

# CO-PRODUCTION CHECKLIST

A checklist offering a broad  
range of prompts to support  
co-production in action

# I. PLANNING PHASE

## Who needs to be involved in co-production?

At the outset of your project, you need to have completed a stakeholder analysis to identify who may be impacted, and therefore who may need to be involved in co-production. Guidance on how to complete stakeholder mapping and analysis is available [here](#).

Drawing on your stakeholder analysis, you then need to select which cohorts are likely to be impacted by your project / initiative and, as a result, may need to be involved. This could include:

- Potential service users
- Current service users
- Families of service users
- Carers of service users
- Hampshire residents
- Adults' Health and Care staff
- Professionals from outside of Adults' Health and Care
- Providers
- Other organisations, e.g., Voluntary and Community Sector organisations

Before contacting individuals within your identified cohorts, you need to consider and plan the scope of your co-production initiative.

## What is the aim of the co-production project or initiative as you see it?

This may be further changed and shaped as a result of co-production, which should start as early as possible in the planning phase.

## Can the project realistically be co-produced within the project timeframe?

The time needed for projects will vary depending on the nature and scale of the project, but anything less than 6-12 months may not be enough. You may need to request more time or agree with the project sponsor that this initiative won't be a fully co-produced piece of work, but please don't let this put you off from involving people as much as you can in the timeframe you have available.

Can all aspects of the project be co-produced or just some? Where elements cannot be co-produced, what else could you do to engage? Are there any secondary sources of co-production that could inform your work – for example, information sources that have previously been co-produced?

## Are you likely to need specialist support to involve particular cohorts?

For example children or young people, or particular faith or ethnic communities.

## Has sufficient budget been identified?

For example to pay people's expenses and allowances, source venues or provide information in alternative formats, if needed.

## Are there any legal issues that may affect co-production?

For example pre-election period or formal consultation.

## Are there any potential conflicts of interest?

## Have you considered how you will ensure compliance with data protection legislation?

You may need to complete a Data Protection Impact Assessment.

## Is any of the project likely to be commissioned from an external organisation?

If so, you'll need to consider how you will comply with relevant procurement rules and procedures.

## 2. INVITING PARTICIPANTS

When you feel confident you have addressed the areas set out in section one, you can consider inviting people to take part in your co-production initiative. You may have links into existing cohorts for this purpose but if you are unsure, you can:

- **Discuss your ideas** with the Leads for established service user and carer representative forums – details are available [here](#).
- **Seek advice** by contacting the Adults' Health and Care Care Governance and Quality Assurance function.

When inviting people to participate, you need to be clear about the purpose and scope of their involvement. This may form part of a Privacy Notice, explaining how people's information will be used as part of seeking their agreement to take part.



## 3. MANAGING A CO-PRODUCTION MEETING



### STEP ONE: DECIDE IF THE MEETING SHOULD BE OFFERED IN-PERSON OR VIRTUALLY.

#### POINTS TO CONSIDER:

- What is the preferred method of the people you are engaging with?
- Will you reach more people online, in-person physically or through a mixed 'hybrid' approach?
- Do you have budget constraints?
- Will you engage more meaningfully with people in-person or online?
- Can everyone contribute equally online versus in-person?
- Are there any barriers to people participating online / in-person and are you able to mitigate them?

## STEP TWO: CONSIDER ACCESSIBILITY AND PRACTICAL MATTERS

Regardless of whether meetings are in-person physically, virtual or a mix, it is important to ensure everyone has access to relevant information and support to enable their participation as equal partners. Points to consider:

### Have I given people enough notice to be able to participate?

A minimum of four weeks is recommended but this also needs to be practical and built into project timelines.

### Do I know / have I asked people what they need before, during and after the meeting to support their participation and can these needs be met?

This could relate to their mobility and access, communication methods, ability to access materials, need for advocacy support or dietary requirements.

### What additional resources might be needed to help people understand and meaningfully contribute to the group?

E.g., cards that people raise when they do not understand or need the speaker to slow down.

### What information do I need to send participants in advance?

This may include anything relevant to the decisions being taken, the venue, technology, accessibility, hearing loops, etc. Some participants may benefit from a pre-briefing to maximise their input.

### Has information been produced in a format that is clear and accessible for all?

You may need to build in time and resource to provide alternative formats or it may be appropriate to consider providing advocacy support to enable participation.

### When does information need to be sent?

People need time to absorb and understand information to be able to participate meaningfully. Information should be provided at least a week in advance.

### Have you considered the needs of the individual attendees for breaks and time out?

This may be particularly relevant for longer or more complex meetings.

## ASPECTS TO CONSIDER FOR ONLINE MEETINGS:

- Do people have the right equipment to access the meeting?
- Do people need training or support to use the technology/apps to access the meeting?
- Is any support needed to help people access materials, before, during and after the meeting?
- Will people want to share materials virtually and is this possible?

## ASPECTS TO CONSIDER FOR IN-PERSON, PHYSICAL MEETINGS:

- What venue would be most appropriate?

### Have you considered:

- Distance from participants and travel times
- Familiarity with people and comfort
- Transport links
- Parking
- Accessibility (wheelchair access, lifts, loop system, lighting, toilets)
- Size of space(s) required
- Space for Personal Assistants / Carers
- Budget available
- Refreshments needed
- Adequate, accessible facilities onsite

## OTHER KEY CONSIDERATIONS

**Who will provide administrative support to the meeting, e.g., to capture minutes and actions?**

**In the event of an unresolved dispute or disagreement, is it clear who will be the ultimate decision maker, and has this been agreed by stakeholders?**

**Do you have the relevant skills to facilitate meetings, e.g., as a Co-Chair, or Hybrid session?**

You should think about how you will manage the expectations of the group; whether you have sufficient subject knowledge and/or understanding of the people involved.

How you would deal with conflict around the subject, or any known tensions within the group; and whether you can communicate in an inclusive way?

**Is the group covered by Terms of Reference and if not, do these need to be created, or ground rules established to guide meetings?**

**Is a risk assessment needed?**

**What resources are needed?**

This might include: stationary, audio/visual equipment, furniture.

**What forms and paperwork will be needed? What formats will you need, considering accessibility and language needs?**

**Resident Involvement Expenses and Allowances Policy** – check if participants have been informed about payment or any reimbursement available in line with this policy

**Claim forms**

Media consent forms – **HCC staff** and **Members of the public**

Your information leaflet

**Feedback forms**

Copies of agenda

Copies of any previous minutes

## STEP THREE: ON THE DAY – SETTING THE TONE

**Creating the right atmosphere on the day is central to supporting constructive and supportive co-production. Here's some top tips to set the right tone from the start.**

- **Be approachable:** don't be afraid to say how you feel or give people a bit of insight into you as a person. If this is the first of a series of meetings, it may worth devoting some time to some activities which encourage people to talk informally.
- **Establish the goal of the group and the specific session:** Ensure everyone present is involved in this and understands why they are there and what direction the project is going in.
- **Establish the values and purpose of co-production:** Everyone present needs to understand these values as they underpin the goals.
- **Establish shared definitions / meanings:** Don't assume everyone has the same understanding of a word or phrase (including co- production). Where possible, work out a shared definition as a group; where this cannot happen, be clear what definitions are being used. Once a definition has been agreed/ presented, have it available as a reminder and point of reference for people in each session.
- **Be open and honest about limitations of coproduction:** what influence people can actually have, what can't be changed, and why that is the case.
- **Check everyone understands what is going on:** not by asking 'do you understand', but by trying to get people to say what it is they have understood (this needs to be done sensitively so people don't feel patronised).
- **Create an atmosphere of equality:** show that you are personally invested in the project and if running the session with colleagues, spread yourselves around the room so you are not all grouped together.
- **Having contacted people in advance about what they need to access the session:** take a moment to make sure that these needs are met and people can participate fully.
- **Establish ground rules or agreements for the way people will conduct themselves and treat each other in the session:** Make sure everyone present is involved in this so they sign up to and own what is agreed. Agreements need to be directly linked to the principles of co-production (e.g. treating each other with respect, as equals, etc) and not just about practicalities (like switching off your phone).
- **Particular attention should be given to confidentiality:** it is good practice to have a clear statement on this issue which also covers the safeguarding responsibilities held by professionals.

## STEP FOUR: PROVIDING FEEDBACK, REFLECTING AND IMPROVING

Co-production should be a continual process of examining how we could do it better. Reflecting on co-production and seeking feedback to support ongoing improvement is key to achieving this.

**Thinking about your stakeholder analysis, how will you feedback to the different people involved or interested in this work throughout the process, taking account of their communication preferences?**

It is critical to keep people informed. Relationships you have built break down very quickly if people feel ignored. If notes or minutes are being taken, ensure these are circulated soon after the meeting. Make sure any actions arising from the session are understood and agreed by the group, and it is clear who the action is for. Follow up on feedback and actions as quickly as possible and keep people informed of what's happening.

**Invite participants' own reflections and feedback on the co-production process.**

Explain to people why feedback is important to helping you to learn and improve.

**What will you do with this feedback received?**

For example, where does it need to go? Who needs to see it? How will you learn from it? How will it be used to inform future practice? Where will it be stored?

Remember you need to ensure compliance with data protection and ethical research legislation and good practice. This may mean you need to complete a Data Protection Impact Assessment or produce a Privacy Notice.

People involved do want to know what the general feeling was, so share it with them.

**How will you reflect on the process and what you have done to support your own personal, and wider organisational, learning?**





Hampshire  
County Council



**LET'S GO WITH  
CO-PRODUCTION**  
IN HAMPSHIRE