



Co-producing Aged Care Services with a Wellness Focus

Part Two

A Toolkit

STEP FORWARD 
TOGETHER™

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This document was funded by the Australian Government, Department of Health.
Published in September 2016 by CommunityWest Inc., PO Box 153, Woodvale, Western Australia,
6026, Australia

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This toolkit 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 toolkit has been developed from international research on co-production approaches and tested by ten Australian aged care providers with older consumers. It features a co-production framework, links to practical tools and activities, tips and experiences from the ten pilot sites.

Purpose

Co-production has the potential to make an important contribution to future challenges the aged care sector faces in Australia. This practical toolkit will help you work with consumers to understand their experiences and make changes to improve services and Wellness and Enablement outcomes for people.

Why use it

Implementing co-production is challenging and complex [60]. This toolkit provides you with the framework and methods to improve your services to genuinely meet the needs of your consumers. The end result will be services more relevant to consumers because they have been involved in the design and implementation of it.

How to use it

This toolkit will provide you with a framework to successfully implement co-production in your organisation.

CommunityWest has developed a three-part document for aged care services providers to implement co-production. This document is Part Two, a practical toolkit, with links to tools and activities comprised in Part Three. Part One focuses on the 'what' and 'why' of co-production.

CommunityWest strongly recommends Part Two is read in conjunction with Part One to successfully implement co-production.



A Co-production Framework

The Jigsaw Model of Change Management

The Jigsaw Model of Change Management is structured around a four piece jigsaw covering culture, structure, practice and review^[59, 68]. This model is based on a 'whole systems approach' which involves identifying the various parts of an organisation and assessing the nature of the relationships between each of them^[59].

By considering these four components of service development and delivery, older people's involvement is more likely to result in change or improvement of aged care services. The four areas are depicted as four pieces of a jigsaw puzzle. As developing effective co-production across an organisation is not a linear process, the jigsaw demonstrates how each of the four elements can be considered separately or added to the puzzle in different sequences to produce the same outcome – the change or improvement of organisations^[68].

The key thing is, you need to get people to understand why we're doing this. And if they understand the why, then you get ownership and through this process they understand why you need to use this framework. It also gives you a reference point to see how you are tracking.

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



Culture

The ethos of an organisation, shared by all staff and consumers, which demonstrates a commitment to co-production.

Structure

The planning, development and resourcing evident in an organisation's infrastructure.

Practice

The ways of working, methods for involvement, skills and knowledge which assist people to become involved.

Review

The monitoring and evaluation systems which enable an organisation to evidence change affected by people's involvement in co-production.



Culture

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

The culture of an organisation is key to determining whether co-production can take root. It needs to be a culture open to change and comfortable with well-managed risk. A change in culture may be necessary if there is to be progress with co-production. There needs to be a move from delivering services to facilitating services and to facilitating and empowering rather than a one-way process of providing care^[60].

A culture which supports co-production has:

- **Leadership from the top:** The commitment of senior management is a key reason why organisations succeed in co-production. Co-production takes time and uses resources. In addition to this, the senior management must support the decisions made and actions taken by the working group.

- **Champions within the organisation:** Champions within an organisation help promote good practice and encourage others to change their ways of working^[63, 59]. Staff not directly involved in co-production may not see the benefits of this approach or understand why things are 'taking so long'. You will need to communicate this regularly to others in your organisation.
- **Support and training for staff:** Providing staff with training on how to co-produce aged care services and building the capacity of others.
- **Formal and informal methods:** In addition to formal systems for collaboration and involvement, organisations need to find informal ways of helping consumers to participate. This reflects the reality different people wish to participate in different ways and ensures those who do not wish to participate in formal systems are able to make their views heard.

Why do we need to think about culture?

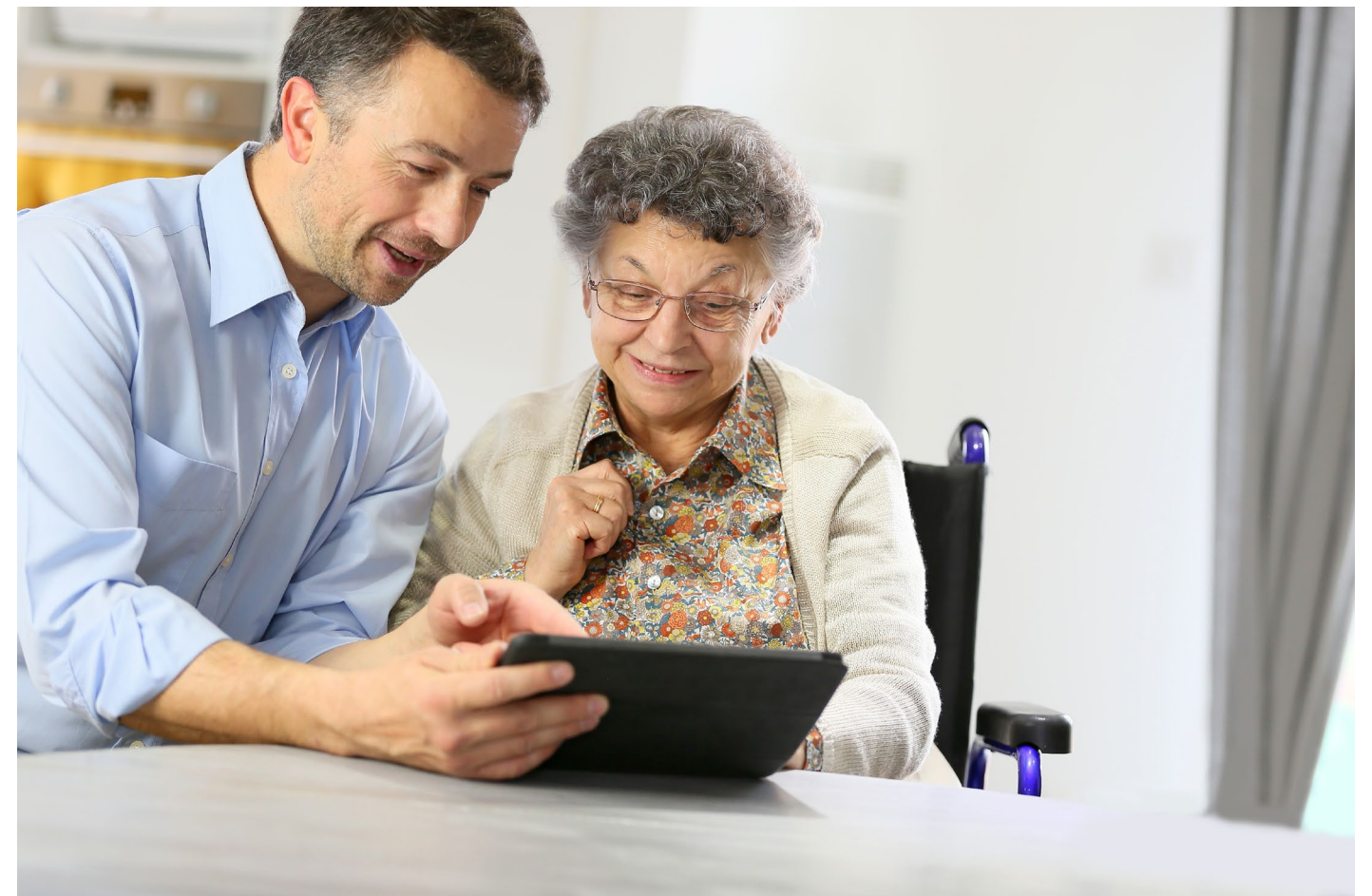
A range of cultural issues need to be thought about so professionals can successfully co-produce with people who use aged care services. These range from ownership of the project throughout the whole organisation to valuing the skills and assets of everyone involved. The culture of the organisation also needs to embrace the principles of co-production. A commitment to co-production throughout an organisation is critical to success and the support of senior management is vital.



'The principles need to be embedded in the group from the beginning. If you don't get the fundamentals right, it's not going to work the way it should.

Forming the group is important to make people comfortable to contribute their all and their best. That was important for the success of our project.'

Joseph McCarthy – Pilot Lead
Novacare Community Services (NSW)



Considering the right staff

The learnings from the Step Forward – Together™ project indicates not everyone is necessarily well-suited to co-production. This type of work requires a specific skill set, knowledge base, and most importantly, personal attributes.

Using the learning from the ten pilot sites, CommunityWest has developed a role description for people leading co-production projects to help you evaluate who would be best suited in your organisation.



'The co-production leader is someone who can listen, doesn't try to be in charge, is honest and recognises where people are coming from. You have to treat consumers as people who you asked to be part of something, not just the fact they receive services. And accept sometimes things won't go the way you thought they would go.'

Bev Wheeler – Pilot Lead
MercyCare (WA)

Key Responsibilities

Forming a co-production working group Leading a multi-disciplinary project team Coordinating and organising meetings and/or co-production events Facilitating meetings and group discussions Managing group dynamics, including conflict resolution and negotiation Documentation, record keeping, report writing	Project management e.g. deliverables, timeframes and budget Coordinating resources to ensure project's success Providing guidance and support to project team Report on project progress and deliverables
--	--

Required Knowledge

Need to have background knowledge and understanding of co-production, including definition, principles and framework	Impartial or operational distance from the project topic
--	--

Required Skills

Time management Project management Delegation skills and encouraging others to take ownership Be able to engage people and build relationships Conflict resolution skills Ability to encourage participation from all Ensuring equal involvement in the project	Maintain people's interest in the project Highly developed communication skills, written and verbal Group facilitation skills Highly developed active listening skills Highly developed interpersonal skills, and can build rapport quickly Opened ended questioning techniques Be able to run structured meetings
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Personal Attributes

Be someone who is willing to step back and let someone else take the lead if they want to. Be flexible and adaptable Patient Enjoy working with people Somebody who can see the big picture Not scared to ask questions Self-awareness Empathy	Non-judgemental Be open to ideas - 'If you stay inside the box and don't think outside the square, co-production will die.' Conscientious Be very open to feedback, being challenged and challenging yourself Embraces reflective practice Having humility and modesty Assertive
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Engaging with the right people

When deciding to commence a co-production project, you not only have to consider the staff best suited to the project and the approach, but also the most appropriate consumers to invite into project team. There are a number of contemplations for aged care service providers when considering appropriate consumers:

1. Will you need consumers with specific service or life experiences, and if so, which ones?
2. Will you need the perspectives of carers and/or family members as well?
3. What are people's capabilities to participate? e.g. physical or cognitive difficulties
4. The health of potential team members to see the project through and commit themselves (keep in mind this could change at any point throughout the project so you will need to be flexible when this happens)
5. You will need people who can represent the wider community, as well as their unique perspective.
6. It will be helpful to have consumers who have influence and networks within their local community
7. People who have the time to commit to the project
8. People who have an interest in what you're trying to do

There is a temptation to pick the 'easy' consumers, those people who you normally consult with, or who volunteer themselves for similar roles. Be conscious not to default to the same people and consider engaging with people who you don't normally consult with to capture a different viewpoint and perspective. Be aware of consultation fatigue within your current consumer body.



See Tool 2 for a one page information sheet you can distribute to your consumer body to raise awareness and interest in being involved in co-production.

Inviting consumers

The pilot sites in the Step Forward – Together™ project utilised a number of different methods to identify and invite consumers to be part of their co-production projects. A number of pilot sites approached people individually, inviting them via face-to-face or telephone. These pilot sites saw the value in inviting and explaining the project purpose personally, to ensure they understood what they were agreeing to. Pilot sites focused on the fact they could be empowered by being involved in the decision making process, be able to make choices about how services could look and be an advocate to the rest of the community.

To encourage and maximise commitment, other pilot sites explained it would be relatively informal, involve morning tea, be a great chance to meet new people and get to know some of the staff of their organisation in a different capacity.

CommunityWest recommends organisations consider a working group of no more than eight people, including staff, consumers and carers. The larger the group, the harder it can be to make decisions and meetings are less likely to be productive and effective. It's better to have quality from a small number of people and then you can always test your ideas and assumptions with others outside of the project working group. CommunityWest recommends having a 50/50 ratio between professionals and consumers.



See Tool 3 for inviting consumers to be part of a co-production project. This was developed using examples from the pilot sites.

Steering Group composition in Step Forward - Together™ pilot sites

Pilot Site	Staff	Consumers/ Carers	TOTAL
Calvary Community Care (NSW)	3	3	6
Centacare Community Services (QLD)	5	2	7
Jubilee Community Care (QLD)	5	2	7
MercyCare (WA)	4	2	6
Novacare Community Services (NSW)	3	4	7
The Society of Saint Hilarion (SA)	3	5	8
St Bartholomew's House (WA)	4	3	7
Uniting AgeWell (Vic)	2	3	5
Uniting Communities (SA)	4	5	9
WestCoast Home Care (SA)	4	2	6



Establishing your working group culture

Once your project team has been finalised, you will now need to arrange a meeting to get everyone together, get to know each other and discuss your project idea. But before you get involved with the 'what', you first need to consider the 'how'. Co-production requires a conscious change in the way you work with people and there is a foundation which must be built prior to starting the 'real' work.

As part of the Step Forward – Together™ project, CommunityWest provided training to all ten pilot site steering groups on definitions of Wellness, enablement and co-production, and facilitated a number of activities and discussions based on the six principles to establish the group culture and to help the group get it right from the beginning. All ten pilot sites reported this training was invaluable to their project and helped the group form and work together staying true to the principles of co-production over the eight months.

Remember the stages of groups and **team formation** will definitely apply to your working group! Consider the four stages of forming, storming, norming and performing.

CommunityWest has provided a copy of the session plan and facilitators guide to assist organisations to facilitate this training themselves within the project working group.



See Tool 4 for a copy of the training facilitation guide, complete with activities.

Hint

Consider engaging a facilitator for this training, someone who has a good understanding of both Wellness and co-production and can challenge the 'status quo'. This allows the project lead to be a present and active member of the working group, and build rapport and trust with others.



Building Trust and Rapport

It may take time for older people to build sufficient trust to express their views and opinions.

In order for your project to be successful, trust in your working group will need to be built quickly. Members of the Ottman et al., (2011) study worried their participation would have negative repercussions on their relationship with the service provider and the people who support them.

The researchers facilitated the trust building process by providing information and facilitating peer discussions.

Tips to build trust and rapport:

- Make sure they realise this is not purely lip service.
- Don't ask people for their views when the decisions have already been made.
- Be open and transparent about what might or might not happen as a result of the discussion.
- Don't use management terms, jargon and abbreviations in meetings.
- Always disclose how you will be using the information you acquire from them.
- Be genuine, authentic and approachable.



Check out Lighthouse Resources for card games to promote trust.



Hear from a Uniting AgeWell staff member about trust and rapport.

Power Dynamics

Consumers are in an unequal position with service providers ^[5, 55, 59]. Additionally, they may experience what are termed 'multiple oppressions' through being a service user and being a member of a minority group on the basis of ethnicity, gender, sexuality, or age ^[21, 23, 59]. These existing power imbalances are often reproduced when service providers involve consumers.

Some participation structures may replicate ways of operating which are exclusive rather than inclusive, for example, by insisting on very formal agendas and rules of debate ^[6, 59]. Service providers may retain power by defining who is a 'legitimate' or 'representative' participant ^[10, 45, 59] for example, by controlling who is invited to co-production events and meetings.

Consumers have become accustomed to being passive service 'recipients'. You will need to work with consumers to help them understand why it's important the organisation shares the power and doesn't make all the decisions in the group, as this will be a very different approach to what older consumers are used to. Be prepared for consumers not wanting to take the power you are offering in the first stages of your project. In order for them to accept it, it may require constant reassurance on your part.

Hint

Avoid wearing organisation name badges or uniforms when attending co-production meetings. Simply use sticky labels and write people's names on them. This simple technique breaks down role-related power dynamics instantly. As a staff member, always consider what you wear to meetings which could highlight the power differentials in the group.

Remember co-production is not about handing over control and decision making entirely to consumers, but about the service provider and consumers sharing the power to make decisions together.

"As old people it's much harder to make your voice heard. You don't think the same as the young ones, but you wouldn't say anything because you don't want to rock the boat, so you go with the flow. If we want to do something and they don't think it's right, we don't do it. Some people are frightened of people in charge."
(Consumer)



Developing a culture for co-production

The following tools and activities have been chosen to help your co-production project team create a culture which lives and breathes the principles of co-production. The tools and activities have been collected from international research and tested by the Step Forward – Together™ pilot sites staff and consumers. Some of these have tools have been modified based on recommendations from the pilot sites, however you can access the original versions via the reference list.

The tools and activities have been taken from a wide range of applications, but are all centred on a group of people working together as equals. This toolkit is designed to give you flexibility and the choice to pick which one(s) you think would work best in your group.

Some of these activities are in the training workshop, and you can use others for ice-breaker activities, games for breaks, or even as team building activities.

The activities are based on the principles of co-production and can be used to initiate and facilitate a meaningful discussion about what the principles look like in action and engender a commitment to these within your project working group.

Practical tools and activities


Co-drawing


Thank you for the gifts


Gifts of the Head, Heart and Hands


Life Highlights


Tree of Strengths


Personal Objects


Trading Places

The Change by Design card game can help to build a culture of shared leadership and cooperation.





Structure

The way the organisation, project team and its systems are arranged to carry out the work.

An organisation may need to make changes to roles, systems, and structures so it can support co-production^[17, 60]. Co-production can work in existing structures and it can also begin to turn the existing structures upside-down^[15, 60]. Co-production puts an emphasis on personal relationships with organisations needing to move away from centralised and hierarchal structures to support co-production^[17, 60].

Developing a co-production approach does not necessarily mean starting from scratch; there may be opportunities to build on existing cultures, structures and practices^[43, 60]. In fact, the most successful co-production builds on the resources already available:^[60]

- Involve everyone who will be taking part in the co-production from the start.
- Value and reward people who take part in the co-production process.
- Ensure there are resources to cover the cost of co-production activities.
- Ensure co-production is supported by a strategy which describes how things are going to be communicated.
- Build on existing structures and resources.

Creating a structure for co-production^[37]



Project Lead

The Project Lead brings people together and invites them to create something more than what they can make alone. The person in the role of Project Lead offers a topic and/or purpose for the conversation, and then let's go of controlling the result. The Project Lead is also able to participate in the process as a 'contributor.'



Facilitator

The facilitator supports everyone to contribute by asking relevant questions, encouraging interaction, and listening in a way that which draws out the group's wisdom. The facilitator remains neutral about the issues, keeping their own personal opinions out of the conversation.



Contributors (staff, consumers or carers)

The contributors offer ideas and create discussions in the group. It is important they maintain a spirit of open-mindedness, acceptance, curiosity and sincerity.



The Scribe

The scribe records what discussions are had in co-production meetings and events, including decisions made.



The Timekeeper

People are giving up their valuable time to attend co-production meetings and events. Ensure these start and end on time, when promised. It is the timekeeper's job to remind the Facilitator if time is running short.



"Having someone take minutes was helpful so I could be an active member of the group. When I was trying to do minutes and chair meetings it was really hard. We allocated a time-keeper which was really useful to keep meetings on track and make sure we discussed everything we needed to."

Bev Wheeler – Pilot Lead
MercyCare (WA)

Because what we were co-producing had never been done before, and because there were so many stakeholders involved, I wouldn't move on in our meetings until everyone understood where we were going. Otherwise you will lose people along the way.

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



It's important in the beginning to set the expectations about each of the roles within the group, making sure everyone's clear about what our responsibilities are so that we can manage it when things don't go to plan. You will need to find out the best channel of communication for each individual in the group. For example; email, phone or letter.

Judith Henriksen – Pilot Lead
Calvary Community Care (NSW)

HINT

The Facilitator role can be filled by any member of your project working group and can change each time you meet. This will encourage the group to learn from each other and gain from different skills and strengths people have. This can also be applied for the timekeeper and scribe.

It is important people leave this type of meeting feeling valued, included and respected.

Planning your co-production meetings

Careful planning will make it easier to put your co-created ideas into action later on. The more people and points of view you include during the planning phase, the more support you will have when it is time to implement the results^[37].

Project Lead's Role

As the person who is initiating your co-production journey, your role is to get things started. The following suggestions will help you do this^[37].

1. Involve your project working members in the project planning process.
2. Don't assume the way you see the issue is the same way others see it. It is important to discover how all members identify their important issues and desired outcomes before the project planning and co-production work really starts.
3. Be clear on the purpose for each meeting and share the purpose with others. The following questions may be helpful in identifying the purpose:
 - Why are you calling this meeting/having this discussion?
 - What is the topic to be discussed?
 - What is the opportunity or possibility?
 - What outcomes are you trying to achieve?^[66]
 - Has any work already been done on this topic?^[66]
4. Choose a location, time, frequency and duration for meetings which best suits the members of the project working group. It is recommended you co-produce with members about the location, time, frequency and duration before scheduling any meetings. Most co-production meetings and events have duration of 1.5 - 2 hours. A neutral location might also be useful.
5. A common mistake leaders and facilitators make is to be overly optimistic as to what can be achieved within a given amount of time. Another common denominator in ineffective meetings is not scheduling the meeting for long enough, and in the case of longer meetings, not scheduling enough breaks. A schedule which sees the last session of the meeting (e.g. action planning) in the morning rather than late afternoon is usually more effective^[66].



HINT
Be sure to leave plenty of time at the end for creating an action plan with next steps and accountabilities.

HINT
Be wary of only holding formal meetings as this may put people off being involved. You will need to consider what sort of environment will make people feel most relaxed, creative, and able to contribute as equals.

Inviting people to meetings

In order for your co-production process to be effective, you want people to look forward to attending meetings and events. Invite people to your events in a way which encourages participation and involvement. Make sure everyone has the same information and understands how important their involvement is. When running meetings or events that may include other members of the community, cast your net wide. Don't be reluctant to invite people who you think may disagree, and let your fear keep them out of the conversation. The sooner you engage them, the more likely they are to contribute^[37].

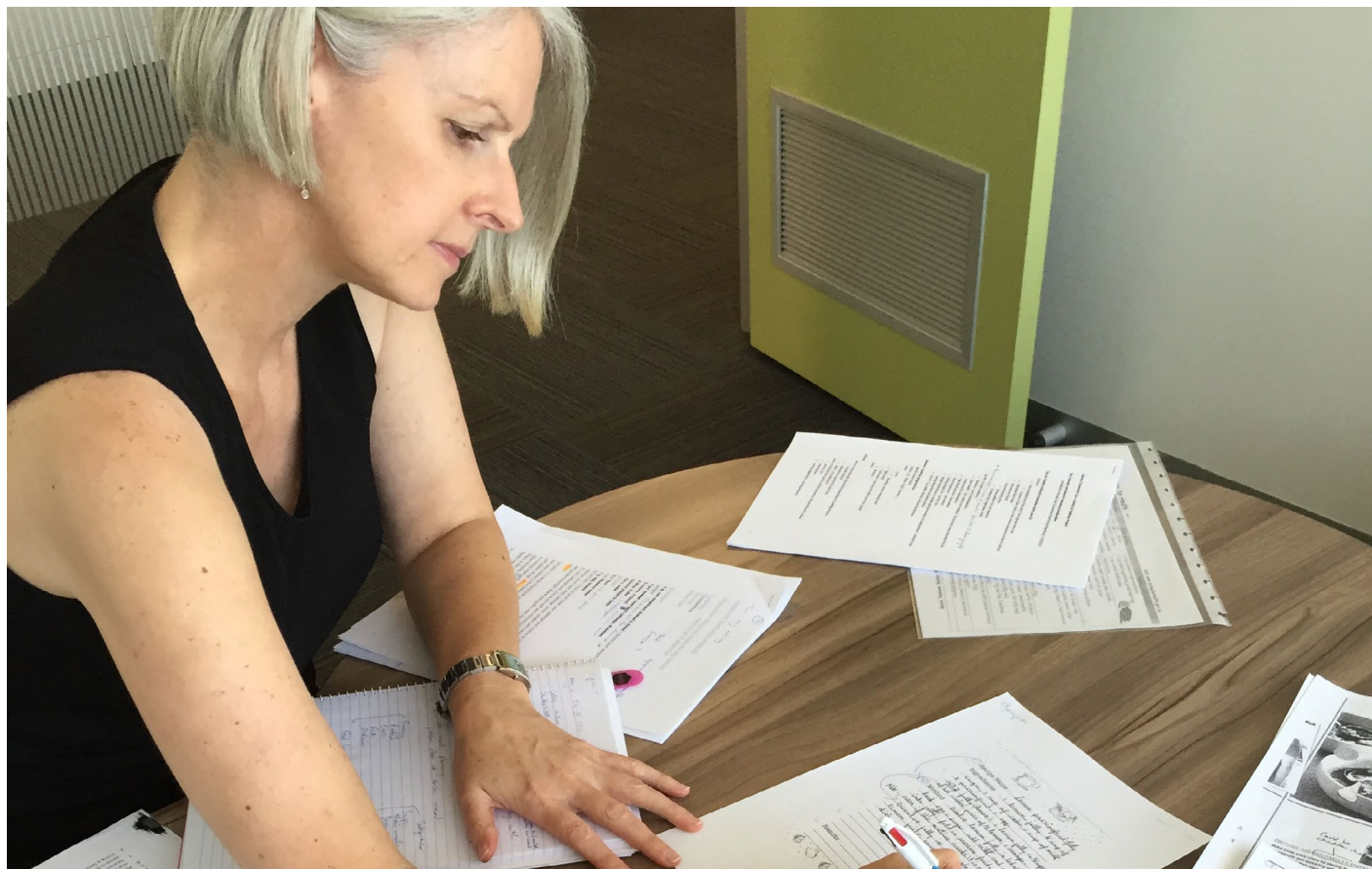
Project Lead's Role

At this stage, the project working group is working with the Project Lead to do the following:

1. Create a final list of who will be invited to your meeting or event. This list will include your project working group members, but may also include other stakeholders. When deciding who to invite, think about who could contribute to, or further the issue/topic you are focusing on. Directly invite individuals and don't forget to ask others who they think should be added to your list.
2. Extend the invitation and include all relevant information such as:
 - The date, location, start and end times and who to contact for information
 - The purpose of the meeting and the activities planned
 - Who the planners and invitees are
 - Background information on the issue/topic, including any information to read prior to attending.
3. Plan how to organise the room to optimise collaboration. Make a list of supplies and resources such as food, tables, chairs, easels, chart paper, name tags, pen, paper, computer, projector or other equipment and identify who will bring what. See page 22 for tips on setting up a space for success.
4. Identify people needed for various tasks, such as co-facilitating, leading small groups, taking notes, keeping time, running technological equipment, setting up, cleaning up etc.
5. Send a confirmation or reminder about the event a few days before.



HINT
Match the setup to the specific purpose of the activity. Discussions aimed at developing ideas or arriving at decisions typically requires lots of workspace for writing. The ideal setup includes spaces for networking and small-group interaction. This helps keep ideas flowing beyond the content and also keeps perspectives fresh.



Facilitator's Role

Working closely with the Project Lead, the Facilitator will need to consider what co-production activities and discussion questions will suit the purpose of the meeting.

Contributor's Role

Your role is to contribute if you choose to attend the meeting. Here are some suggestions:

1. Respond to the invitation to the event
2. If asked, recommend other possible Contributors to invite
3. Arrange your calendar to be on time and plan to stay until the end
4. Read any materials you are sent before you arrive
5. Call if you will be late or have to cancel
6. Realise how important your unique contribution is and carefully consider what ideas and attitudes you will bring

It wasn't as action orientated as a normal work meeting, so I found it useful to have discussion points going in to the meeting
Bev Wheeler – Pilot Lead
MercyCare (WA)



HINT

Carefully consider how the invitation is extended, and by whom, to increase the likelihood all perspectives will be present. When people arrive having the same information, it saves time, minimises confusion and reduces conflicts.

Setting up a space for success ^[37]

It is important to create an environment which puts people at ease and makes them feel comfortable. When people feel safe they are more likely to access modes of thinking which support and encourage collaboration and co-production principles.

Arrive early

The set-up team and Facilitator should arrive in plenty of time to set the room up and take care of any unexpected surprises or delays. Never assume the directions or diagrams you have given to others for room set up has been translated properly.

Greeters

Welcome everyone warmly as they arrive. This sends a message they are important and helps put them at ease. If everyone doesn't know each other, have name tag stickers for people to write their name on it.

Information

Have signs posted and clear information available as people arrive to help them get orientated.
Hang charts where they are highly visible and easily read by those with difficulty seeing.
Have background information available as handouts or posted on the wall in large print e.g.
Co-production principles, working guidelines, project name, project purpose etc.

Chairs and Visibility

The more people can see each other's faces, the better. This will help build connection, trust and solidarity. Try to set up the room so people can see everyone's eyes.

Minimise barriers between people, including tables.

Chairs with hard seats and without back support are uncomfortable for many people. If possible, have a few different kinds of seating options. Alternatively, offer cushions and be sure to not have people sit for too long without a break.

Ask yourself a few questions: Are aisles wide enough to accommodate wheelchairs? Are the furnishings ergonomic? Remember: Physical comfort is important to every meeting's success.

Sound

To make sure everyone can hear what is being said, you will need to consider people who have hearing difficulties and where they sit in the room.

Microphones are useful for larger groups, unless feedback becomes a distraction. Hand-held or cordless microphones are useful as they can be given around the room.

Music influences mood, so use it purposefully. Played softly in the background during breaks it can be used for setting a tone and relaxing people. Upbeat music or music with appropriate lyrics can energise people. Keep in mind however, someone with hearing difficulties might find this distracting.

Air

Oxygen and room temperature are very important. If possible, have a window open all, or part of the time.

If you are not in an air conditioned closed environment, you can:

- Encourage people to go outside during a break to get some fresh air
- Open a nearby door to the outside and leave the door to your meeting space open
- Bring in some plants with large green leaves
- Bring in a fountain for running water
- Bring in an air-filtering device

Temperatures can change frequently in most rooms and people have different preferences for room temperature. Watch for signs of sleepiness or closed body posture and adjust the temperature as required. It is better to have a room on the cooler side, than warmer.

Odours

Avoid air sprays or scented candles in case some people are allergic to specific scents.

HINT

If you are meeting inside and using tables and chairs, consider the room set up to optimise communication, creativity and collaboration. You can research examples of room set ups online.



Privacy

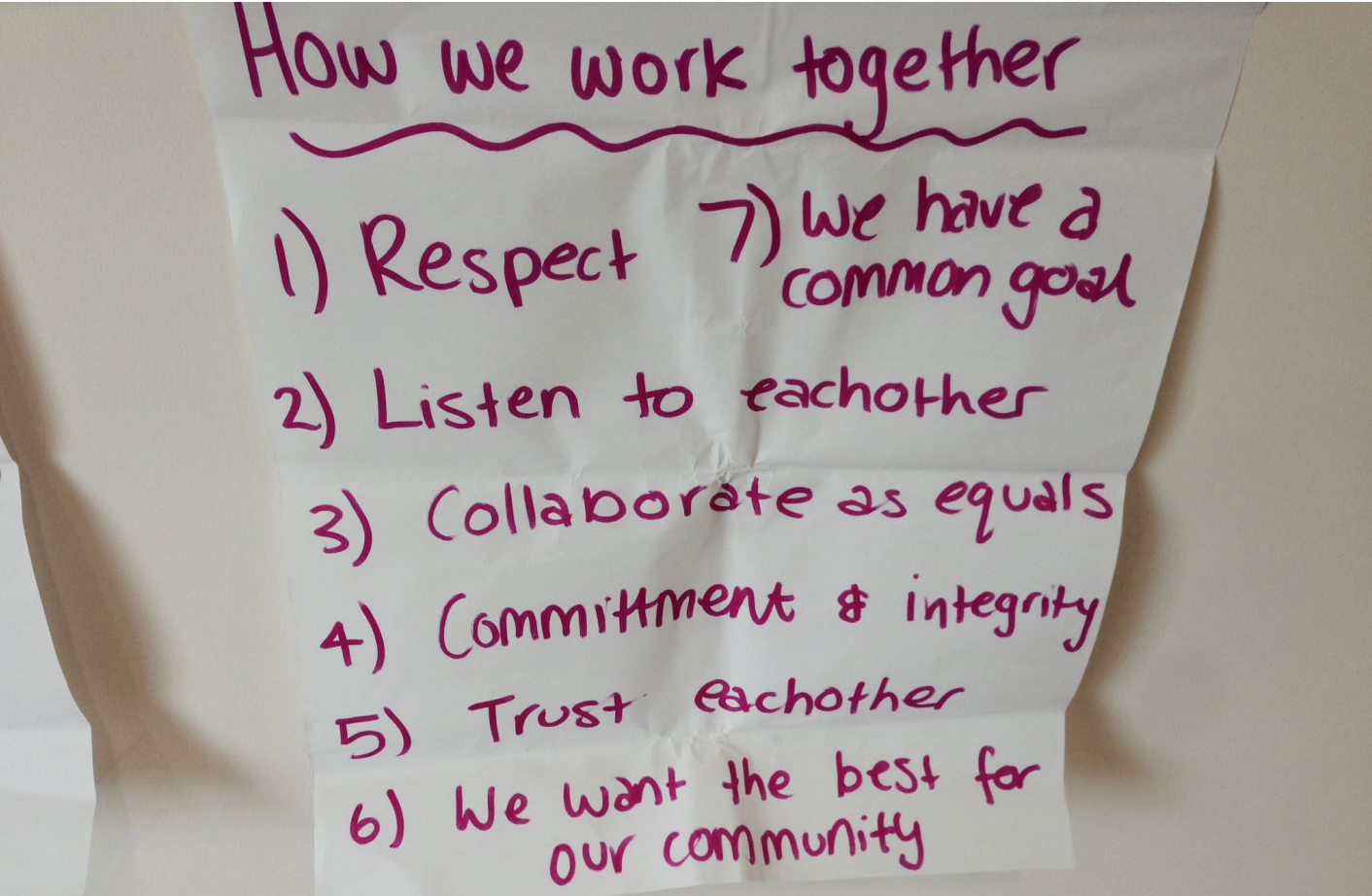
Minimise distractions and create the illusion of privacy, even if it isn't actually private by:

- Face chairs away from any distractions.
- Ask people not involved in the event to leave the area.
- Put a sign up requesting privacy.
- If there are phones in the room not required, turn to 'do not disturb.'

Food and Water

Sharing food together is a wonderful way to build bridges and create connections. It can be difficult for some people to concentrate when feeling hungry, thirsty or experiencing cravings. Here are some tips:

- Always have water available, even for short meetings.
- Provide additional choices outside of tea and coffee. It might be helpful to ask people for their preferences prior to the meeting.
- For longer meetings, provide a variety of snacks which includes protein (cheese or nuts), carbohydrates (bread or crackers), and sugars (fruit juice, fresh fruit, sweet biscuits).



Establishing a group ‘contract’

A working group contract or terms of reference is very useful to establish in either your working group training session, or your first meeting at the commencement of your co-production project.

Establishing your group’s contract can be done through a facilitated discussion where everyone contributes to the way they will work together and everyone’s contribution is valued. This stands as a commitment made by all members on how to behave and treat others during the project life.

It may be useful throughout the co-production process to display these at every meeting as a visual reminder of the commitment made at the beginning. This is also useful as a facilitation tool if people are not behaving as per the values and ethos of the group.

The principles need to be embedded in the group from the beginning. If you don’t get the fundamentals right, it’s not going to work the way it should.

Joseph McCarthy – Pilot Lead
Novacare Community Services (NSW)



Making Decisions

Decision making is an important part of the co-production process. Integral to the success of your project is determining and agree on the way the working group will make decisions over the course of your project. It is important this is established as soon as possible and followed through until the end of your project. There are a number of ways your working group can make decisions. It will be up to the group to decide how you will decide!

Some advice for setting up decision making processes is: ^[37]

- Avoid indecision or ‘plop decisions’ (nothing is decided, but because we move to the next item, people think it was decided).
- Create clarity in the decision making process before anything is to be decided.
- Clarify the options well when making choices.
- Let everyone speak – this can help to create motivation.
- Don’t take too long to decide – it may be better to put the decision on-hold and come back to it, than get caught up in decision making for too long – the latter drains energy and does not improve effectiveness.
- You may need to develop some strategies if the group can’t reach a clear decision. Identify where there is agreement or a decision, where there isn’t and why, and decide what action will be taken so the group can make a decision.
- Be creative!

There are a number of different ways your working group can make decisions throughout your project. You may want to use one, or a combination of two or more. Your options are not limited to what is provided here, be creative and use what works for your group.

Option One: democratic (majority) decision

In a democracy everyone votes and the majority vote wins. Decide with the group what percentage of the vote is needed for a majority decision.

Strengths	Weaknesses
Useful when there is insufficient time to make decisions by consensus.	Group may be split between ‘winners’ & ‘losers’; reduces the quality of the decision. Minority opinion not discussed & may not be valued.
Useful when the complete group member commitment is unnecessary for implementing a decision.	May have unresolved & unaddressed conflict. Full group interaction is not obtained.

There are a number of different methods you can use for democratic decision making:

Voting

- 1. Show of hands:** The most common approach to the technique is simply to ask for a show of hands about each item on a list, one at a time, and the item that gets the most votes in a show of hands is the item selected from the list.
- 2. Ranking:** Ranking is assigning one value to each item to select the single, most important item from a list. For example, a ranked list would have one item ranked as 1, another as 2, another as 3, etc.
- 3. Rating:** Rating is associating a value with each item in order to identify ranges of items from a list. Several items can have the same value associated with them. For example, a rated list might have several items rated as high, medium or low or as 1, 2 or 3
- 4. Dot-Voting:** A common approach to using the technique is as follows.
 - Each person gets a certain number of dots (votes) he or she can use to vote for items on a list. The number of dots they get is usually equal to the number of choices to be made from a list. For example, if three items are to be selected, each member gets three dots.
 - Each member walks up to the overall list of items and places their dots next to the items the member recommends be selected from the list.
 - After all members have cast their votes, the items which received the most votes get selected from the list.
 - The dot-voting technique has variations. Different coloured dots can represent more than one vote, or even a negative vote. Sometimes, each member is given one vote of each weight and required to apply each vote to a different item. In other cases, a member is allowed to cast multiple votes for one item.
- 5. Thumb Voting ^[37]:** People can vote for ideas or proposals with their thumbs. This is a way for people to air their concerns without voting for anything and for differing viewpoints to be heard and included. Here’s how to do a thumb vote:
 - Clearly state the item/idea that is proposed. Ask people to hold up one thumb to indicate as follows:
 - Thumb straight up if they are willing to go with what has been proposed
 - Thumb straight down if this is unacceptable
 - Thumb sideways if they are unsure or need more information before deciding
 - For those with their thumb down or sideways, you can ask:
 - What is your concern?
 - What information is missing?
 - How could this be changed to include your ideas or to get your agreement?

Each time you receive a new suggestion, do the thumb vote again until an

acceptable solution is found.

Alignment

Rather than voting, you can seek to identify where there is alignment within the working group. Alignment means people are willing to move in a general direction, even if they are not in complete agreement. To determine alignment you can ask:

- Is this acceptable?
- Can you live with this and support it?
- Is it close enough?
- Can we go with this for now and revisit it if it becomes an issue?

Option Two: unanimous decisions

When making unanimous decisions everyone has to agree on a given solution/ proposition. When the unanimous decision does not come quickly, groups face the dilemma of having to dedicate more time than they hoped to make the decision or to have to change the decision making process. The second option can lead to conflict and dissatisfaction, especially if only a small number of people in the group were “against” the majority.

Strengths	Weaknesses
Portrays solidarity to people outside of the working group	Requires a significant amount of time to reach complete agreement

Option Three: Consensus

Stepladder Technique

The Stepladder Technique is a simple tool that manages how members enter the decision-making group. Developed by Steven Rogelberg, Janet Barnes-Farrell and Charles Lowe in 1992, it encourages all members to contribute on an individual level BEFORE being influenced by anyone else. This results in a wider variety of ideas, it prevents people from “hiding” within the group, and it helps people avoid being “stepped on” or overpowered by stronger, louder group members. All of this helps the group make better decisions.

The Stepladder Technique has five basic steps. Here’s how it works:

- Step 1: Before getting together as a group, present the task or problem to all members. Give everyone sufficient time to think about what needs to be done and to form their own opinions on how to best accomplish the task or solve the problem.
- Step 2: Form a core group of two members. Have them discuss the problem.
- Step 3: Add a third group member to the core group. The third member presents

ideas to the first two members BEFORE hearing the ideas that have already been discussed. After all three members have laid out their solutions and ideas, they discuss their options together.

Step 4: Repeat the same process by adding a fourth member, and so on, to the group. Allow time for discussion after each additional member has presented his or her ideas.

Step 5: Reach a final decision only after all members have been brought in and presented their ideas.

The Delphi Method

The Delphi Method can be continuously repeated until consensus achieved. However, three repetitions are often sufficient to collect the needed information and to reach a consensus in most cases. More information on the Delphi Method can be found here.

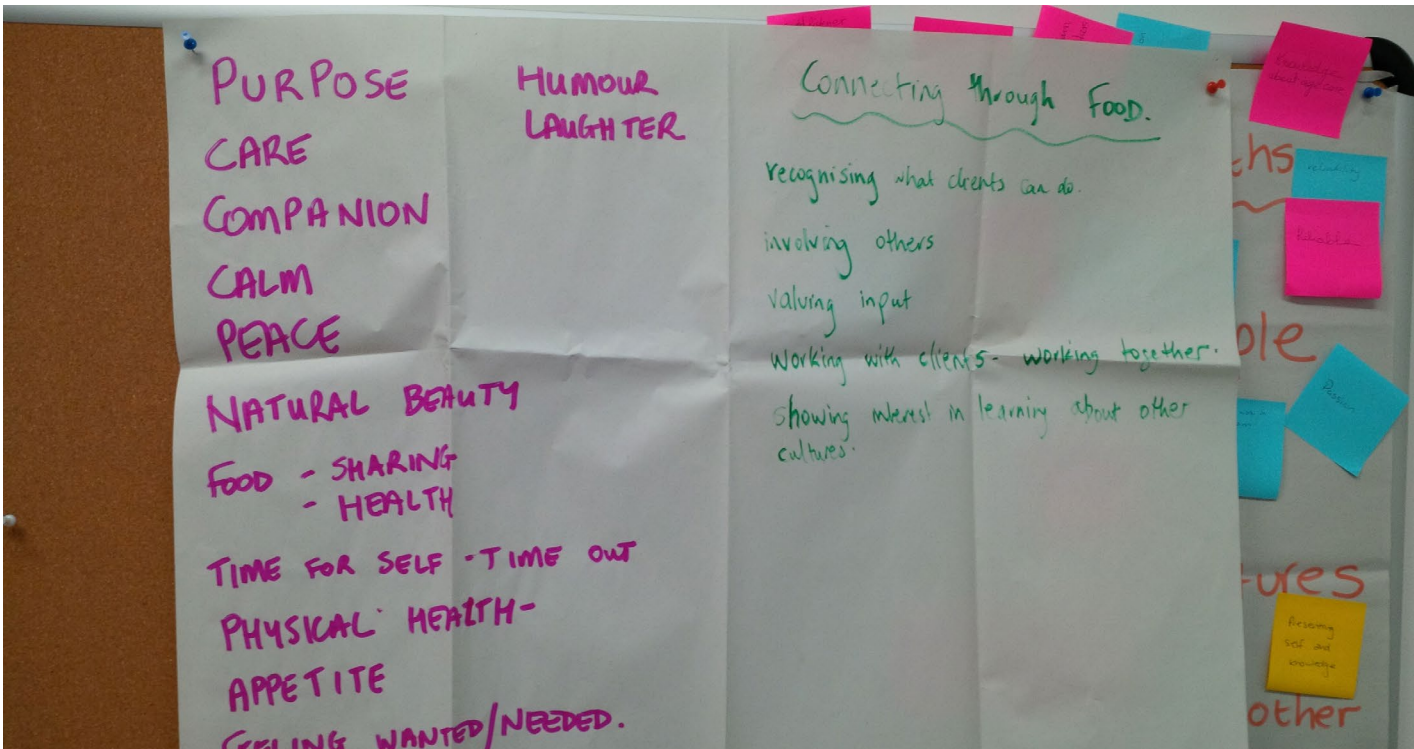
If you are having trouble reaching consensus, here is a list of potentially helpful questions to ask working group members who support the solution:

- Under what conditions would you support this solution?
- What part of the solution do you oppose?
- What parts of the solution would you modify so you would be more comfortable with the solution?
- What would be necessary for you to agree with this solution?
- Would you be willing to live with the solution for a limited time?
- What would be a reasonable time before we reassess the decision?
- Under what conditions would you be willing to put aside your differences?
- What are you willing to do to adjust your views to respond to the discomfort of those who are not yet in agreement?
- If you were not in agreement, what parts of the solution might be troublesome to you?

Individuals who feel as if they haven't been heard can become uncomfortable by being singled out for this kind of attention. The facilitator needs to be sensitive to this issue.

HINT

Be prepared for consumers in your group wanting the Project Lead and other staff to be in charge and make all the decisions. Given the historical relationships they will expect you to take charge. You may need to work hard to share the power!



Documenting Co-production

The Project Lead will need to consider how the working group will document the co-production process, discussion items, decisions made and actions taken. This is an important part of any project management, as well as useful for reporting to senior management on the project's progress and communicating the rational to people not directly involved with the project.

There are a number of ways the working group can document the project, however like all decisions, this needs to be made by the project working group, rather than by one individual.

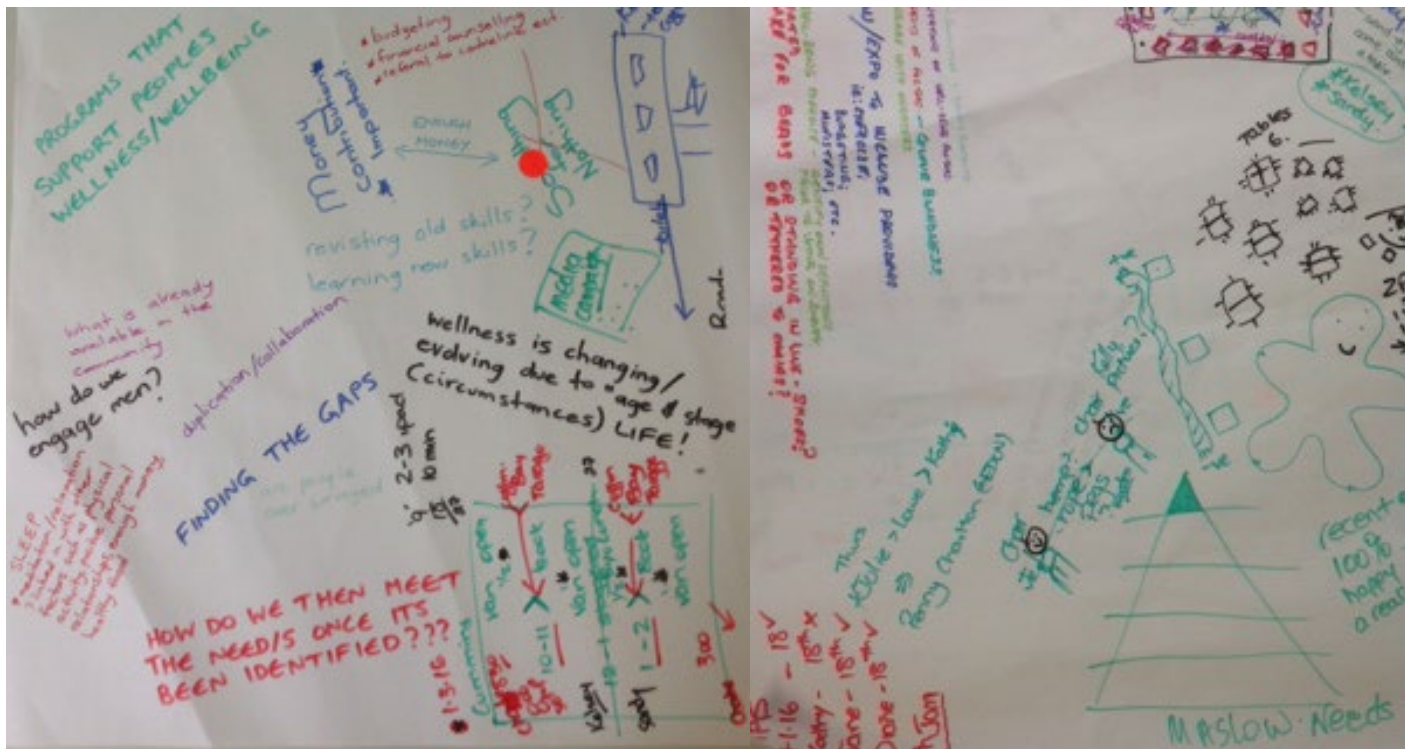
The beauty of the co-production process is you can be creative and adapt your project processes around the needs and wants of the group and the project objectives.

Don't feel you have to be tied down to specific forms of documentation, just because it's the way you do things in your organisation historically.

Meeting Agendas

CommunityWest encouraged the Step Forward – Together™ pilot sites to think outside of the box when using agendas. We encouraged steering groups to use creative and visual methods, as opposed to many pieces of paper which may be inaccessible to some consumers. MercyCare (WA) found a formal agenda did not work for their steering group.

Alternatively some pilot sites found consumers preferred having an agenda with



a traditional and formal model of meeting management. The pilot sites believed this was because the consumers in particular had been used to this way of working throughout their careers and believed it was the best way to do things.

Meeting Minutes

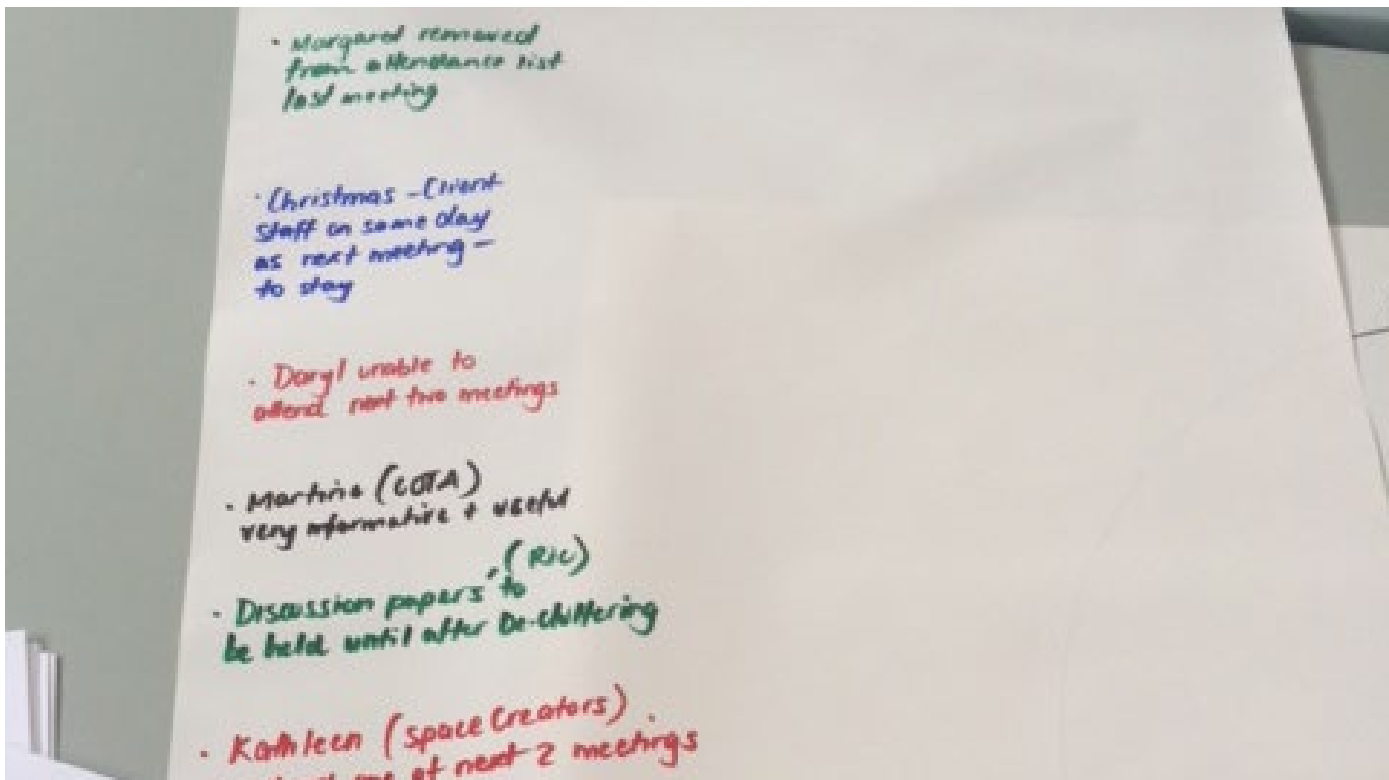
Similar to agendas, CommunityWest encouraged the pilot site steering groups to experiment with informal and visual methods of recording discussions, decisions and action items.

Some pilot sites used butchers paper to document this throughout their meetings, whilst other groups preferred minutes taken and copies distributed to each member after the meeting.

By offering alternative ways of doing things, you may encourage different people to get involved, particularly if the task becomes more informal and less threatening.

"I was trying to make it less formal, but the group wanted the formality. Consumers wanted minutes taken. They're the best group I've ever worked with, they all actually read the minutes and came back with feedback! I think it's to do with the age group of people I was working with. I'm sure if I was working with young people with disabilities it would be entirely different".

– Bev Wheeler, Pilot Lead
MercyCare (WA)



Using a Summary Document

This document can be used instead of formal meeting minutes, or could be used to summarise notes taken on butcher's paper. The summary document contains all of the information and agreements made at co-production meetings or events.

At the end of the meeting, identify the following:

1. Who will be assembling and/or transcribing the notes to make the document?
2. Who is responsible for sending out the document?
3. Who will the document be sent to? At the very least, it should be sent to everyone that attended.

The document should include:

1. The date and purpose of meeting.
2. The comments and ideas generated, as well as the common themes.
3. Action plans and decisions made, including timelines and accountabilities.
4. Observations or recommendations of the Project Lead, Facilitator, or other working group members.
5. A list of attendees.

I made sure I summarised key points and asked someone to take ownership of tasks and recorded it so everyone understood, before moving on to the next discussion item.

Caroline Grogan – Pilot Lead
Centacare Community Services (QLD)





Practice

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

Making co-production happen in practice is about all those who are involved in the process, who may have different perspectives, working together to achieve agreed aims. This means building relationships ^[60].

It is important to make sure people who use services attend all co-production events. This will help new working relationships to develop and shift power, which is integral to transformative co-production. It will also be helpful if people who use services are given opportunities to meet on their own to talk about and agree their priorities ^[60].

In order for co-production to work it is important to:

- Ensure everything in the co-production process is accessible to everyone taking part and nobody is excluded.
- Ensure everyone involved has enough information to take part in co-production and decision making.
- Think about whether an independent facilitator would be useful to support the process of co-production.
- Ensure frontline staff are given the opportunity to work using co-production approaches, with time, resources and flexibility.
- Provide any support necessary to make sure the people involved have the capacity to be part of the process.
- Ensure policies and procedures support the use of co-production approaches.

Having the conversations ^[37]

In order to get the most out of your co-production meetings, discussions and events, it is important to build trust and goodwill, get the important issues and perspectives out on the table, develop an understanding of the 'whole' by hearing from everyone, come to a sense of an agreed way forward, and plan the actions to be taken ^[66].

Project Lead's Role

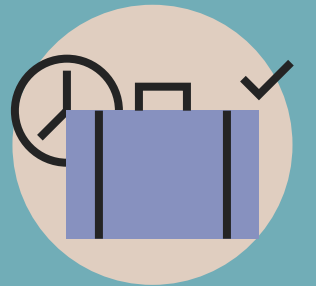
At the beginning of each co-production meeting and event, the Project Lead is the first person to address the group. It is important to model the attitudes and behaviours required of everyone.

1. In your opening remarks, explain honestly why you have initiated the conversation. Honest sharing helps smooth concerns people may have.
2. Let the group know if you will join them as a Contributor once your part is complete.
3. Introduce the Facilitator and provide a brief background about them.

Facilitator's Role

The steps below will assist the Facilitator to create the conditions for effective co-production conversations. It is important to stay flexible so you can include unexpected ideas the group agrees to pursue.

1. Welcome people and thank them all for attending.
2. Give basic logistics information, such as where the bathrooms are, break times, food and refreshments etc.
3. If applicable, confirm everyone received and read the background material. Have extra copies to distribute if required.
4. Confirm everyone's agreement to follow the group's guidelines/contract for attitude and behaviour. Keep a large and legible poster of the guidelines clearly displayed at each meeting and event.
5. Do an opening ice-breaker activity. Some suggestions can be [found here](#).



HINT

Provide post-it notes to record thoughts throughout the meeting. You could use different coloured post-it notes or pens to identify people's ideas not discussed in the meeting. Make sure you acknowledge contributions and discuss them next time.

6. Review the planned meeting plan with the group. Ask if anyone has something to add or clarify, and adjust as required. By making sure everyone agrees to the plan, it is less likely that the group will get side-tracked or go off on tangents.
7. Briefly explain the responsibilities of the people who have specific roles:
 - The Facilitator moves the conversation along in a respectful and time efficient way, making sure everyone has a chance to speak. The Facilitator is neutral and inclusive, and does not judge what other say or add their opinions.
 - The Contributors follow the agreed guidelines and participate in the conversation.
 - The Timekeeper helps the group stay on time.
 - The Scribe capture's people's ideas, the common themes, any decisions or action items, and general notes, in writing.
8. Acknowledge the two dimensions of collaborative work – Interaction and Action, and the contributions of each. Encourage the more action-orientated people to have 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.
9. Clarify and remind people of the decision making process you have selected as a group and will be using.
10. Get the group's agreement to proceed.
11. Lead the group through the planned activities and discussion questions. Suggestions for good discussion questions can be [found here](#). Be flexible in adjusting the plan, it is helpful to focus on future opportunities rather than present problems; a glass 'half-full' approach ^[66]. If people are focusing on problems or negatives, gently remind them and bring the conversation back on task. Some suggestions for helpful facilitation phrases are suggested here.
12. Know when a conversation is finished and when it's time to move on. Some examples of this are:
 - Overheating: People are arguing. Solution: Slow down, acknowledge each person's contribution and encourage more listening
 - Overcooking: The ideas are being repeated, and people are getting frustrated or impatient. Solution: Re-state what ideas have already been presented to the group or agreed upon and if time allows, invite only new or different ideas.
 - Undercooking: Everyone has not been heard, or commonalities are not yet apparent. Solution: Finish getting everyone's input, and continue asking the group to identify common themes.

Contributor's Role

Contributors have a huge opportunity to help shape and influence the outcome of the meeting or event, by spoken



words and behaviour. Attitude and mood on the day are just as important as what you say or do, education, title, age, or experience.

It is important Contributors always follow and respect the agreed Group Guidelines. In addition to these, it is important to:

- Stay focused – stay present mentally as well as physically during discussions. Bring your attention back to the group whenever you notice your mind wandering.
- Be curious – be willing to be surprised and to expand or even change your viewpoint.
- Speak clearly and briefly – ensure to speak one at a time. Make your key point without repeating yourself or rambling. Share your perspective as your truth, not the truth.
- Listen – listen thoroughly without interrupting, and without planning your response, so you can hear someone's meaning as well as their words.
- Be respectful – it's possible to appreciate that a person is contributing their point of view even if you don't agree with it.
- Notice judgemental thoughts – notice them as you have them, but don't voice them.
- Be open-minded – be willing to consider and include other viewpoints. Remember, in co-production, all contributions have value.
- Ask questions – ask questions that help clarify and understand, rather than criticise or persuade.
- Monitor your body reactions and emotions – if you notice yourself becoming agitated and moving into a 'flight, fight or freeze' response, take some deep breaths, or get up and move around. Re-focus and return to being curious as soon as you can.

The Scribe's Role

As the person scribing during meetings and discussions, it can be difficult to capture everything people say. The Scribe may need to ask people to repeat key points or ask the Facilitator to do this to support the Scribe's role during the meeting. Don't be afraid to ask people to repeat themselves and confirm what you have written down is correct. As much as possible, always try to write down the words people use, it's a natural instinct to interpret and filter but try to avoid doing this as much as possible.



HINT

Use butchers paper to record side topics or points off the main purpose, often referred to as a 'car-park', so all contributions are acknowledged.

Managing Group Dynamics

Bringing people together to discuss a topic they are all interested in, passionate about and potentially invested in will no doubt result in some form of relational conflict. The meeting Facilitator will be at an advantage to have strong group facilitation skills, including the ability to:

- Keep the group conversation on track
- Encourage quieter members of the group to speak up
- Not allowing dominant members of the group to ‘take over’ or control the conversation
- Be able to ask follow up questions maintain a position of curiosity
- Challenge assumptions or closed thinking
- Resolve conflict, both in meetings and outside of meeting settings

Another part of managing group dynamics is also potentially managing conflicting and dominant personality types, and this applies for both staff and consumers. As the Project Lead and Facilitator, it will help to build strong relationships with these people and to understand the values and experiences which have shaped their world view. Remember co-production is an asset based approach, so these people who are more dominant or like to be in control will respond well to being delegated tasks and responsibilities within the project action plan. Use their skills, strengths and gifts to progress the project, as opposed to seeing them as ‘difficult’ or ‘challenging’.



See Tool 6 to help your working group assess if you are staying true to the six principles of co-production. This tool will help the Facilitator and Project Lead identify and resolve issues within the group.

Pilot Site Example – MercyCare (WA)

We had one consumer who would talk quite a lot and go off on tangents which resulted in other group members disengaging from conversations. We had to find a way to manage it, and that’s when someone offered to be the timekeeper. No-one wanted to upset her and she had really good stuff to say so I would spend time talking to her between meetings. Sometimes I would spend 45 minutes on the phone with her – again this is time being used. This lady was self-aware though and realised she did this, you might have a problem if someone is not self-aware. The other group members asked me to speak to her otherwise we wouldn’t get anywhere.

Changes to the Working Group Membership

Given the nature of this work, and the cohort of people you will be working with, you may experience people resigning from the group due to ill health, change of job role, family and other commitments, frailty or death. The majority of the pilot sites in the Step Forward – Together™ project experienced a change of group membership between the education session provided by CommunityWest prior to the project commencing and the completion of the project eight months later.

As the Project Lead, you will have discuss and decide with the group whether the staff or consumer needs to be replaced and what impact their absence will have on the project.

If you do decide to replace members, or even add in new members after the working group is formed, it will take time for the new person to feel comfortable and for the group to feel as though they are ‘one of us’.

The experience of the pilot sites demonstrated the education session is extremely effective in building people’s understanding of co-production and establishing a positive group culture as the foundation of the project.

The Project Lead may need to work with new members to bring them up to speed one-on-one before they join the group. The Project Lead and Facilitator will then need to decide how they are going to assimilate the new person into the culture of the group effectively and build trust quickly between members.

This will require some fore-thought and strategy and may result in the group having to take a step back and re-invest time. This means your project timeframe will have to be extended to accommodate this.

The Project Lead may also wish to ask a consumer or staff member to be the new member’s ‘buddy’ to get them up to speed, chat about the project or ask any questions.

HINT

Consumers who come to project working groups after the initial training are at a disadvantage as it will take longer to re-form the group. When new members join you will need to build trust and rapport between existing and new members. This may take an additional meeting to do.



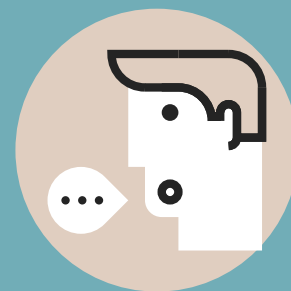
Integrate the Ideas ^[37]

This next stage of your project is about savouring what the group has co-produced by identifying or confirming common themes, acknowledging the group's accomplishments and taking a few moments to celebrate.

Facilitator's Role

The Facilitator's job is to help everyone own and celebrate the experience, before moving on to action planning.

1. Lead a discussion to identify and summarise common themes from the previous conversations. Having a conversation where everyone says what they think and then leaves is not co-production. It is important to identify the similarities between ideas and opinions expressed. Examples of effective questions to ask are:
 - What are the commonalities?
 - What words are coming up most often as the group talks about this?
 - What are the similar ideas?
2. Create charts which display the common themes
3. Celebrate! Have the group reflect on their experience of the co-production process so far. Encourage a spontaneous expression to acknowledge a sense of shared ownership and completion. E.g. everyone doing high 5's, group cheers etc.



HINT

Keep an ear out for those moments when the group becomes united, where everyone is seeing the same thing at the same time. Whenever you sense this has occurred, pause and have the group acknowledge their experience of unity. If that 'aha' moment is not happening, push the members to generate new ideas or re-visit the common themes. Often a creative breakthrough is just on the other side of the group 'hitting the wall'.



Contributor's Role

At this stage there is an opportunity for a profound shift in your perspective. Hopefully any fears you may have had of losing your individuality or being overpowered is now replaced by wonder at how ideas have blended together for a collective result. You may not even be able to remember which ideas were yours and which came from others. It is recommended you:

1. Pause and reflect on the experience which has occurred as well as the information shared. Allow yourself to feel gratitude for what has been created.
2. Share your reflections with others and record them, as per your project's methods.
3. Recognise you did this, and the group did this, and the outcome is both your own and owned by the project working group. You have become a 'co-producer'.
4. Celebrate what you and the group have achieved.



HINT

Appreciate what has been co-produced; no matter what it is or how it matches your expectations. Not every co-production meeting, conversation or event will be a '10/10'.

Plan the action^[37]

It is now time to digest all that has happened and turn the group's ideas into actions. A key for this step is balancing patience and momentum.

The action-orientated people are ready to define what actions are to be taken, while the interaction-orientated people may want to linger for further discussion. Finish every meeting by sharing who is going to do what and by when based on voluntary action^[66].

Facilitator's Role

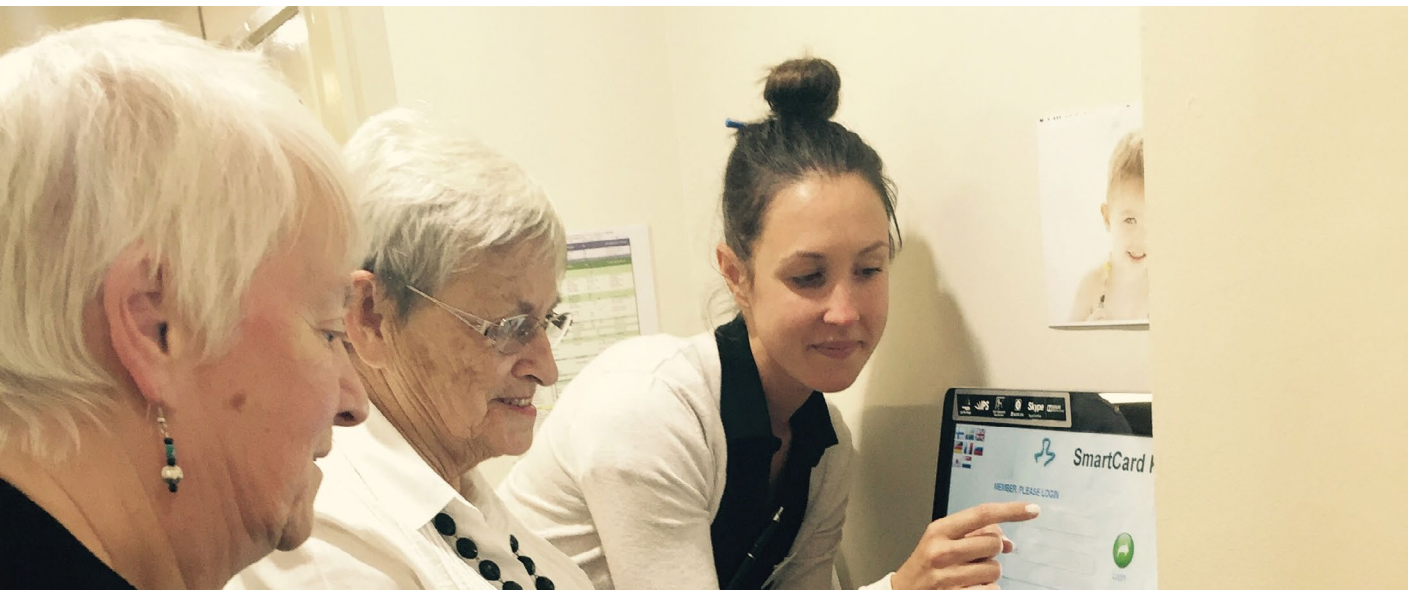
Your role is to help the group shift their focus from contributing ideas to discussing possible actions.



1. Get agreement from the group to begin forming an action plan. Here are some suggestions for questions you might ask:
 - Do we have enough common themes and ideas to begin creating an action plan?
 - Which of these ideas are we ready to take action on?
 - Reflecting on today's conversation, are we ready to move forward?
2. Lead a discussion which helps the group create an action plan. It may help to break into small groups by topic or issue. Make sure the following are included for each topic:
 - What will be done, by whom, by when
 - Identify sub-teams or committees if needed
 - If an action is assigned to a person not in the room, make sure someone present will communicate and follow up with them
 - List the resources needed, and the available or desired support (human, financial, etc.)
3. Confirm what the next steps are in writing. Be clear on who is accountable to do what and by when.
4. Determine when and how any follow-up meetings and/or communications will occur related to the action items.
5. Clarify what will happen with items not part of the action plan, but yet still need to be addressed.
6. Clarify what will happen and who will follow up items in the 'car park.'

HINT

Be sure to allow enough time at the end of each meeting to create the action plan, agree on next steps, and identify who will do what. Do not squeeze action planning into the last few moments.



Contributor's Role

Your job is to continue contributing as the conversation shifts from ideas to actions. Everyone needs to stay awake, engaged, and involved in the process in order to turn co-creative conversation into co-produced action.



1. Take responsibility for moving some part of the action plan forward. You may choose a specific task or project which is part of the action plan and sign up for it, or support others to do so.
2. Hold yourself and others accountable for what you say you will do. If you agree to do something, be clear what you are agreeing to, and do it.

Remember: No action plan = no action

HINT

Not every idea needs an action plan at this time. Focus on creating action steps for the topics where at least one person is willing to take responsibility.

Qualities of co-production activities^[36]

Specific tools and activities detailed in this toolkit must be considered depending on the topic being investigated and the nature of the participants. However there are several qualities which underpin most of co-production activities which help to make people’s everyday experiences available and create a platform for sharing^[36].

They are visual, expressive and creative

Co-production activities can include the use of visual materials as a way to assist people to make and communicate associations and experiences. Images are more accessible and quick to use (compared to written word for example) and participants are able to attribute their own meaning to them. Random images can remind people about significant things they might not have considered or can act as metaphors to represent complex concepts. Images are also evocative and help to provide multiple frames and ways of seeing and expressing. They can be ambiguous enough to allow creative and unusual connections to be made and leave space for people to explore their own interpretations. The process of selecting images can also act to generate valuable discussion between participants.

It may be helpful to begin a co-production meeting by asking participants to create a collage which describes their experiences about something related to the project topic. Visual storyboards can also be an effective way for participants to convey emotional experiences or journeys. In addition to what is created, it is the stories, memories and experiences shared when people communicate why particular images have been chosen or placed together which reveal significant insights.

They are physical and tangible

The act of physically getting up, moving around and using our bodies and hands to make and do things, to select, create, stick, sort, gather, glue and compose, both individually and in groups, is a central part of creating space for discussion, sharing and idea generation. This can include three dimensional examples made out of playdoh or card for example, but it also applies to the building of collages, maps and story boards, or the process of acting out an interaction or experience. All of these activities can act as prompts which help participants to explore, remember, imagine and verbalise aspects of their everyday lives, feelings or experiences. The physical act of working in close proximity with other people and creating something together is also an important part of fostering collaboration, trust and sharing between participants.

They support creativity through (appropriate) constraints

Part of facilitating people to be creative and participate in the co-production process is providing the right kind of constraints. Leaving things too open means participants

struggle for direction or to get started, defining things too specifically leaves little room for participants to take ownership and create something meaningful to them.

For example, when asking participants to generate or explore new concepts or ideas, you can ask them to incorporate a combination of words, images or concepts or make use of physical props such as playdoh when developing their idea. These elements act as constraints that create boundaries within which participants need to work, but they also become inspirational start points to leave enough room for participants to apply their own creativity, strategy and ideas. Activities such as building personas or scenarios also provide participants with a particular structure or format through which to think about, approach, explore and communicate aspects of the design.

For example having participants build visual personas can be a way to enable people to explore and contribute to interpreting and connecting with the idea. The concept and format of the ‘persona’ acts as a constraint which allows people to make sense of, and structure information, but also allows them to do so through their own words and images. The story itself, the process of negotiating and considering different perspectives and what should be included and represented and why, brings to light a range of details, experiences, needs and dependencies.

They are playful, fun and rewarding for participants

Fun is a deeply important aspect of co-production. It is central to building trust, confidence and facilitating sharing which will help people open up. It is also part of keeping people’s energy levels up. If people are tired and the activities too serious, it is hard for participants to maintain interest or contribute in meaningful ways.

This is particularly true if the topic is sombre or serious. It is our role to find a sensitive way of exploring such topics, but also one which allows people to open up and be creative. It can be very rewarding for participants to discover aspects about themselves they had not been aware of, or to think in new ways about a topic they had not stopped to consider before.

Participants often also value the opportunity to gain an understanding of other people’s experiences and perspectives. Ensuring the activity is interesting and rewarding for participants is also critical when seeking participation and input to important topics which have a significant impact on people, yet can be perceived as potentially ‘boring’, unappealing or stigmatising.

Co-production meetings and events are key relationship building activities and sessions should always be enjoyable and energising (though also often exhausting) as well as productive.

Cognitive and Context Mapping

This is the process of creating mind maps of abstract concepts, events, processes, routines, experiences, or systems. The materials used here are symbolic elements such as arrows, regular and irregular shapes, and some distinctive icons or words. These tools should help express the flow in a system or process alluding to both negative and positive aspects^[47].

Task Analysis Grid

The aim is to see the entire scope of an experience, tasks, and activities in a schematic description. A scheme of tasks is made. Each column starts out with a scenario, describes a task and is followed by all the sub-tasks necessary to complete the task. The sub tasks are colour-coded and prioritised. Influencers and pain-points are highlighted for each task in order to complete the whole description. This results in a schematic view of experiences, tasks, activities and their relevance along with an overview of who are performing each activity^[46].

To see an example of this [click here](#).

System Map

The aim is to make a systematic drawing of the service in order to understand roles, flow of material, energy, money and information between people in the service. Link the roles and people together and describe the type of flow between them (money, material, energy, information etc.). You can use both text and pictograms in a visual representation: use of colours, the different sizes of the objects and the way in which they are related inside the visualisation help reading the map and understanding the system. This activity will result in a systemic overview of the service and the flow between the involved people who contribute to it. A system map identifies stakeholders who can be engaged, in order to scale up and reproduce co-production initiatives^[46].

Stakeholder Map

Stakeholder maps generate a map of staff and consumers operating in a context and their mutual relation. Actors are placed on a map; and connection lines link them and specify the nature of their interaction or relation. This provides a systemic view of a context, including people operating in it, their roles and their interactions^[46].

Touchpoint Mapping

A touchpoint is any point of contact a consumer has or will have with your service. Touch points may be tangible or provide tangible evidence of services. The basic idea is to provide a visual framework which enables organisations to “connect the



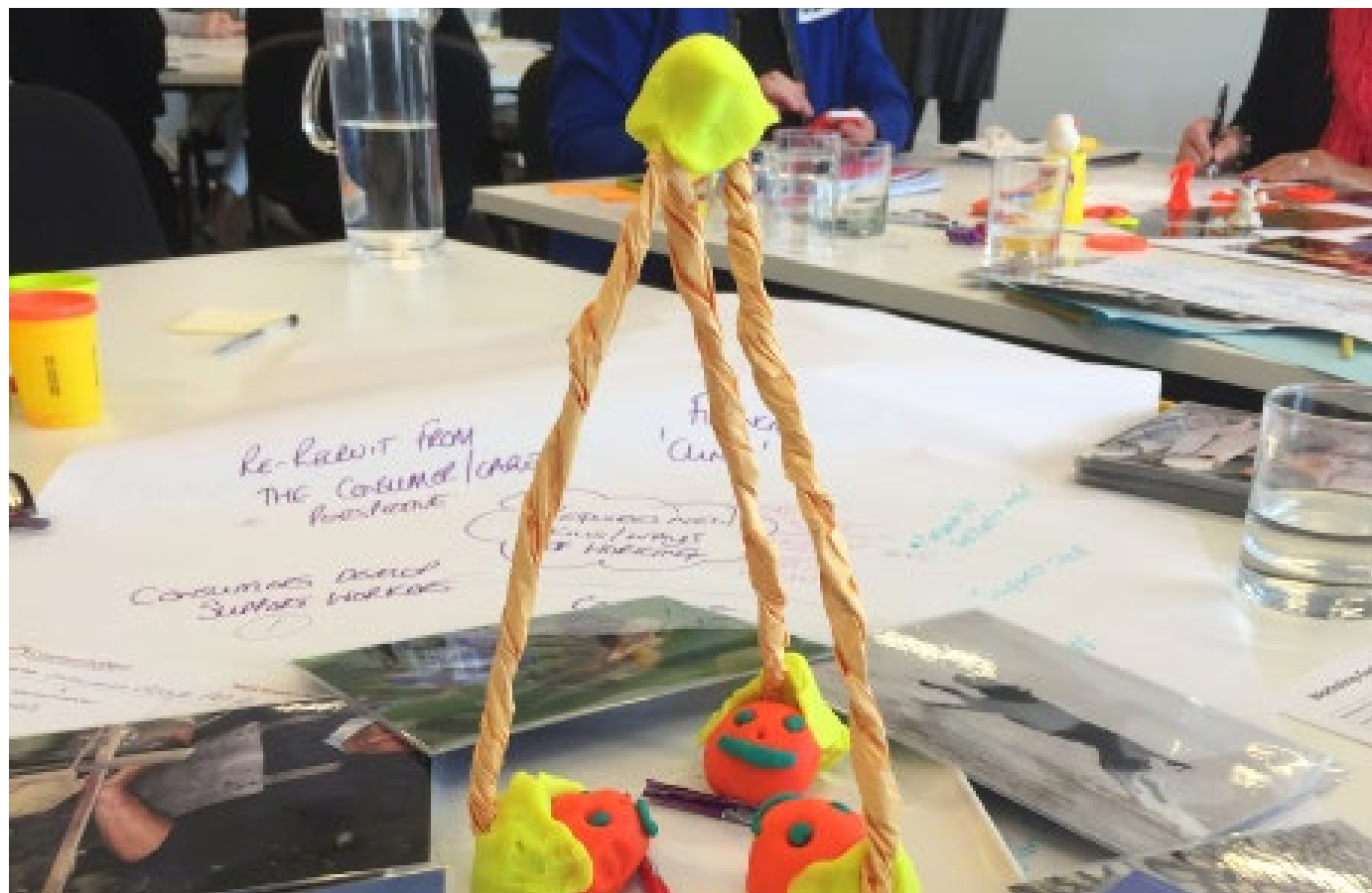
dots of the consumer experience” in order to see the different contexts and results of the interaction with a specific service. The matrix is built by listing vertically the different parts of the service and by listing horizontally the main actions that support them. Once this structure has been developed, you can put a specific person inside and imagine their journey through the different touchpoints, connecting the related dots^[46].

To see an example of this [click here](#).

Blueprints

The blueprint is an operational tool which describes the nature and the characteristics of the service interaction in enough detail to verify, implement and maintain it. A visual representation of the service is drawn. In the diagram you distinguish between actions, roles and interactions in front and back office of the service. The blue print is based on a graphical technique which displays the process functions above and below the line of visibility to the consumer: all the touchpoints and the back-stage processes are documented and aligned to the consumer’s experience^[46].

To see an example of this [click here](#).



Co-production in Practice

Practical tools and activities



Life Snapshot



Storyboards



Post-it Session



Touchpoint Mapping Template



Four Box Template



Future Improvements Template



Collages



Scenario Template



World Cafe



Stakeholder Needs Template



Personas



Improvement & Benefits Template

Prototyping, Testing and Piloting

A typical co-production project has at least two different parts; one where people discuss experiences in order to develop ideas, and the second being testing, trialling and prototyping any new activities, programs, resources, products or services you develop as part of your co-production project.

You will need to factor this in to your timeframes and resource allocation. You need to ensure what you co-produce will work for the people who will be using it, whether it's staff, volunteers, consumers or carers.

Prototyping is an approach to developing, testing, and improving ideas at an early stage before large-scale resources are committed to implementation. It is a way of project and team working which allows you to experiment, evaluate, learn, refine and adapt, ensuring ideas are fully explored before any conclusions are drawn.

Prototyping:

- Involves relevant people at an early stage
- Develops ideas with the people who will help you find the answers
- Makes ideas tangible and tests them
- Informs and improves any eventual project framework for change

Why would I use a prototyping approach?

- Prototyping allows you to try out your ideas without the pressure of getting everything right straight away.
- Prototyping also enables you to involve a wide range of stakeholders in the testing process, providing a better understanding of how your ideas will work.
- Compared to a pilot, prototyping is a low cost process and can be done within short to medium timescales.
- Prototyping also provides an iterative learning approach so ideas can develop as you go along.
- You should think about prototyping before you start thinking about piloting. Prototyping is not an alternative to piloting. It helps you build a better specification for what a pilot might be. It may even help you see your idea isn't going to work and save you the time and cost of a pilot.

Think Public (UK) and NESTA (UK) have developed a framework for prototyping which CommunityWest recommends as a useful resource.

Prototyping Techniques

Physical stuff (e.g. products, packs, rooms, components)



Scale Modelling

Create a small-scale model of anything that is too large to be replicated at full scale.

Simulation with materials to hand

Use commonly available materials as substitutes for physical elements to explore.



Information (e.g. apps, signage or leaflets)

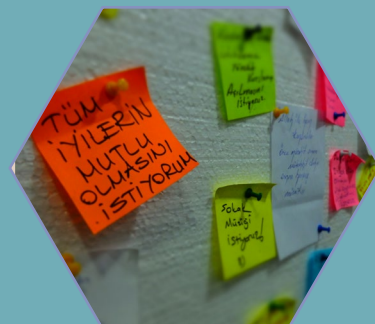


Become the robot

Use this technique if your idea will require a user to interact with any kind of machine.

Paper prototyping

Simulate what happens when you click on keyboards or interact with screens.



People (e.g. meetings, phone conversations, online interactions)



Experience prototyping

Involves mocking up the physical aspects of a new product, service or process.

Role playing

Use each other as amateur actors in a drama to portray the new product, service or process.



See the following tools to help you with prototyping and testing your ideas.



Scenario Template



Personas



Stakeholder Needs Template



Prototype Evaluation

Pilot Site Example – The Society of Saint Hilarion (SA)

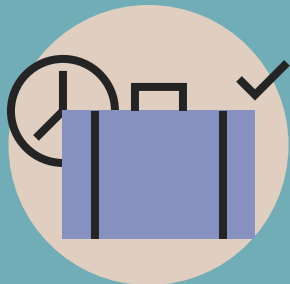
The project Steering Group identified we were too time poor to test our quality of life measurement tool with the Italian community so we enlisted the help of university students to test the tool with social centre, packaged care and residential clients. We had two students go along with a consumer from the steering group and interview a client in Italian. The consumer translated and explained the response to the students who documented and collated the information.

End with clarity^[37]

When your co-production meeting is over, and your action plan is determined, cleaning up is the last step. This includes confirming the working group’s next steps, inviting closing comments, and making plans for creating and distributing the meeting notes.

Project Lead’s Role

As the Project Lead, thank people for their time and participation in the co-production process. Comment on what has moved you, or been meaningful.



Facilitator’s Role

Your job is to bring the meeting to completion by:

1. Identify how the meeting summary will be compiled and distributed.
2. Clarify about future meetings or events, including when, who will host them, who will be invited and how people will be notified.
3. Lead a brief closing discussion. Help people review and reflect on what happened and what they experienced. Examples include:
 - What was accomplished here?
 - What did we learn?
 - What benefit did you gain from being involved?
 - What are you taking from this for use in other situations?
 - What might we do differently next time?
 - How would you describe your experience here today?
 - How did you feel supported in your role as a group member?
 - How have your confidence and skills improved using co-production?
 - Do you feel you contributed to decision making?
4. Discuss how and what to communicate to people not present who may be interested.
5. Ask members to help re-set the room, take down charts etc.



Contributor’s Role

Your job is to continue to be a positive contributor. Don’t physically or mentally check out before the meeting has ended. After its over and you receive the notes:

1. Make sure you follow through on the actions you agreed to, support others, and continue communicating.
2. Assist others in accomplishing their tasks rather than judge or blame.
3. Communicate – let people know when your task is complete. If you cannot do what you agreed to do, or in the agreed timeframe, let people know and discuss alternatives. You may need to find someone else to complete your task; or get agreement it doesn’t need to be done.



HINT

Put discussion points, common themes and action plans in writing and distribute a Summary Document widely after the meeting or event. Don’t assume everyone will remember what was discussed in the same way.



Pilot Lead Training 23rd July 2015

Review

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

Co-production is not a one-off activity. Successful co-production will introduce changes to systems which will lead to the ongoing review, development and delivery of new forms of support^[60]. Review and evaluation are an essential part of any co-production project or initiative^[2, 60].

It is important the review process is carried out with people who use services and measures what matters, including the outcomes people who use services actually want^[31, 60]. Co-producing a project with people who use services has a powerful effect on all aspects of the project and it helps to focus on the experiences and expectations of everyone involved, adding authenticity to the reporting of the findings of the project^[34, 60]. Evaluation of a co-production project should itself be co-produced^[16, 60]. Co-production evaluations tend to focus on the process of participation rather than its impact, both need to be evaluated so they can be improved:^[60]

- Carry out regular reviews to ensure co-production is making a real difference and the process is following the agreed principles.
- Co-produce reviews and evaluations.
- Use the review findings to improve ways of applying the principles of co-production, so continuous learning is taking place.



During reviews and evaluations, work with people who use services and carers, to think about ways of showing the impact co-production has, as well as the processes involved.

Review plays an important part in monitoring the progress which has been made in involving consumers in co-production, in recognising the achievements made, and identifying what improvements still need to be done. Without it, it is impossible to assess the quality of your project plan.

Review consists of collecting information about a program or service to make a judgement about its quality, value or importance^[59].

Consumer Reflection – Uniting AgeWell (VIC)

The Steering Group worked together to develop the questionnaire we would give to gym participants. Each person contributed something different, based on their professional knowledge or personal experiences. Everyone in the group approved the form before it was sent out to people.

Ending Well

At some point your project will come to an end, as it did for the ten pilot sites in Step Forward – Together™.

The pilot sites reflected they didn't consider the 'ending' of the process and this was a learning for them. They found the consumers and staff were so invested in the project that when it ended, they were sad it was over. The consumers in particular had enjoyed being part of their Steering Group's and looked forward to each meeting, so the end of it needed to be acknowledged and dealt with gently by the organisation.

You may have achieved more than you thought you would, something different to the original plan, or not what you set out to complete at all. Regardless of this, it is very important the working group are celebrated for what was done, no matter how small, and most importantly acknowledged for how the group worked together to the principles of co-production.

The majority of the pilot sites organised a special meeting or lunch event to thank everyone for their contribution and to celebrate what had been achieved together throughout the eight months.

This gave the pilot sites an opportunity to gain closure on what had been realised and also discuss future plans for co-production outside of the Step Forward – Together™ pilot project.

It's also important to recognise the special relationships and friendships which have been formed during this time and consider how you keep those relationships going to improve the experiences for current and future consumers of your services.

They (consumers) felt such a part of this, they were really sad it's over.

Now we've stopped, I'd hate them to go back to thinking they're just a 'client' now.

Bev Wheeler – Pilot Lead
MercyCare (WA)



CommunityWest recommends the following strategies to ensure your project ends well:

- Acknowledge the end before it happens, plan for it with your working group and decide together how you think it should end (co-produce it!).
- Hold a special event as a formal closing of the project e.g. lunch or event for working group only.
- Present the outcomes of your project to other people (organisation or community) so there is a clear result for all involved.
- You may wish to acknowledge people's contributions through gifts or certificates of appreciation.
- Take a group photo and provide a copy to everyone.
- Write personal 'thank you' cards for each member of the group. You may wish to use **Activity 5** to do this.
- Keep people updated with the progress of new programs, services or initiatives as a result of the work they have done. Remember people will feel invested and a sense of ownership over the result of the project, so it is important to keep them informed for a period of time after the project completes.

Reviewing Wellness and Enablement Outcomes

The shift to an outcomes focus

Collecting information and reporting on information in a way which starts with people's quality of life is not the same as measuring the quality and quantity of the services being provided to them. In the international and national context, measuring the quality of care and using those measurements to promote improvements in service delivery, to influence payment for services, and to increase transparency are now relatively commonplace in the health sector and are increasingly evident in community care.

The Wellness Philosophy has been signalled as the key concept in broadening the focus of aged care to include providing services in ways which maintain and promote independence, as well as helping to avoid premature or inappropriate admission to long term residential care. From discussions with community-based agencies it is clear many are developing their own programs which rely on quality measurement and reporting ^[52].

Based on their extensive program of research with older people, the team at the University of York ^[35] identified three 'clusters' of desired outcomes for consumers. Key to the success of this approach was recognition the outcomes must be the service user's own expression, in everyday language with which he or she is comfortable, of his or her aspirations for the service(s). Outcome measurement used in this way is meaningful for consumers and can actively involve them in thinking about and planning for their own care and support. It is also an effective way of moving from the over-rigid prescription of tasks and times in traditional service models to a service which is more able to respond to consumers changing needs and preferences ^[56].

Maintenance Outcomes

Maintenance outcomes are those which prevent or delay deterioration in health, wellbeing or quality of life. These may include meeting basic physical needs; ensuring personal safety and security; living in a clean and tidy environment; keeping alert and active; having access to social contact and company; and having control over everyday life.



Change Outcomes

Change outcomes relate to improvements in physical, mental or emotional functioning. They can include improvements in symptoms such as depression or anxiety that impair relationships and impede social participation; in physical functioning; and in confidence and morale.

Process Outcomes

Process outcomes refer to the experience of seeking, obtaining and using services. Process outcomes are important to the extent they can enhance or undermine the impact of services which might otherwise appropriately address change and/or maintenance outcomes. Process outcomes include feeling valued and respected; being treated as an individual; having a say and control over how and when services are provided; perceived value for money; and compatibility with cultural preferences and informal sources of support.

Service-led output vs outcomes-focused approaches ^[44]

In aged care the case needs to be made more clearly about how the concepts of outcome measurement work and why they are relevant to improving the quality of services. A useful summary below compares outcomes focused approaches with service led output approaches.

Service-Led Output Focused	Outcomes Focused
Current tools encourage information gathering through standardised question and answer approaches to assessment, support planning and review	Decision making informed by semi-structured conversations with individuals in assessment, support planning and review
Tick box approach to assessment	Analytical skills involved in assessment
The person's views may be included in decision making	The person's views/preferences are central to decision making
The person is viewed as a client, service user or patient	The person is a citizen with rights and responsibilities
Where needs link to strict eligibility criteria, the assessor is required to maximise individual difficulties to access services. Involves consideration of difficulties, limitations and aspirations or goals	The priority is to identify what to work towards
If the person is deemed eligible, identified needs are matched to a limited range of funded services, resulting in service driven approaches	Identifying outcomes involve considering a range of solutions/strategies including the role of the person, family supports and community based resources
Where needs are tied to eligibility criteria, preventive work with people with low level needs may be excluded	Outcomes allow preventive work to take place while services and resources are prioritised for those most in need
Focusing exclusively on deficits and difficulties, and how needs are to be met, results in a focus on tasks and in services which do things <u>to</u> people	By focusing on strengths, capacities and goals, while mindful of limitations, the role of the person is maximised. Services do things with people (enablement)
Matching needs/deficits to services tends to result in static service delivery	Outcomes may change in the person's life journey and so should be revisited
Where outcomes are identified, these tend to be professional or organisational outcomes e.g. improved nutrition, or avoid delayed discharge	Outcomes are what matter to the person, though often consistent with professional and organisational outcomes e.g. being able to get out and about
Starting from what services are currently available restricts communication and limits options	Starting from the person's priorities supports enabling relationships, creates clarity and identifies goals at an early stage. Being listened to, involved and respected results in better outcomes



Reviewing co-production

Practical tools and activities

There are online resources you can access to self-assess and evaluate co-production learnings. Have a look at the [NEF's co-production self-assessment framework](#), a working reflection tool for practitioners. This tool helps practitioners to review their own practice in relation to the key components of co-production.

In addition to this, the Integrated Resource Framework Programme has developed a [co-production learning template](#) to help people reflect upon their practice. It asks a number of questions to guide people in how they might effectively structure learning from their work. It is particularly useful as a guide which can be used when writing up your case study on co-production.



Wellness and Enablement Self-Assessment Tool



Co-production Checklist



Biggest Difference Template

STEP FORWARD 
TOGETHER™