

A CO-PRODUCTION TOOLKIT





A toolkit to help with Co-production

This Co-production toolkit has been designed by Jersey Recovery College drawing on our experiences of designing and facilitating pieces of co-production.

It is advised that this is used alongside *A Co-production Framework for Jersey's Mental Health Services* and *A Co-production Framework: A reflective case study.* It is also advised that anyone undertaking a piece of co-production work connects with The Co-production Network – a group of people passionate about embedding co-production in our mental health system. Within the Co-production Network sit trained and experienced Practitioners who can help with your piece of co-production. Please access the Network via Jersey Recovery College.

Jersey Recovery College hello@recovery.je
01534 505977
www.recovery.je



A word to the wise

There is no "one size fits all" or template for Co-Production. This toolkit is intended as a guide and resource to support you to carry out a piece of Co-Production. As it is about power sharing and joint decision making it is important to have a shared vision and shared understanding of co-production with all participants.

Choosing co-production Considerations before you start **Thinking** Scope of work An ethical approach Valuing the process **Planning** Terms of Reference Stakeholder mapping · Power dynamics matrix / Macro power dynamics Recruitment and accessibility Recruiting Risk and support • Power up / Power down Facilitation tools Budget and renumeration Participation engagement methods Event planning Evaluation tools ·Workshop / project reflection Sharing information and work

Tips for closing the work



THINKING

Choosing co-production

What is the nature of the work, who has asked you to do it? What are their expectations?

Is co-production the right methodology?

Before starting your piece of work, read through A Co-production Framework for Jersey's Mental Health Services (2023) this covers:

- When you should use the Framework / Co-production
- Your accountability when using the Framework
- A definition and principles of Co-production
- Where co-production sits alongside other forms of engagement

Our definition of co-production

Co-production is where a diverse and representative group of people come together to work as equals. It's a strengths-based approach combining everyone's skills and experience in a safe environment. This involves working together, trust, respect, and sharing power. Co-production broadens and deepens understanding; that means, we can guide the delivery of the right solutions and services for all."

Other definitions of co-production and consultation (it's really important to recognise the difference)

"People Powered Health... transforming the perception of people from passive recipients of services and burdens on the system into one where they are equal partners in designing and delivering services."

Nesta

Co-production is about everyone coming together, pulling resources and abilities, building on each other's potential, to identify problems and then to solve them. The problems could be in health, environment, housing, wellbeing, it doesn't matter what it is but it's all of us working together."

Co-production Wales

"Consultation is technically any activity that gives local people a voice and an opportunity to influence important decisions. It involves listening to and learning from local people before decisions are made or priorities are set."

Local Government Association

Types of consultation: Focus groups / Surveys / Written consultation / Forums / Seminars / workshops / Website / Public meetings / Roadshows (*Dover District Council*)



Other Considerations before you start

Consideration	Why this matters
Will this work make a difference?	When people sign-up to a piece of co- production, it's important that their involvement is respected and that it is meaningful. Be clear from the outset the level of impact/change the work will make. It's important to ensure you have that commitment in place with decision makers before you start the work. It is a matter of trust between service users, service providers and commissioners/funders.
Is this a commissioned piece of work?	If this is a commissioned piece of work it will have Government endorsement, meaning the outcomes of the work should be respected and implemented. However, we cannot predict the outcomes of true co-production so a commissioned project needs to have flexibility built in from the start.
Have you liaised with other agencies / government to explain what you'd like to do?	It's important to connect with other stakeholders to ensure work is not being duplicated and that any previous work of a similar nature can be shared and built upon. This also helps engage different stakeholders from the start.
Do you have commitment from commissioners / management to support the co-production process?	The people ultimately responsible for the funding and approval of this work must commit to the process. Co-production takes time. It can cost more in the short-term (although often leads to longer-term savings). It can also lead to outcomes not expected.
Do you have the resources to do a piece of co- production? Is there a shared understanding of co-production?	The co-production process requires dedicated resource. It needs a project manager / facilitator, admin support (this can be covered by the facilitator), and a budget to cover renumeration of participants and room hire and refreshments. Without these it will be very hard to make the work a success. It's important to note that these roles are skilled. You must also consider bigger timeframes. If you are building a case for a new service or



	service enhancement, there may be a funding cycle you need to align with. It's important that everyone involved in the project has a shared understanding of what co-production means. The work needs skilled facilitators who understand co-production and who should be trained in how to facilitate the work.
Are there existing frameworks, policies, or strategies you need to adhere to?	It's important that any piece of co-production work fits in with the bigger picture. See A Co-production Framework for Mental Health Services in Jersey. Do you have organisational policies that should be followed? Such as codes of conducts, charters, health and safety policies, risk policies, equality and diversity policies. It's also important to think about how you're work fits into wide strategies such as a mental health strategy, the disability strategy.





PLANNING

Scoping the work
ssue being worked on:
Parameters
What can be influenced and what can't (be clear) –
What is your time frame –
What is your budget –
Project Outcome – Co-Production work –

An ethical approach

In health and social care research formal ethical approval is needed to collect data from patients or service users in a research study.

Co-production is different as it is a collaborative process, with service users being considered 'colleagues' in the piece of work.

An ethical approach is, however, critical in co-production to ensure people are protected, that all participants are treated equally and have a positive experience, and that their efforts are rewarded with a commitment to implement the work.

See the Statements of Accountability in *A Co-production Framework for Jersey's Mental Health Services* for ethical considerations.

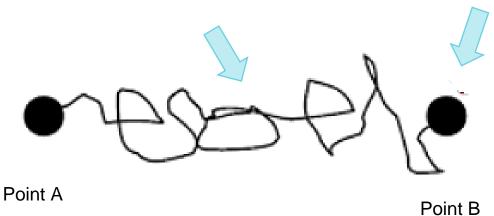


Valuing the process

How do you want people who take part in this work to feel during it and afterwards? Hat feelings objective to the work.					rds? Have a

The end result has value

The process has value



Trust the process – even when it feels messy.



Terms of reference

Create a Terms of reference for all groups working in the co-production. Your Oversight Group may have a different Terms of reference to your Participants. Example Terms of Reference https://www.kmpt.nhs.uk/media/2599/co-production-terms-of-reference-13.docx

Scope

Define and describe the issue / area being worked on.

What can be influenced and what can't (be clear).

Membership

What defines a member, are there limits to size of group, time, number of meetings members have to attend. This is linked to your Stakeholder mapping; you may want to identify groups rather than individual people depending on the size of the project.

Meetings / how we will work

A co-production methodology will be applied to tasks with individual or smaller sub-groups tasks being allocated as needed and with the project growth.

Frequency of meetings for different groups steering group / working groups. Remit of groups

What behaviours do we expect?

Create a group agreement – co-produce it. Refer to *A Co-production Framework for Jersey's Mental Health Services*. See example below created and used by the Participants in the co-production of the Co-production Framework.

How will we know we have succeeded? (Success criteria)

Refer to A Co-production Framework for Jersey's Mental Health Services. Create your own.

How will this be evaluated?

We want to know if co-production is having an impact. Once you have identified your success criteria it is useful to think about evaluation to keep work focused and moving forward.

Set realistic goals – x will be achieved by

Set a mood goal – the group will feel x

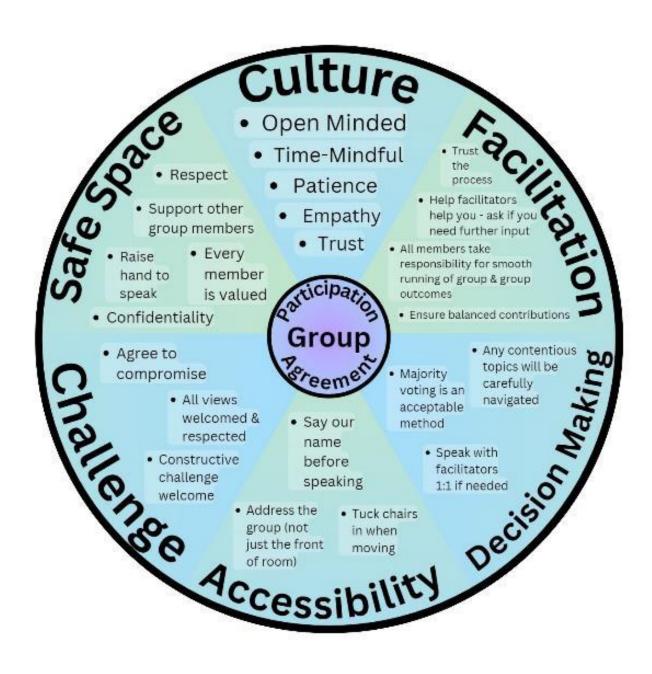
Once you have set and agreed your goals, have regular review points where progress is evaluated and reviewed.

Review

How often you review terms of reference.



Example of Group agreement designed by Participants in Co-production Framework project:





RECRUITING

Stakeholder mapping

It's important to spend some time thinking about who your stakeholders are and how much they will be involved in your piece of work.

Some stakeholders will have a lot of involvement. Some will be brought in a certain points throughout the project.

Within each stakeholder group you will have some people who are more involved than others. For example, you may choose to create an Oversight Group with representation from all your stakeholder groups – this group will be heavily involved in the piece of work.

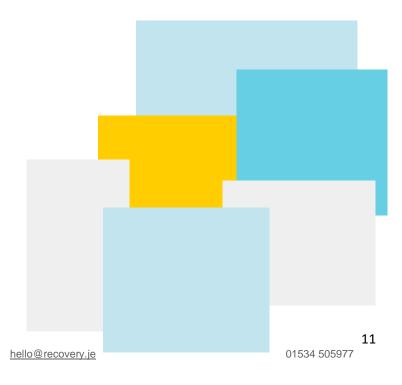
See A Co-production Framework for Jersey's Mental Health Services for:

- Who to include in co-production and what language to use
- The strengths different groups bring to co-production
- What motivates people to take part in co-production
- Different groups to consider involving and how to engage them
- Barriers and solutions to participation
- Inclusivity: Engaging harder to reach groups

Do not underestimate the amount of time it takes to recruit people to co-production work. By working through all of the above and some of the templates below you increase your chances of success.

We recommend working to participant groups of around 12 people. This group should be an equal balance of numbers from each group.

You will need to consider how to engage more representation and voices in the work.





How to create a stakeholder map

Government	Third sector / private	Frontline staff	Lived experience / Carers

Once you've listed your stakeholders, number them 1-3 in terms of level of involvement required. 1 being very involved, 3 being marginally involved.



Power Dynamics Matrix

Co-production brings together those who fund services, those who deliver services and those who access them. There are those who traditionally 'hold power' and those who do not.

Power dynamics are unavoidable in co-production and should be addressed openly so they can be managed as effectively as possible.

Recognise that each stakeholder group brings different socio-cultural biases. Each brings different life experiences. Each brings different assumptions and expectations of the other.

We can work towards neutralising power dynamics in co-production work, but first we must identify where the power and interest sits.

Plot stakeholders on the matrix below to identify where existing power dynamics exist.

4	
High	
Power	
Low	
ļ	



Macro power dynamics

It's useful to also think about power on a macro level. On the grid you can see the traditional model (professionally designed and delivered). The other end of the scale is user created and delivered services, but this is just really handing power from one group to another. The sweet spot is in the middle, where we work together to design and deliver.

		Who designs Services?			
		Professionals	People and Professionals	People using services	
	Professionals	Traditional services			
Who delivers Services?	People and Professionals		Recovery College		
	People using services			User organised and run peer networks	

It is useful to think about who is designing and delivering services. If you are using coproduction as a model somewhere in the middle blue zone is the ideal.



Recruitment and accessibility

It's important to consider how you are going to recruit different stakeholders to the work. Different people will be motivated by different things and will need to be communicated with/recruited in different ways. It's important that the work is accessible to all. See A Co-production Framework for Jersey's Mental Health Services for more thinking on this.

	Lived experience / Carers	Government	Third sector / private	Frontline staff
Who?				
What do they bring to the work?				
What do they get out of the work?				
How do we recruit them?				
Potential barriers for inclusion and ideas to overcome them				



Risk, protection and support

When carrying out work it is advisable to consider potential risks to the project to ensure success. Risks can be internal or external and include (but not limited to): risks to people involved, timeline, budget, staffing, reputation.

There are always going to be risks working with groups of people and when engaging the public it is worth considering risk, safeguarding, training and support.

When carrying out a piece of co-production give some thought to risk around:

- Conflicting messages
- Accountability
- Cost
- Staff capacity
- Representation (stakeholders)
- External pressures (partners / other organisations)
- Reputation



Risk aware vs. Risk adverse

- Attract a broad range of voices try to engage with difficult to reach voices, minority groups and other community projects relevant to your scope
- Link to wider safeguarding and risk policies ensure consistency with existing policies
- Managing concerns be clear about lines of reporting and how concerns will be handled
- Expect problems Forewarned is forearmed and if facilitators are aware of issues beforehand, they can prepare for managing potential difficulties
- Support everyone involved co-production is part of the bigger "strengths-based" perspective. How will you create a sense of community?

Thinking proactively about how you can support certain participants will ensure everyone has a positive experience of the process.



The **Risk Assessment Matrix** is used to assess potential risks and conflicts and identify a risk rating

The Risk Management Tool is used to record risks, ratings and potential mitigating solutions

Identify potential risks for the work:
And there are increase around norticinent protection (if any)
Are there any issues around participant protection (if any):
What support can be provided for participants:

It's important to be proactive about protecting the wellbeing of all those involved in the co-production. Co-production can be emotionally draining work.



RISK ASSESSMENT MATRIX TEMPLATE

	LOW	MEDIUM	HIGH	EXTREME	
RISK RATING KEY	0 - ACCEPTABLE	1 – ALARP (as low as reasonably practicable)	2 – GENERALLY UNACCEPTABLE	3 – INTOLERABLE	
	OK TO PROCEED	TAKE MITIGATION EFFORTS	SEEK SUPPORT	PLACE EVENT ON HOLD	
	SEVERITY				
	ACCEPTABLE	TOLERABLE	UNDESIRABLE	INTOLERABLE	
	LITTLE TO NO EFFECT ON EVENT	EFFECTS ARE FELT, BUT NOT CRITICAL TO OUTCOME	SERIOUS IMPACT TO THE COURSE OF ACTION AND OUTCOME	COULD RESULT IN DISASTER	
LIKELIHOOD					
IMPROBABLE	LOW	MEDIUM	MEDIUM	нісн	
RISK IS UNLIKELY TO OCCUR	-1-	-4-	-6-	- 10 -	
POSSIBLE	LOW	MEDIUM	нісн	EXTREME	
RISK WILL LIKELY OCCUR	-2-	- 5 -	- 8 -	-11-	
PROBABLE	MEDIUM	HIGH	HIGH	EXTREME	
RISK WILL OCCUR	-3-	-7-	- 9 -	- 12 -	



Risk Management Plan

Project	Plan prepared by:	Date:

RISK	RISK LEVEL Severity x Likelihood	MITIGATIONS / WARNINGS / REMEDIES / RESPONSIBLE PERSONS	RISK LEVEL Severity x Likelihood	ACCEPTABLE TO PROCEED?
	- LOW - MEDIUM - HIGH - EXTREME		- LOW - MEDIUM - HIGH - EXTREME	YES / NO

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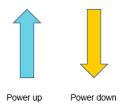


DOING

Power up / power down

Some parties will hold PERCEIVED more power and some will hold PERCEIVED less when entering into co-production work. You can POWER UP / POWER DOWN different participants through the way you plan and facilitate the work.

Please note: We strongly recommend using skilled co-production facilitators to facilitate the work as managing power dynamics and facilitating shared decision-making can be challenging.



Facilitators tools:

- A shared understanding among all participants of what co-production is before the work starts, particularly the power sharing aspect.
- Pre-work training, video, briefing papers, communications
- Participant introductions Get to know you one pagers; inclusion checklist; informal get to know you meeting first; name badges (first name only), introduction (don't say roles, say something else)
- How, where and when to hold meetings Hold meetings in neutral spaces, dress code (if possible), renumeration; terms of reference, varying times of meetings;
- Who is in the room balanced representation;
- Give all information ahead of sessions / briefing papers.

See A Co-production Framework for Jersey's Mental Health Services for guidance on removing barriers for equal participation.

Spend time getting to know each other

One of the most straightforward tools in managing power dynamics is helping participants connect as people, leaving their roles behind. The more time you spend on supporting the group to get to know each other as people, the quicker and easier trust will build and shared decision making will be more straightforward.



Facilitation tools: One Page Profile

A one-page profile is a useful tool for co-production. Completing and sharing a one-page profile helps to build key elements of co-production:

- It **blurs distinctions** by having the same level of personal information sharing across the whole team or group
- It creates **reciprocity and mutuality** by creating a shared understanding of everyone's support needs
- It takes an **assets-based approach** by asking everyone to highlight what others identify as their skills
- It builds on existing capabilities by highlighting what is important to everyone.

One Page Profile		
Name:	Age:	
		PICTURE
What People apprecia	ate about me:	
What is important to n	ne:	
How to support me:		



Facilitation tools: Inclusion checklist

Name:								
How do you like to be addressed?								
He/hin	า		Her/she	They/them	Other			
To include m	e, please k))	Tick	Comments				
Hearing	(((, 5)							
Vision								
Physical	(M	9						
Medical	(77)							
Speech		7						
Language)						



r			
Religion			
Social interactions			
Food			
Mental health			
Literacy	B		
Environment			
Gender / sexuality	*		



Budget considerations / renumeration

You need a co-production budget that should be separate to (or included in) your overall project budget. This should include:

- Your time / administration time
- Participant's renumeration
- Workshop / event costs
- Survey costs
- Transport costs / expenses
- Marketing costs

Please see A Co-production Framework for Jersey's Mental Health Services for:

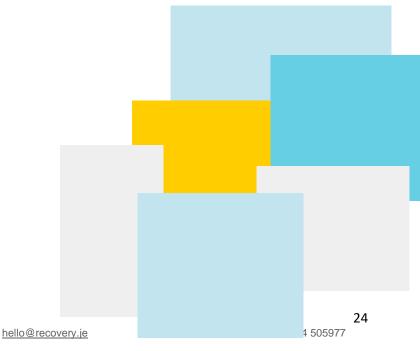
- The group benefit of co-production
- Payment for participation in co-production

It's important to consider remuneration in your budgeting as it is an important part of neutralising power dynamics and ensuring all participants feel valued and are getting something out of the work. Most professionals will attend co-production work as part of their jobs, they are being paid for their time. People with lived experience are often volunteering, and sometimes taking time off their jobs to attend. To ensure everyone's contribution is valued, remuneration is important.

Remunerating people for inclusion in co-production is challenging as there is often uncertainty over how much to pay, how to pay and which processes to follow. It's important to consider these and discuss them with your inhouse teams

"Many ethical and practical issues are involved in recompensing people for their involvement, and they demand care and attention. Payments need to be legal and non-coercive. They should not leave the person worse off, harm their relationship with the benefits agency, discourage them from obtaining paid work, or inadvertently establish a contract of employment."

Considerations: Impact on participants benefits, tax etc.





Simple project budget example

Task	Project	staff costs	Particip	ants costs	Materials	Budget	Actual cost	Balance
	Hours	Hourly rate	Hours	Hourly rate				
Project planning week 1	30	20				570	570	0
Participant costs workshop 1			3	20		90	60	30
Venue workshop 1					£300	300	350	-20
Refreshments workshop 1					150	150	100	30

Simple project budget template

Task	Project	Project staff costs		ants costs	Materials	Budget	Actual cost	Balance
	Hours	Hourly rate	Hours	Hourly rate				



Participation engagement methods

There are different methods you can use for participation work.

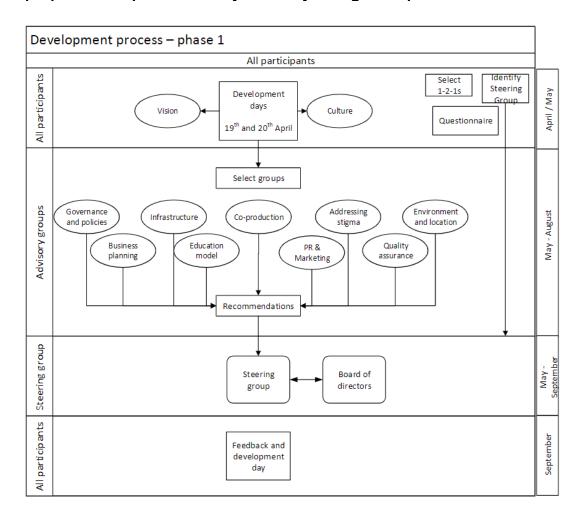
- Big Workshops kick off workshop, progress workshops/engagement events, wrap up workshop (work out themes, areas to explore, make final decisions);
- Smaller group work advisory groups/working groups (tasks-based, problem solving, coming up with solutions, recommendations, decision making);
- Steering group decision ratifiers.

Supporting methods:

- Questionnaire and surveys
- 1-2-1 meetings / interviews

Methods will depend on time and budget.

Example process map – form Jersey Recovery College set-up



Think about which of these methods you would use over the timeframe and with the budget you have. You can use supporting methods too.







Steering group

Phase / Dates	Method	Ongoing

Other considerations:

- Who will take part in which elements
- Balanced participation of stakeholders do the maths
- Session plans task / solution / decision focused
- Venue accessible, neutral, communicates value
- Refreshments
- Communications need to be constant and relevant to each group. Key engagement tool. Use flow chart to create a communications plan (add to workbook).



Event planning checklist

This is not an exhaustive list but gives some good check points.

Choose location	
Confirm date	
Confirm venue	
Confirm caterers	
Write facilitator's notes	
Photocopy resources	
Make PowerPoint	
Write tech spec and source	
Check tech spec with venue	
Get photo consent	
Make preliminary agenda	
Write delegate briefing	
Send out inclusion form	
Send out details to delegates	
Liaise with caterers	
Plan evaluation	
Print signs	
Create name badges	
Order taxis	
Write and send out press release	
Promote on social media / newsletter	
Get guest blogs	
Gather branded materials	
Confirm who will take photos	
Put PowerPoint on a stick	
Do workshop!	
Write up event	
Collate evaluations	
Edit photos	
Share on social media	
Reflect on workshop	
Pay for venue / caterers	
Evaluate workshop	



Workshop Plan

Time	Activity	Resources required	Who will do what	How will it be recorded	Notes

Some ideas:

Icebreaker
Introduction game
Lunch round up
Evaluation break
Break group work with individual reflection
Mix of learning styles



EVALUATING

Types of Evaluation

Evaluating as you go and getting regular feedback is an important part of the process. See *A Co-production Framework for Jersey's Mental Health Services* for 'What does successful co-production look like'. Don't be afraid to evaluate as the sessions happen so you can adapt and adjust as you go.

Qualitative and Quantitative are both valuable.

Some examples are:

- self-assessment
- stakeholder evaluation
- internal evaluation
- joint evaluation
- individual story telling
- causal-linkage and trend and change diagrams
- scoring
- brainstorming on program strengths and weaknesses

Workshop / project Reflection

Was this co-produced?	Did we do wha	at we said we would do?
What worked well	Even Ber	tter If
What can we dump?	What can we r	recycle?
Where are the gaps?	What can we	grow? What else can we do?
PHILISTHEGAP		*



Example of end of project feedback form from the Framework design

Which group/s were you part of during this project?
(Please circle)

Oversight Group Steering Group Coproduction participant (framework design)

Project team

How satisfied are you? (please circle)							
How much did this co- production experience meet your expectations?	Very much	Quite a lot	Somewhat	Not much	Not at all		
The communication in this project has been good. I have felt informed at every stage.	Very much	Quite a lot	Somewhat	Not much	Not at all		
The application process was straightforward (participants only).	Very much	Quite a lot	Somewhat	Not much	Not at all		
This experience has helped me feel that coproduction is an effective way of working together.	Very much	Quite a lot	Somewhat	Not much	Not at all		
How likely are you to recommend participating in co-production to friends, family or colleagues based on this experience? *	Very much	Quite a lot	Somewhat	Not much	Not at all		
How likely are you to participate in another piece of co-production with the Co-production Network?	Very much	Quite a lot	Somewhat	Not much	Not at all		



Impact on you (please circ	le)				
This co-production experience has helped me to feel connected to other people.	Very much	Quite a lot	Somewhat	Not much	Not at all
This co-production experience has helped me feel more hopeful for positive change in the mental health system.	Very much	Quite a lot	Somewhat	Not much	Not at all
This co-production experience has helped me feel more confident and given me more direction.	Very much	Quite a lot	Somewhat	Not much	Not at all
This project has increased my understanding of coproduction.	Very much	Quite a lot	Somewhat	Not much	Not at all
How well have we co-prod	duced? (Please	e circle)			
This project has been a positive experience for me.	Very much	Quite a lot	Somewhat	Not much	Not at all
The process took account of peoples' differing needs throughout.	Very much	Quite a lot	Somewhat	Not much	Not at all
Peoples' strengths were recognised, celebrated and utilised.	Very much	Quite a lot	Somewhat	Not much	Not at all
This project has felt coproduced.	Very much	Quite a lot	Somewhat	Not much	Not at all
This project has achieved what it set out to do.	Very much	Quite a lot	Somewhat	Not much	Not at all



SHARING

Sharing is twofold: to progress the work and to celebrate the work.

You already know people's preferred communication styles for your Inclusion sheet. You can evaluate your communication methods along the way to learn for future pieces of work.

Sharing work to move it forward

- Record feedback at workshops verbatim as much as possible
- Write up all workshop notes at the end of each session
- Issue regular feedback forms
- Interview participants at different stages

Sharing work to celebrate

- Take photographs throughout the workshops
- Create a project blog or website
- Evidence the narrative write creatively about the workshops and project
- Keep photographic or reflective journals
- Storyboard events
- Tweet about your workshops
- Speak at events about your projects
- Create a folder or scrapbook to store used tools
- Have a launch event for the work

FUTURE PLANNING

Tips for closing work

Measure success – Did you achieve what you set out to do?

Formal sign off – do you have to report back to anyone on outcomes?

Tie up loose ends – is anything left undone? Are your records up to date? Is there any unanswered questions? Is there any outstanding payments?

Learn your lessons – through the process you will have learned a lot – things will have went well, some things could've gone better. How will you take that learning forward onto future projects? Can you write it up as a case study to share with the Co-production Network.

Feedback – Have you communicated with everyone involved? Have they given feedback on the process and outcome?

De-brief – Have you allowed everyone in the project the opportunity to collectively de-brief? This is a very powerful tool.

Self-assessment – how do you feel after doing the work? You may want to get feedback from different stakeholders on your performance during



References

Risk assessment matrix and Risk Management tool Source: https://www.smartsheet.com/free-risk-management-plan-templates

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Event Planner source https://www.iriss.org.uk/resources/tools/co-production-project-planner

Workshop reflection source https://www.northcumbriahealthandcare.nhs.uk/making-it-happen/co-production/co-production-tool-kit/plan-on-a-page/

Useful for governance on participation https://www.england.nhs.uk/wp-content/uploads/2014/03/bs-guide-govern-part.pdf

Accessible meetings (learning difficulties, autistic, family and Carers) https://www.england.nhs.uk/learning-disabilities/about/get-involved/involving-people/making-meetings-accessible/#preparing

Bitesize guide for working with deafblind patients and Carers https://www.england.nhs.uk/wp-content/uploads/2016/07/bitesize-guide-improv-deaf-ppv-nhs.pdf
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Working with young people https://2u6szgq3e9x2hmfuy16guf8q-wpengine.netdna-ssl.com/wp-content/uploads/2016/09/NHS-Youth-Forum-Tip-Brochure-FINAL.pdf

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Inclusion checklist: https://www.iriss.org.uk/resources/tools/co-production-project-planner

Renumeration guidelines: https://emahsn.org.uk/images/resource-
hub/PPI%20documents/How%20to%20guidance/How to estimate the costs of public involvement.pdf

Event planning checklist and workshop plan: https://www.iriss.org.uk/resources/tools/co-production-project-planner