skills or strengths missing for the project, you may want to discuss who could be invited to support the project that has what the group needs. They could be invited into the working group or invited to be part of the project as required.



### Instructions:

1. Hang the large tree branch on the wall, where people can easily view and access it
2. Ask people in the working group to pair up e.g. staff and consumer
3. Provide each pair with 5 post-it notes each a pen
4. Ask the pairs to discuss what they feel their top 5 personal skills and strengths are and how they can help the group achieve the project objective – allow 15 minutes for this
5. Ask each person to write 1 strength or skill on the post-it notes. Each person should end up with 5 completed post-it notes
6. Once complete, ask people to stick their post-it notes on the picture of the tree, with the post-it notes symbolising the leaves of the tree
7. Once everyone has done this, ask the group to read all the skills and strengths the group has

OPTIONAL: Ask the group to categorise similar strengths and skills on the tree to identify 5 team strengths the group has. Record these on butchers paper and display clearly for the group to see

## Discussion Questions:

1. How can these skills and strengths impact how we work as a group?
2. How will all of these help us achieve our project?
3. Are there any skills or strengths missing that we think we might need for this project?
4. Are there skills that people want to improve or gain throughout this project?



## Activity 7: Trading Places <sup>[42]</sup>

**Time Required:** 15 - 20 minutes

**Resources Required:**

- Wellness case study – written, audio or visual
- Coloured hats with 'Support Worker' or 'Client' – enough for 1 hat each person (optional)



**Purpose:**

The purpose of this activity is to help group members gain a better understanding of one another. This exercise will require professionals to change places with consumers, and vice versa. Its important people see the world from other's point of view. The dynamics of the group will change when everyone sees each other as equal and this can support changing the shift of power dynamics for the purpose of co-producing.

**Set the Scene:**

We all work in different roles, sometimes it can be hard to see from other people's perspective. Using a Wellness case study relevant to your organisation ask the professionals and consumers to trade places with one another. Wellness case studies can also be found on the [CommunityWest website](#).

**Instructions:**

1. Provide the scenario to the group, ask members to get into smaller groups of 2 - 4 people.
2. Prior to discussing the case study ask the members to figuratively trade places with each other – this is where the hats can be useful
3. Allow time for the group to work through the scenario.
4. Ask them to consider the situation and problem from their new perspective
5. Ask them to work together to come up with solutions to the issue.
6. Ask each group to report back what solutions they came up with.

**Discussion Questions:**

1. Was this easy or difficult?
2. What did people learn from trading places?
3. What do you think is the benefit of trading places?

**Facilitator Notes:**

Staff might find this activity slightly easier than consumers. Consumers may need support to consider this new perspective. It might be helpful to explain some general parameters for staff, based on the Wellness case study chosen. E.g. Duty of Care, policies and procedures, rostering etc.



## Activity 8: Gifts of the Head, Heart & Hands

**Time Required:** 30 minutes

**Resources Required:**

- Coloured post-it notes
- Pens
- Butcher's paper and markers (optional)

**Purpose:**

The purpose of this activity is to help group members identify and acknowledge specific skills and strengths people bring to the team and to discuss how these assets can be utilised to complete their project. When a team identifies its assets and strengths it can use these to solve problems and interact. This activity is best used when the group needs to learn more about each other. It can support team building and culture.

**Set the Scene:**

Co-production is an asset-based approach where the strengths, interests, skills, knowledge and expertise of each person are valued and utilised. Everyone has different skills and abilities and when we value and appreciate people's strengths, it's good for the group. If everyone had the same set of skills, the group would suffer. It's the difference in the group which will support the co-production process. Explain individuals all have strengths based on the head, heart and hands. When a group can understand what their strengths are this can leverage the success of their project.

Source: <http://faithinaction.net.au/toolbox/tools/asset-mapping/>





### Instructions:

1. Stick 3 pieces of butcher's paper up, displaying head, heart and hands respectively.
2. Ask people in the working group to pair up e.g. staff and consumer
3. Provide each pair with coloured post-it notes and a pen each
4. Ask the pairs to discuss:
5. What knowledge do you have and who do you know? (head)
6. What are you passionate about? (heart)
7. What do you really like doing? (hands)
8. Ask each person to write 1 head, heart or hands gift on the post-it notes. Each person should end up with at least 3 completed post-it notes
9. Once complete, ask people to stick their post-it notes on to the corresponding butchers paper
10. Once everyone has done this, ask the group to read all the skills and strengths the group has  
OPTIONAL: Ask the group to categorise similar gifts to identify 5 team strengths the group has for head, heart and hands. Record these on butchers paper and display clearly for the group to see

### Discussion Questions:

1. How can these gifts of the head impact how we work as a group?
2. How can these gifts of the heart impact how we work as a group?
3. How can these gifts of the hands impact how we work as a group?
4. How will all of these help us achieve our project?

Source: <http://faithinaction.net.au/toolbox/tools/asset-mapping/>



## Practice

How the people in the project carry out the co-production work.

### Tools & Activities

# Ice-Breaker Activities<sup>[37]</sup>

## Staggered Arrival Questions

This activity is useful if people arrive at different times. Those who are early or on time can become frustrated if the meeting does not begin on time. To put people at ease and to get them involved as they arrive, use directions or questions posted visibly for them to see as they enter the room. People can work in pairs or small groups. Some suggestions for staggered arrival directions or questions are:

- Introduce yourself to two people you do not know and discuss what brought you here.
- What have we already accomplished, or what are we proud of, related to our project?
- Why is this project/topic important to you?
- What are some outcomes you want to see from today's meeting?

## My name is?

Go around the group and ask each person to state his/her name and attach an adjective which not only describes a dominant characteristic, but also starts with the same letter of his name e.g. Generous Grahame, Dynamic Dave. Write them down and refer to them by this for the rest of the meeting.

## Newspaper Puzzle

Divide the group into small teams and give each group a copy of the same newspaper. Ask them to spread the newspaper out in front of each team. Describe a particular advert, article, fact or picture from the paper and the group has to find it, rip it out and bring it to you. The first team to bring it gets a point. Continue calling out items and the winning team is the one with the most points. Watch the paper fly.

## Connecting Stories

Divide the group up into 4 - 5 people. Ensure each group has several post-it notes and pens. The goal of the game is to connect mini-stories in an interesting way. Each person must share at least one item that connects to the other mini-stories. The longer the chain of items that can be created, the better. Write down a few words on a post-it note to keep track of each part of the story. The first player begins by sharing an interesting memory or experience they have. For example, "One day I locked myself out of the house and had to spend the entire day at the coffee shop". Another person can tell a related story that has similar themes or elements to the previous story. For example "I am a total coffee addict, I drink 3 cups of coffee a day and I can't sleep well at night". The next player, based on the previous story shared, can say something related, for example "I don't sleep much at night because I stay up late on the computer." To help the group remember each part of the story, write

a few words on a post-it note for each part of the story chain. The more interesting or funny the story is the better. At the end of the game, the group with the longest story chain is the winner. This activity is a fun way to get people to share stories, whilst discovering similarities and common interests.

## Fabulous Flags

This activity is useful to help people convey what represents them or is important to them. Each person draws a flag which contains symbols or objects that symbolise who they are or what they enjoy. You will need sheets of paper, pens, and coloured pencils/crayons/markers. Give people 15 - 20 minutes to create their flag and then share its meaning with the group. As an additional activity, you can ask everyone to brainstorm ideas on what your group or co-production project flag could be. Everyone could draw different parts of the flag and create it together. Alternatively, you can collect the individual flags and create a 'quilt' of individual flags, signifying unity.

## Most Unique

Go around the room and have each person share something that makes them different from anyone in the group, like, "I've never left the state I was born in" or "I am one of ten kids".

## Personal Scavenger Hunt

Take five minutes and find the following items in your wallet or purse: Something that:

- you've had a long time
- you're proud of
- reveals a lot about you
- reminds you of a fun time

Have each person share the first item. Go around again on the second item and again until you have gone through each one.

## What's your story?

The simple art of sharing stories is a great way to reconnect with old memories, honour special moments, learn more about others and turn strangers into friends. Start by asking each person to choose a card and allow some time for people to ponder the question or statement.

Go round the group and ask person to share their story based on the card they picked. This could be done a number of times and you could even ask people to bring a prop to help them tell their story.

You can purchase cards like this facilitate this activity, or create your own.

Check out [Innovative Resources](#) storytelling cards as an example.



# Facilitation Phrases <sup>[37]</sup>

## Acknowledging

- "It sounds like... is important to you."
- "Am I correct in hearing that your experience with... has been...?"

## Encouraging

- "Can you tell me more about...?"
- "We have heard from several of you. I am wondering if someone we haven't heard from has something to say about this."

## Clarifying

- "Can you explain more about...?"
- "Can you give me an example of...?"
- "I would like to understand your idea, but I'm a little unclear about..."

## Reflecting or Empathising

- "When he said... it sounds like you felt..."
- "It sounds like you have concerns about..."
- "It sounds like you have a need to..."

## Validating

- "It sounds like you want to make that..."
- "I hear that it is very important to you that..."

## Summarising

- "Let me see if I understand what you said. What I think you said was \_\_\_\_\_ is that correct?"
- "You have made a number of points. Let me try to briefly summarise what I heard you say."

## Reframing

In response to a negative comment such as, "no one ever follows through on tasks", you could re-state it in a more positive way, such as, "Would I be correct in saying that you want some assurance that people will complete the tasks assigned to them?"

## Changing Topics

- "I am noticing the conversation shifting to a new topic. Is the group ready to move on, or is there more about the previous topic we need to discuss?"
- "I am conscious of time and what we want to discuss today, can we 'car park' this for now?"
- "If we are ready to move on, can we take a moment to summarise what we have discussed so far?"

## Group Guidelines not being followed

- "In the beginning, we agreed to speak one at a time. Is that something we want to revisit at this time?"



# Good Discussion Questions <sup>[37]</sup>

The kinds of questions you ask to get people talking can have a huge impact on the quality of the conversation. It is important to use thoughtfully crafted questions to invite fresh thinking, create energy, and stimulate new and unexpected combinations of ideas and insights. Before the meeting the Facilitator will need to generate possible discussion questions based on the discussion topics. This could be done in collaboration with the Project Lead or members of the Working Group. Once your questions are developed, it may be useful to assess them against the following:

- Does it generate hope, imagination, creativity and new possibilities?
- Will it catalyse new thinking?
- Is it easy to understand?
- Is it focused enough?
- Is it within the influence of this group?

Some examples of questions you can ask are below:

## To identify shared vision or goals

- How would an ideal future look?
- What are the shared goals?

## To identify common ground

- What are the common themes?
- What seems to be emerging from the answers?
- What are the mutual interests?
- How can the various ideas be integrated?
- How are the ideas related?

## Brainstorm Ideas

- What are some alternatives?
- What are some ways to accomplish the shared goal of...?

## Action Planning

- What would a satisfactory solution need to include?
- What are some ways this group could solve that?
- What would help the group move forward on this?
- How might an action plan be structured that would respect and include the various needs that have been expressed?
- How could the group support each other in moving forward?
- Who will do that?
- When will that be done?

Once you have your discussion points or questions, it is important to hear the perspective of everyone in the room so you build an expansive understanding of the opportunities to improve your service and complete your project. A great way of doing this is a 'go-around' where you give each person a chance to share how they see the topic<sup>[66]</sup>. Other techniques you can use include timelines of past events, a mind map, or flowcharts<sup>[66]</sup>.

My skills and experiences been utilised

I have been given the opportunity to take on additional responsibilities

If not, would you like to take on additional responsibilities? (please detail below)

I am sufficiently involved to properly influence the project

Comments:

## Tool 6: Co-production Checklist

Project working group members can use this checklist which is related to the six principles of co-production. You can use this checklist at the conclusion of each meeting, or at pivotal points throughout the project. This tool is useful to ensure the principles of co-production are maintained throughout the life of the initiative. If any gaps are identified, an action should be put into place by the Project Lead to resolve any issues.

You can use this form template attached or feel free to adapt this tool and employ other methodologies to the same effect. For example, you could ask working group members to do a show of hands at the end of each meeting, however be aware this would not be an anonymous process, which might result in skewed responses.

Other options could a traffic light system, where people indicate with green, yellow or red dots. Green indicating 'yes' and agreement, yellow indicating 'maybe' or inconsistent application of the principle, red would indicate this is not happening and is a gap requiring immediate attention.

Feel free to adapt this tool as you see fit, however ensure the questions relate to the six principles of co-production and are not leading.

This tool was developed by The Society of Saint Hilariion, pilot site in the Step Forward – Together™ project.



I feel my voice has been heard and my opinions valued

My experience and views have been taken into account

I feel I can speak my mind with this group and won't be judged

I don't judge others views and opinions and respect the difference in the group

Group members are following the group's terms of reference and contract

I feel I am supported in my role in this project

Comments:

Yes / No

Yes / No

Yes / No

Yes / No

Yes / No

Yes / No

2. People feel safe to speak up are listened to



3. Equality and accessibility

I feel everyone is equal and no-one's voice is more important than anyone else's

The power is shared and staff don't have more power than consumers in the group

I feel the group is working together well, there is no 'them' and 'us'

The meeting venue is accessible for me

I have been able to attend the meetings at a reasonable time of day and for reasonable periods

The reading materials are easy to understand

My preferences for communication about project progress have been satisfied

Comments:

Yes / No

Yes / No

Yes / No

Yes / No

Yes / No

Yes / No

Yes / No

I am working well with others in this group  
Yes / No

The group has discussed issues and topics relevant to the project  
Yes / No

I have been asked to contribute and am contributing to my capacity  
Yes / No

If not, would you like to contribute more or in other ways to the project?  
Yes / No

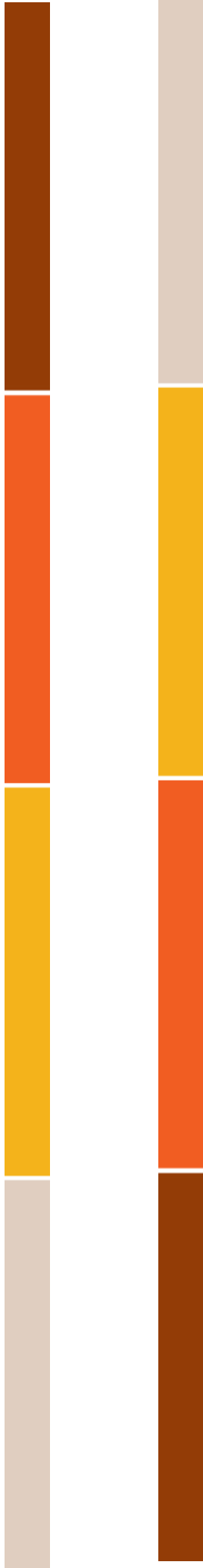
I am benefiting from being involved in this project *(please detail below)*  
Yes / No

There is a focus on issues important and relevant to me  
Yes / No

There is a focus on issues important and relevant to others in my community  
Yes / No

Comments:

4. Commitment and benefits



5. Promoting Wellness and wellbeing

I am aware of the purpose of this project  
Yes / No

Progress is evaluated by looking at actual changes in people’s lives  
Yes / No

There was an opportunity to discuss the pros and cons of the project  
Yes / No

I was included in the development of the project concept and plan  
Yes / No

The work we are doing will improve wellbeing for people in the future  
Yes / No

My wellbeing has improved as a result of being involved with this project *(please detail below)*  
Yes / No

The service will improve as a result of this project  
Yes / No

Comments:



# Activity 9: Life Snapshot

**Time Required:** To be decided by project working group

**Resources Required:**

- Disposable camera, digital camera, smart phone or tablet
- Diary
- Question cards (optional)
- Inspiration cards (optional)

**Purpose:**

The purpose of this activity is to give the project working group information about specific aspects of people’s everyday life, needs and experiences. This can be used as a general information gathering tool, or can be focused according to a specific theme or task, relevant to your project.

**Set the Scene:**

In order to understand a perceived problem or an opportunity to do things differently or better, we first have to understand the stories of the people who have the relevant experiences. Stories help us to collect information, foster a deeper understanding, and most importantly provide context to situations and events.

**Instructions:**

1. Identify people who are willing to complete this activity
2. Provide people with a package including a camera, a list of pictures to take, inspiration cards, diary, and questionnaire cards. The questionnaire cards can have a list of questions to complete which will give insight into a particular issue or topic from a range of different perspectives.
3. Give people a set timeframe to complete this activity e.g. 1 week
4. Once this information is collected and brought back to the group it can be analysed to identify common themes, preferences, routines, activities, practices or values.

**Discussion Questions:**

1. What do these stories tell us about people’s preferences, routines, activities, practices or values?
2. How can this information inform our project?
3. Have we identified common themes which we now need to explore more?
4. If so, how will we do this? E.g. interviews, focus groups, phone survey etc.



## 6. Making decisions

I was actively involved in deciding how the group would make decisions	Yes / No
The group is staying true to the agreed decision making process	Yes / No
Conflicts and disputes have been resolved effectively	Yes / No
The aims and responsibilities are clearly defined	Yes / No
I understand my role in the project and feel it is valued by the group	Yes / No
I am satisfied with how the group make decisions	Yes / No
I am satisfied with the decisions the group has made so far	Yes / No
Comments:	



# Activity 10: Post-it Session

**Time Required:** 15 mins – 1 hour (depends on focus of activity)

**Resources Required:**

- Pens
- Butchers paper or white-board

**Purpose:**

The purpose of this activity is to understand relevant topics, themes, possibilities, motivations and challenges to gain insight in the person’s everyday situation and/or environment.

Post-it note sessions can be used for:

Process Analysis: Lets you analyse a process or problem to find ways to simplify or understand a problem.

Conflict resolution: Provides a potentially anonymous method to voice concerns and safely discuss issues in the group without blame or judgement.

Brainstorming: Methods for generating new ideas – recombining, adding, subtracting

Check out this book for more ideas on using post-it notes for problem solving - [Rapid Problem Solving with Post it Notes](#)

**Set the Scene:**

This is done as a facilitated activity with one facilitator per group. This can be done with one group of people or a larger group comprising of many smaller groups.

**Instructions:**

1. Provide people with post-it notes, pens and discussion topic(s)
2. The facilitator makes sure the person’s points of view in relation to topics are noted on post-its.
3. Stick post-it notes to butchers paper or a whiteboard. Completed post-it notes

can then be organised and re-arranged to identify common themes or patterns in people’s responses

4. The activity can be organised so people are mapping out their activities in a normal day, their challenges, motivations and ideas for how to improve the service they interact with or just their everyday environment <sup>[46]</sup>.

**Examples from Step Forward – Together™ pilot site, Jubilee Community Care (QLD)**

Over time the committee have developed mutual respect for other’s opinions and ideas. Good outcome for all involved.

After a few meetings we worked together well and achieved a good outcome.

Very good outcome has resulted. Committee went through a ‘frustrated’ stage, but are now happy with the process. Now meetings are working being chaired by one person who is informal and well mannered.



# Tool 7: Four Box Template <sup>[14]</sup>

## Template Instructions:

- 1. Brainstorm consumer experiences: With your group, brainstorm adjectives, e.g. confident, and adverbs, e.g., quickly, to describe consumer’s experiences. Insert these into Box 1. When you have finished Box 1, move on to Box 2. Use Box 2 to clarify and sharpen the experiences.
- 2. Brainstorm consumer outcomes: With your group brainstorm any outcomes you believe are important for consumers, their families and friends, and their communities and insert these into Box 3. When you have finished Box 3, move on to Box 4. Use Box 4 to clarify and sharpen the outcomes
- 3. Review the content: When you have finished all four boxes, review the content. Develop promise and outcome statements in ordinary, simple, clear language.

1

How do consumers want to experience the service?  
How do they want to feel during service delivery?  
e.g. confident, in control

2

How don’t consumers want to experience the service?  
How don’t they want to feel during service delivery?  
e.g. afraid, dont have any choices

3

What outcomes do consumers and communities want?  
e.g. more independence, return to ‘normal’ lifestyle

4

What outcomes don’t consumers and communities want?  
e.g. lack of independence, uncertainty

1

2

3

4

# Activity 11 - Collages

**Time Required:** 1 hour (depends on focus of activity)

**Resources Required:**

- Images and words
- Glue
- Scissors
- Butchers paper or white-board

**Purpose:**

The purpose of this activity is to provide a graphic/narrative representation of current or future scenarios. Collages are used for discovering emotions, feelings, or wishes. They are abstract and allow people to express themselves which relate to how they envision current or future experiences. The materials needed for collages are generally composed of a maximum of 150 images and words, and should be abstract enough to elicit communication without guiding the participants in any way.

[47]

CommunityWest have provided a selection of stock images organisations can use to create collages, however feel free to obtain your own images, specific to the project purpose.

**Lighthouse Resources sell 'picture this' cards which can be used to create collages.**

Here are a few rules of thumb for what to include in a collage set:

- a balance of positive and negative images and words,
- a balance of abstract and concrete images and words,
- both natural as well as man-made things, and
- people of all types: male and female, young and old, racial balance, etc.

For more information and to see an example of collages used in co-production [click here](#).

**Set the Scene:**

Collaging is ideal for activating feelings and memories, as well as for dreaming. A collage exercise might give people a workspace divided into two halves, one for current service experiences, and the other for dreaming about the service in the future.

**Instructions:**

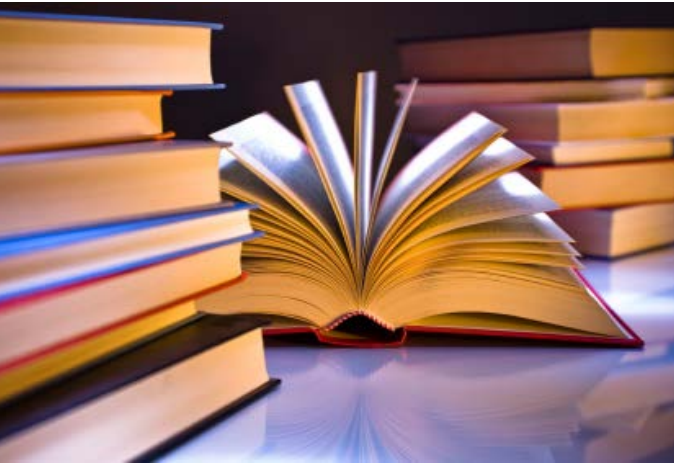
1. Identify the theme or purpose of the collage activity
2. Provide people with plenty of images, words, scissors and glue
3. Ask people to create their own collages or a larger group one
4. Explore the emotions, feelings, themes and imagery in relation to the topic















## Activity 12 – World Cafe

**Time Required:** 20 mins - 1 hour (depends number of tables)

**Resources Required:**

- Butchers paper
- Markers

**Purpose:**

The purpose of the World Café is to facilitate open and intimate discussion, and link ideas within a larger group to access the “collective intelligence” in the room.

**Set the Scene:**

The room should be arranged in four tables/zones with equal sized groups and the maximum possible diversity of perspectives/experience within the groups should be ensured. Each table has one chairperson (who remains at the same table throughout) and is asked to focus on a different question related to the project theme.

Individuals are encouraged to write or doodle on butchers paper so when people change tables they can see what previous members have expressed in their own words and images.

**Instructions:**

Each group has four consecutive discussions (timed and typically twenty minutes each) with groups rotating after each round. Each table builds on the outputs of the previous group as follows:



**Round 1 - Brainstorm Ideas/Propositions**

To begin with delegates are invited to work on their own and in silence by capturing their responses to the question post-it notes. After five minutes they then take it in turns to share their responses.

**Round 2 - Build & Cluster**

The chairperson begins by summarising the main points emerging from Round 1. They invite the group to build on the contributions of the previous team, in particular focusing on adding any points that didn’t come out of the previous round. The group are asked to cluster the responses into some emerging themes (session target is 5-10 big themes).

**Round 3 - Build & Prioritise**

The chairperson begins by summarising the main points emerging from Round 1 and 2. They invite the group to build on the contributions of the previous team, in particular focusing on adding any points that didn’t come out of the previous rounds. The group are then asked to prioritise the emerging themes in order of importance.

**Round 4 - Sense-Check & Select**

The chairperson begins again by summarising the main points emerging from Rounds 1, 2 and 3. The group is invited to build on the contributions of the previous team, in particular focusing on adding any points that didn’t come out of the previous rounds. The group is asked to check the rationale and thinking of the previous three groups and, if it hasn’t already become apparent by this stage, select the top three suggestions to work on at the next stage.

# Tool 8: Storyboard Guide<sup>[14]</sup>

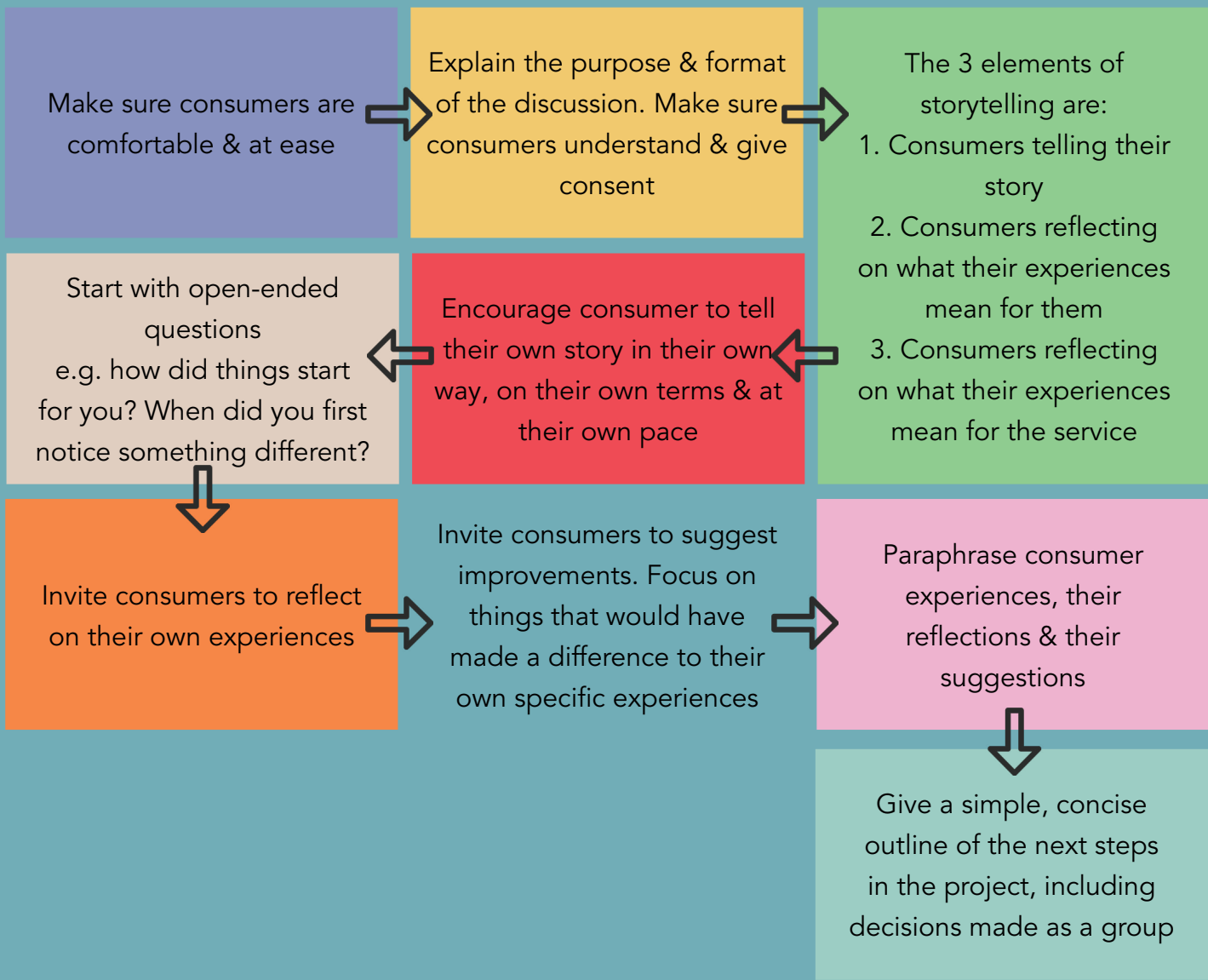
## Template Instructions:

Storyboards are used to describe a series of events or steps in a journey. They are a good collaborative tool to imagine future or ideal experiences from start to finish. Some materials for storyboarding in co-production sessions include drawing supplies and storyboard templates which guide the participant without being prescriptive. Other materials include additional collections of icons, images, and symbols.

Depending on the stage of the project and the discussion questions, some storyboards are presented to the participants with some pre-defined elements. For example, the facilitator might have illustrated some steps already but the participants need to add conversations and text explanations on each slot, or vice versa<sup>[47]</sup>.

**For more information and to see an example of storyboards used in co-production [click here](#).**

Check out [Lighthouse Resources](#) and [100% Open Innovation Toolkit](#) for some useful tools.

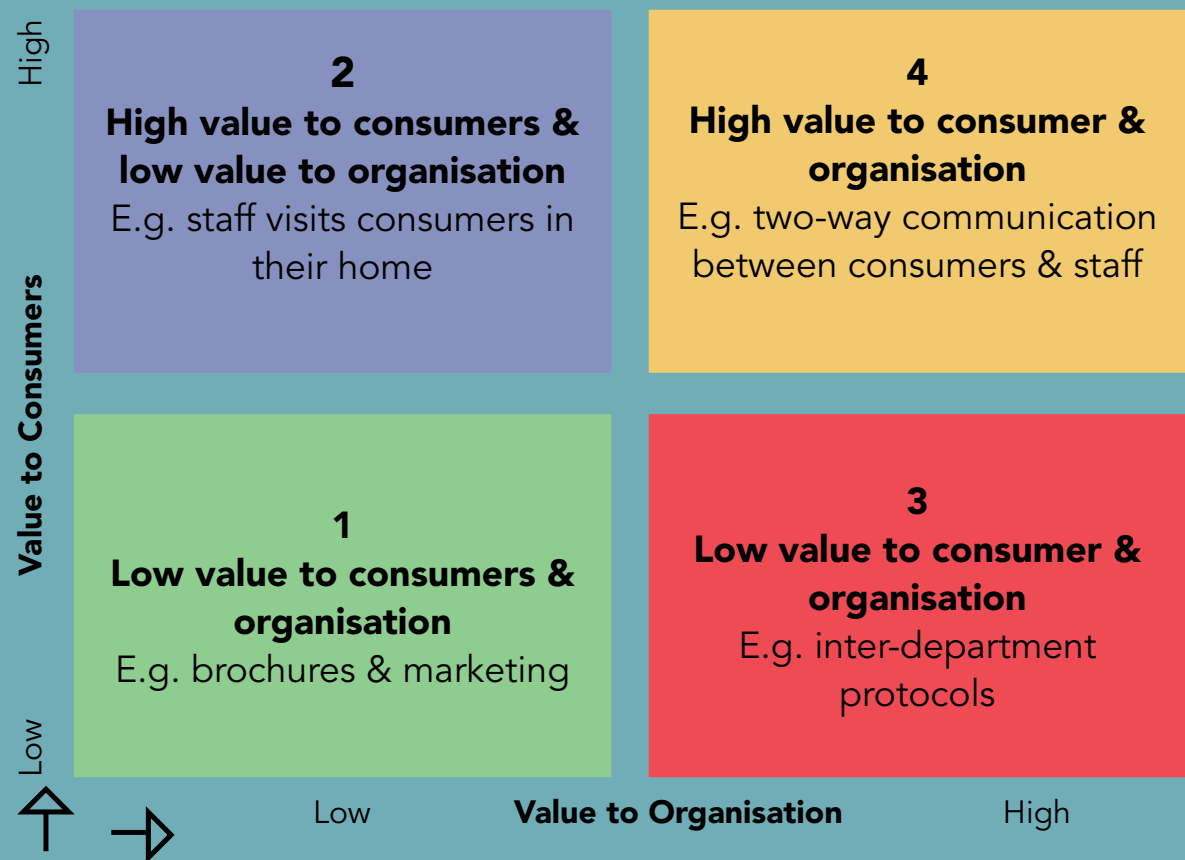


# Tool 15: Touchpoint Mapping Template

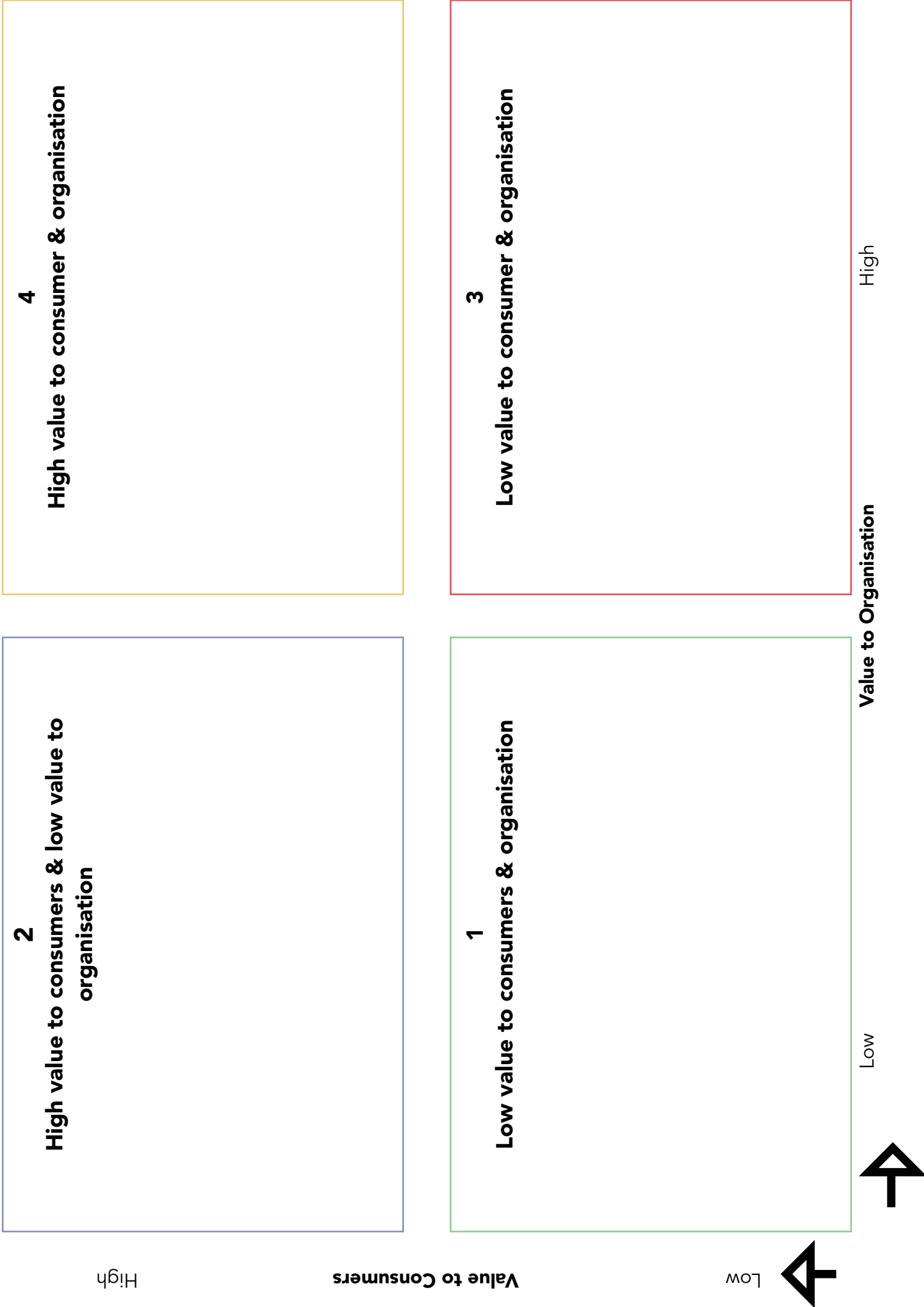
A touchpoint is any point of contact consumers have with your service. Touchpoints may be tangible or provide tangible evidence of service. The idea behind this tool is to provide a framework which enables your project to “connect the dots of the consumer experience” in order to see the different contexts and results of the interaction with your service.

## Template Instructions:

1. Summarise what you know so far about the consumer journey. Start with good and bad consumer experiences. For each experience, note the actions which contribute to it, then any relevant improvements. Note: this might take a few sheets of paper.
2. Identify possible touchpoints. Identify existing and/or possible touchpoint ideas. These touchpoints may be:
  - the way service is currently delivered or
  - ways it could be delivered better.
3. Analyse. Analyse each touchpoint idea for its value to both consumers and your organisation. To do this, simply take each touchpoint in your list and position it on the diagram below.
4. Identify which touchpoints to focus on. Shortlist the higher value touchpoints (Boxes 2 and 4) and prioritise those in Box 4. These are your hotspots for immediate attention.







# Tool 12: Future Improvements Template<sup>[14]</sup>

The purpose of this activity is for the working group to start with a vision and to brainstorm the problems, needs, challenges, and ideas on how to solve them. The group will need to brainstorm about problems in everyday life in relation to a specific topic/problem. This will turn the problems into opportunities and a vision for the future<sup>[46]</sup>.

Improvement Idea 1		
<b>1</b> Who is it for?	<b>2</b> Why it works for them	<b>3</b> How it works for them
<b>4</b> What can go wrong?	<b>4</b> How can it be fixed?	<b>4</b> How might it be improved?
Improvement Idea 2		
<b>1</b> Who is it for?	<b>2</b> Why it works for them	<b>3</b> How it works for them
<b>4</b> What can go wrong?	<b>4</b> How can it be fixed?	<b>4</b> How might it be improved?

Tool 11: Improvements and Benefits Template<sup>[14]</sup>

Improvement Ideas

Benefits to Consumers

Benefits to other  
stakeholders

**1**  
Who is it for?

**2**  
Why it works for them

**3**  
How it works for them

**4**  
What can go wrong?

**4**  
How can it be fixed?

**4**  
How might it be improved?

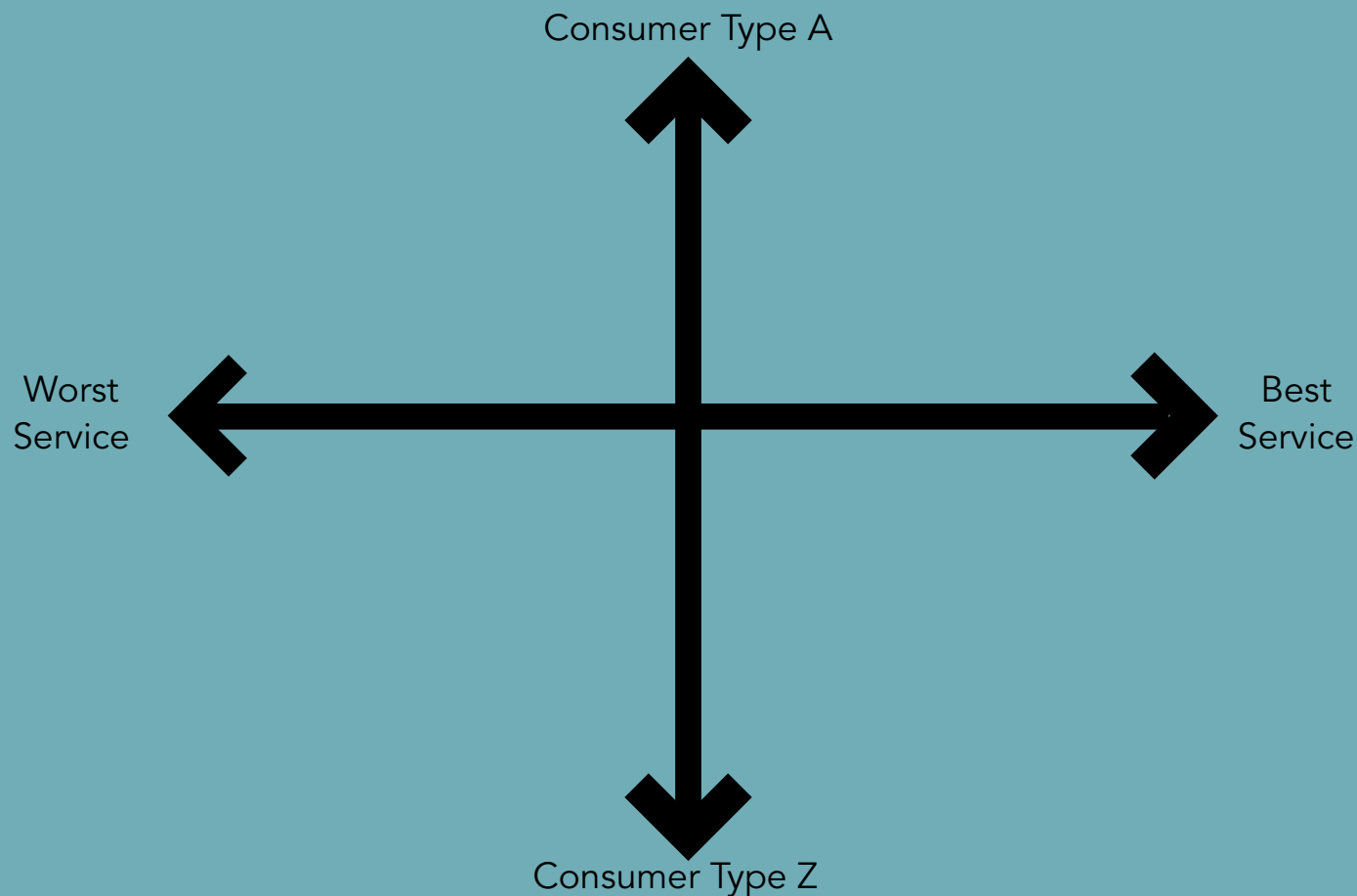


# Tool 9: Scenario Template<sup>[14]</sup>

A scenario is a realistic description of how a service works. A persona is a realistic description of a type of consumer. Scenarios and personas work best when based on realistic ‘extremes’. They help you notice and amplify experiences that otherwise go un-noticed. They also prevent you defaulting to the ‘average’ consumer or ‘average’ service delivery, which inevitably leads you to making merely ‘average’ improvements! Scenario and persona descriptions help you determine exactly who your improvement needs to work for as well as when, where and how it needs to work to be successful. This tool can also be used to create ideal and desired scenarios.

## Template instructions:

- 1. Identify the issue you wish to explore. Identify worst and best service extremes of the issue. Give each one a short, easy name.
- 2. Identify two extremes of consumer types. Name these too.
- 3. Combine your extremes of service delivery and consumers into scenarios. Give these scenarios names.
- 4. Plot these on the diagram. Try to have one in each quadrant. For example, you might combine a worst service with a consumer type.
- 5. Flesh out each scenario with details.
- 6. Introduce the improvement into each scenario and experiment with them!
- 7. Document your learnings as you go.



# Tool 10: Stakeholder Needs Template<sup>[14]</sup>

You can use this tool to compare one stakeholder’s needs against those of another. For example, consumer’s needs and ideas can be identified and compared to managerial, clinical and other stakeholder needs. You may have identified potential improvements before your project starts. As a result, this may inadvertently exclude other stakeholders’ needs and useful improvement ideas. This tool helps build a balanced view of potential improvement areas and improvement ideas.

## Template instructions:

- 1. Using a large whiteboard or sheet of paper, list the needs of the key stakeholder group (usually consumers) across the top. Then list the needs of another stakeholder group down the side.
- 2. Work across and down the empty squares in the table, placing a tick in each one where stakeholder needs clearly coincide (it doesn’t matter how many ticks there are). Then number each tick.
- 3. Using a separate sheet of paper for each, brainstorm specific improvements for that square from the perspectives of both stakeholders, noting its benefits for each stakeholder alongside. You can use [Tool 11: Improvements and Benefits Template](#) to record improvements in each square and how they benefit each stakeholder.
- 4. Identify the key improvements which provide the greater benefits for both stakeholders. As you flesh out the improvements, you may notice patterns in the types of improvements being suggested. Review these and look for improvements which address multiple issues and/or achieve benefits for multiple stakeholders. These are likely to be the highest-value improvements and the most important to focus on.
- 5. Repeat this for any other stakeholders, keeping the primary stakeholder (such as consumers) across the top of the template.

Using this tool we identified three common issues which have now been shared openly. The management team are now considering those new ideas. This tool helps you identify service specific issues and develop solutions co-productively.

Frank Naso – Pilot Lead  
The Society of Saint Hilarion (SA)





# Tool 13: Personas Template

The purpose of this activity is to describe the user of the co-produced idea we intend to create with a realistic persona. This will be a touchstone throughout the innovation process and we should refer back to it as the idea develops. The great thing about personas is they invite us to view the service from the consumer’s perspective.

The main purpose of Personas is more than just demographic information. They are relatively quick to develop and replace the need to canvass the whole community and spend months gathering consumer requirements. They also help avoid the trap of building what consumers ask for rather than what they actually will use or buy. Personas capture a person’s behaviour, beliefs and philosophy. But more importantly, they capture a person’s motivations and/or intentions. Personas represent the needs of a larger group of consumers, in terms of their goals and personal characteristics and expectations.

Source: <http://www.businessdesigntools.com/2013/11/personas-2/>

What another stakeholder want improved/their areas of concern				What consumers want
A	B	C		
			A	
			B	
			C	
			D	
			E	

Source: Boyd, H., Mckernon, S., and Old, A. (2010). Health Service Co-design. Working with patients to improve healthcare services. Guide and Toolkit. Auckland: Waitemata District Health Board.





## How do we use it?

### 1. Demographics

We fill in their description first, using any insight or information we have about the consumer type. We draw a sketch of him or her or find a photo that could be him or her and attach it.

### 2. What do they enjoy?

Choose home or work life depending on which arena is more relevant to your idea. What is the most satisfying aspect of their job? What are their leisure pursuits? What do they like to watch on TV? Whose company do they like to keep?

### 3. What are their goals?

Again, we choose our persona's home or personal life. What are they motivated by? What are they aiming for in the medium or long term? What would they do if they won the lottery?

### 4. What distinguishes them from others?

Do they have any quirks that are interesting? Do they belong to any particular social 'tribes' or societies? Do they have any defining attitudes or behaviours?

### 5. What keeps them awake at night?

What problems does our persona have? What causes them stress or annoys them about everyday life? What are their major worries in life? What is frustrating for them about our service?

You can develop your own questions and criteria to create personas. Some examples include living status, overall health, social network, attitude to life and tech usage.

**CommunityWest recommends using the template developed by 100% Open Innovation Toolkit to create personas of your consumer body to test your ideas.**

Source: <http://www.businessdesigntools.com/2013/11/personas-2/>

**EXPLORE: Personas**

*"When people talk, listen completely. Most people never listen."*  
*Ernest Hemingway*

2
Activity: 2. Research Needs

1. Demographics
Sketch

M

F

2. What do they enjoy?

3. What are their goals?

4. What distinguishes them from others?

5. What keeps them awake at night?

Name:
Date:
Team:

# Tool 14: Prototype Evaluation Tools

With this tool the project working group can objectively review the learnings from prototyping an idea and to record a decision to stop it, carry on or reinvent it.

## How do we use it?

Moving beyond prototypes is the next phase of idea development and is likely to involve significant investment of time and money so agreement here is important. Stopping an innovation at this point can be very valuable as it frees up resources to focus on a better bet. This tool can also form a useful springboard to go back to the brief and try a different approach. It is a good idea to use this tool as the basis for a discussion with the working group members and leaders so you can reach a consensual decision.

### 1. What idea did we prototype?

Write in here a brief description or title of our idea. Perhaps we have given the idea a 'catchy title' in which case we copy it here.

### 2. What are we going to change?

Each prototyping session will result in a host of findings and learnings. What unexpected things happened? What features and elements were missing from our idea? Record the changes we recommend here.

### 3. What remains the same?

What were the most successful elements of our prototype? We make a decision about which elements to keep and record them here.

### 4. Mark the Stop/Go/Reinvent box

This is where we record our next steps. If many elements of our prototype need to change maybe we have to stop. Perhaps in the light of this new understanding, other ideas we discounted earlier might look more attractive. Reinvention is an important principle of iterative prototyping so we circle the R if we intend to revisit the prototype at a later date.

CommunityWest have provided two templates you may find useful to evaluate your prototype.

Source: <http://www.toolkit.100open.com/buildingprototypes/i-need-to-record-how-a-prototype-performs-prototype-evaluator/>

EXTRACT  
Prototype Evaluator

"From cardboard and duct tape to ABS polycarbonate, it took 5,127 prototypes and 15 years to get it [cyclone technology] right."

Sir James Dyson

4

Activity: 4. Build Prototypes

1. What did we prototype?

2. What are we going to change?

3. What remains the same?

4. Mark the Stop/Go/Reinvent box

S

G

R

Names:

Dates:

Teams:

Culture

Practice

Review





# Review

Monitoring how co-production is carried out and the Wellness outcomes and impacts which result from your project.

## Tools & Activities

### Key User

E.g. consumer accessing exercise program

### Key Weaknesses

E.g only available at set times

### Key Strengths

E.g. interaction with others

### Key Questions/Learnings Needed

E.g. what program design works best for consumers and staff

### Key Usage Scenario(s)

E.g. strength building, improve overall health

### Ideas to Improve

E.g. change days & times of programs, including exercise routines





## Activity 5: Thank you for the gifts<sup>[42]</sup>

**Time Required:** 20 - 30 minutes

**Resources Required:**

- 1 blank card per person
- Pens

### Purpose:

The purpose of this activity is to help group members identify and acknowledge specific skills or gifts people bring to the team. Sometime people are unaware of the skills they possess. When team members acknowledge each other's skills, it is a powerful attribution which serves to build group relationships. This activity works best once the group have met as few times and know a little bit about each other.

This activity is also particularly useful if members lose sight of the contributions and gifts each person brings.

### Set the Scene:

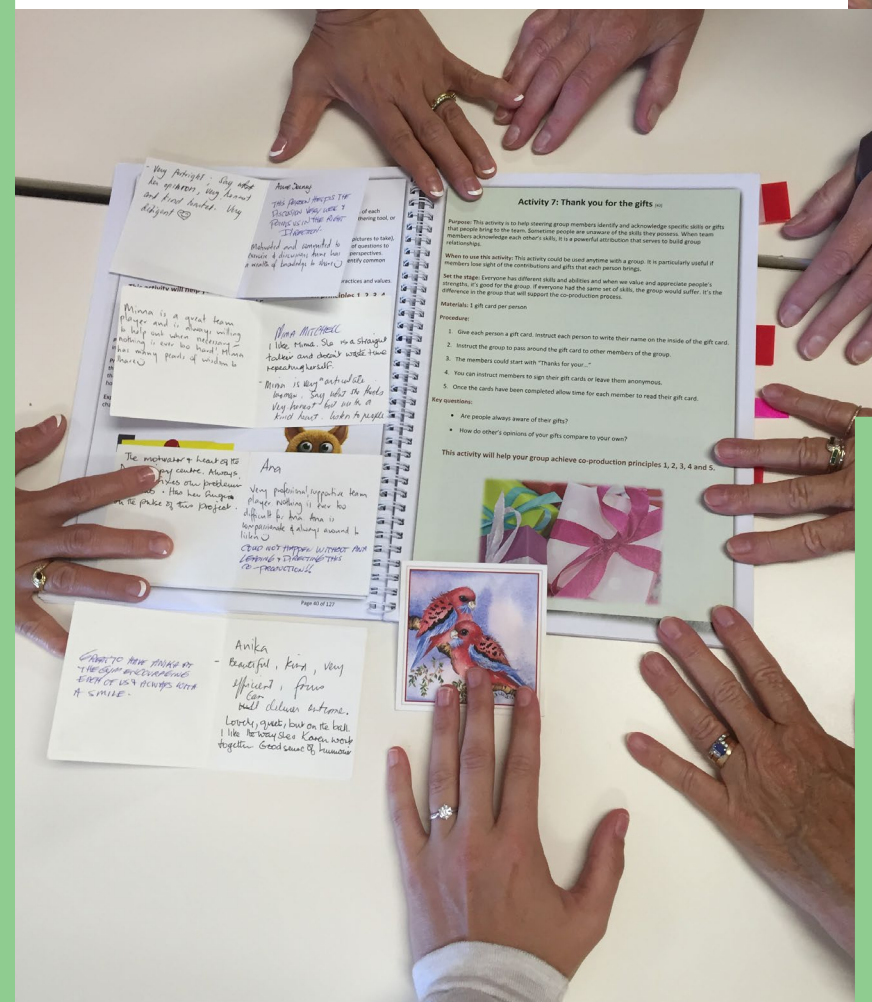
Co-production is an asset-based approach where the skills, knowledge and expertise of each person are valued and utilised. Everyone has different skills and abilities and when we value and appreciate people's strengths, it's good for the group. If everyone had the same set of skills, the group would suffer. It's the difference in the group which will support the co-production process.

### Facilitator Notes:

Each person can keep their card; and ask them to bring it with them to every meeting. As the group becomes closer, newly recognised gifts can be added.

### Instructions:

1. Give each person a blank card. Instruct each person to write their name on the inside of the gift card.
2. Instruct the group to pass around the gift card to other members of the group.
3. The members could start with "Thanks for your..."
4. You can instruct members to sign their gift cards or leave them anonymous.
5. Once the cards have been completed allow time for each member to read their gift



### Discussion Questions:

1. Were you surprised what other people recognised in you?
2. How do other's opinions of your gifts compare to your own?
3. How is this useful to identify and acknowledge people's assets?



# Tool 16: Wellness and Enablement Self-Assessment Tool

This tool provides a self-assessment instrument designed to ensure your project is on track to achieving changes which enhance Wellness and enablement focused outcomes for consumers. It may be useful for the Working Group to periodically ask themselves the following questions, particularly during the design, piloting, implementation and review stages of your project.

## Instructions:

Read through each section and answer each statement rating your readiness as 1, 2 or 3.

The rating system is simple i.e.

- 1. No action is required
- 2. There is room for improvement
- 3. Requires action

Total the number of responses rated as 1 (areas where no action required), 2 (areas where there is room for improvement) or 3 (areas that require action) under each statement. The higher the score the greater action required.

At the end record the action required for each item rated as 2 or 3.

- Prioritise action items
- Identify who is responsible for taking action and set an initial time frame
- Share the results of the self-assessment and action plan with management and employees
- Do not try and do all the action items at once. Re-prioritise and review progress as you proceed



Wellness and Enablement Self-Assessment						
Wellness and Enablement Outcomes			Action Items (2 and 3)			
Our work recognises people's existing skills and abilities, and provides opportunities for them to develop and build on them	1	2	3	Action(s) required	By Whom	By When
	No action required	Room for improvement	Requires action			
				1)		
				2)		
				3)		
				1)		
We are enhancing people's emotional, spiritual and physical well-being				2)		
				3)		
				1)		
Our project is enhancing people's positive self- image and expectations of what they can achieve				2)		
				3)		
				1)		
We are encouraging and supporting independence and people's ability to manage and make decisions about their own lives				2)		
				3)		
				1)		
We are contributing to helping people build or maintain meaningful and sustainable social connections				2)		
				3)		
				1)		

# Tool 17: Biggest Difference Template<sup>[14]</sup>

The purpose of this tool is to assist the project working group assess the impact the project outcome made, once it has been implemented. The biggest difference tool provides evidence of what difference an improvement has made (or will make) to a consumer’s experience. It also helps identify the key aspects of the experience that have been (or will be) changed and what part of the service made (or is likely to make) the difference.

This tool is important because it focuses on the consumer’s experience. It is designed to allow you to explore an improvement without needing detailed knowledge of the ‘original’ (pre-improvement) experience. But with this knowledge, it does allow you to compare and contrast the new experiences with the original.

You can use this tool to evaluate a prototype or pilot version of an improvement, or to monitor the performance of an improvement after implementation. You may wish to use this tool 1 – 12 months after implementation to measure changes and impacts on people’s Wellness and overall quality of life improvements.

## Template Instructions:

### 1. Identify the key users of the improvement

Make sure you have identified the types of people an improvement is designed for. It pays to select a range of types to check the improvement is working equally well for all, or to assess that it is working best for those who need it most (without compromising the service for others).

### 2. Have consumers experience the improvement

You can set up the experience by using prototyping, or by working with people who have experienced the improvement during actual service delivery. It may help to observe them having the experience to learn first-hand what happens.

### 3. Have consumers tell you about their experience and then reflect on the improvement

Ask consumers to tell you the story of their experiences with the improvement. Use open-ended, non-specific questions inviting the consumers to re-experience it fully. Recording stories on video and audio is a very useful way of capturing critical aspects of the experience.

### 4. Encourage consumers to reflect on the improvement

Work carefully with consumers to help them evaluate the improvement. Any questions need to be paced carefully so consumers have time to reflect on and answer them fully. Some paraphrasing and much encouragement should be used.

### 5. Identify changes to improve experience

Review your findings. Identify ways to reduce negative effects and accentuate positive effects of the improvement.

**Key Users**  
List Key Users

**What was different about improvement?**  
List Differences

**What effects this had**  
List effects of each difference

**What made the biggest difference?**  
Detail the biggest difference

**What effects this had**  
Detail the effects it had



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