

Measuring Success in Co-Production: Learning By Doing



Co-Production
Reflective Learning
Resource



Introduction

This resource accompanies the Report from [Measuring Success in Co-production: Learning by Doing \(2025\)](#). Please see the Measuring Success in Co-Production: Learning by Doing Report (2025) for detailed information about the programme, the way we worked, the information we collected and the evidence and rationale behind the approach for this resource.

Why Learning by Doing and Reflection is important...

From our collective experiences in the Measuring Success in Co-production programme, 'Learning by Doing' is the most effective way to develop capabilities in both co-production and [evaluation](#). Everyone came from different starting points. This practical 'hands-on' learning approach in co-production and evaluation was essential as different people, teams and organisations started or developed their journeys within both of these areas.

Throughout the programme some people commented that through considering how to measure success and the evaluation process, they were able to broaden their understanding of co-production and see it in a different way, i.e. to improve ways of working. This often helped the team move forward and ensure aims and expectations were being met. Evaluation was not just a method to capture impact and outcomes but a monitoring process to continually check against shared values, aims and expectations and to utilise in adapting the approach taken. In this regard reflective processes were seen as a key ingredient for enacting the principles of co-production.

- Our findings lend support to the fact that **a rigid framework is unlikely to be as helpful as adopting a 'reflective and adaptive' process** to enact the principles and goals of co-production which need to be tailored to the project, the people involved and the setting.
- In this **Reflective Learning Resource**, we are sharing some key learnings from factors and/or actions that teams identified relating to optimising the [conditions for co-production](#) by utilising evaluation. In addition, we have included open questions to support a flexible 'learning by doing' exploration of conditions required for setting up and following a successful journey with co-production. We hope these help you in considering and identifying what is most important for people and contexts to humanise the process and navigate the challenges in co-production.

What is the aim of this resource?

We asked a wide range of people what they would find helpful to come out of the Measuring Success programme. We were keen to avoid duplicating existing tools, but in responding to feedback we wanted to provide something inclusive, and of practical use, to help co-production journeys, regardless of stage, experience or expertise.

With the above in mind this resource provides templates to help you adapt and create a bespoke, co-production and evaluation approach specific to your context.

This is not a recipe for success, but we hope a starting point for conversations and planning that you can adapt, prioritise or change as you learn within your team/project.

Who is this resource for?

This Resource is for anyone who is interested or involved in co-production.

Why have we asked for your details to download this resource?

We want to understand how this resource is being used. We will record how many people have downloaded the resource and what contexts it has been used in. Co-Production Collective will include this aggregate information (anonymously) in their annual impact reports, published at the start of each year.

How you can help grow and improve co-production and work towards change...

- 1 Please cite this resource in your work as: Measuring Success in Co-production: Co-production Reflective Learning Resource (2025)
- 2 If you do use this resource we can also add your work to our Co-production Resource Library. Please get in touch to ask about this by emailing: coproduction@ucl.ac.uk
- 3 Provide feedback on the resource to help us track impact and identify the gaps we need to work more on by completing [this short survey!](#)

How to use this resource

There are **two parts** to this Resource:

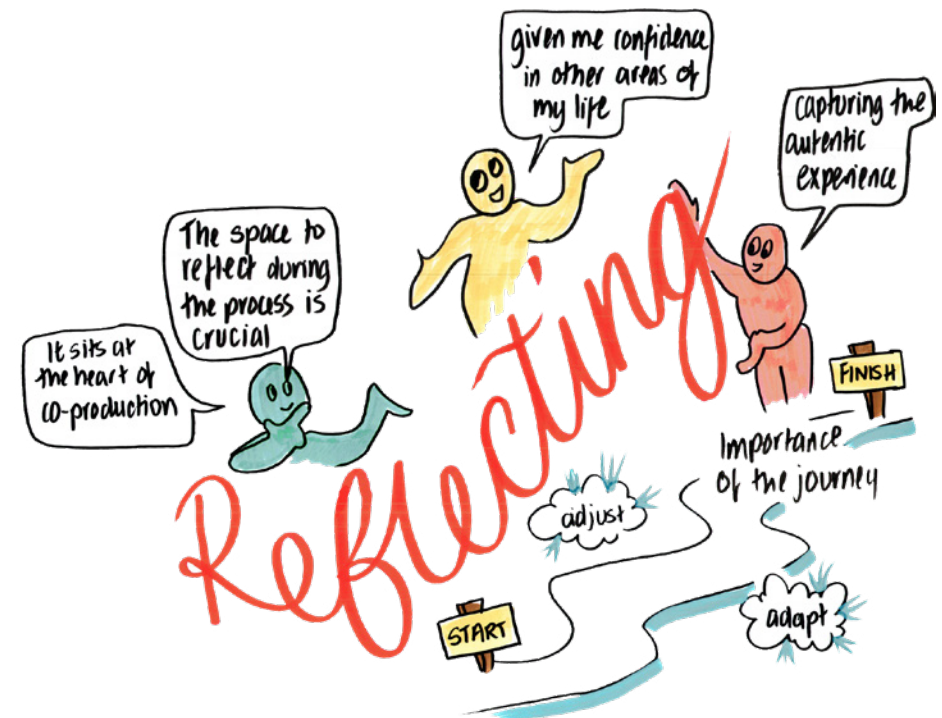
Part 1

These are the expanded versions of the conditions for co-production explained in Section 6 of the **Measuring Success in Co-Production: Learning by Doing Report (2025)**. Additional learning points are taken from the information provided by all project teams and questions that arose from these. These are listed in the tables presented in this resource (pages 7-26) to help you reflect, adapt and learn along the co-production journey.



Part 2

This is a starting point to develop an approach of your own. You can adapt these two templates to stimulate discussion and produce something that works for you and the conditions that you choose to prioritise.

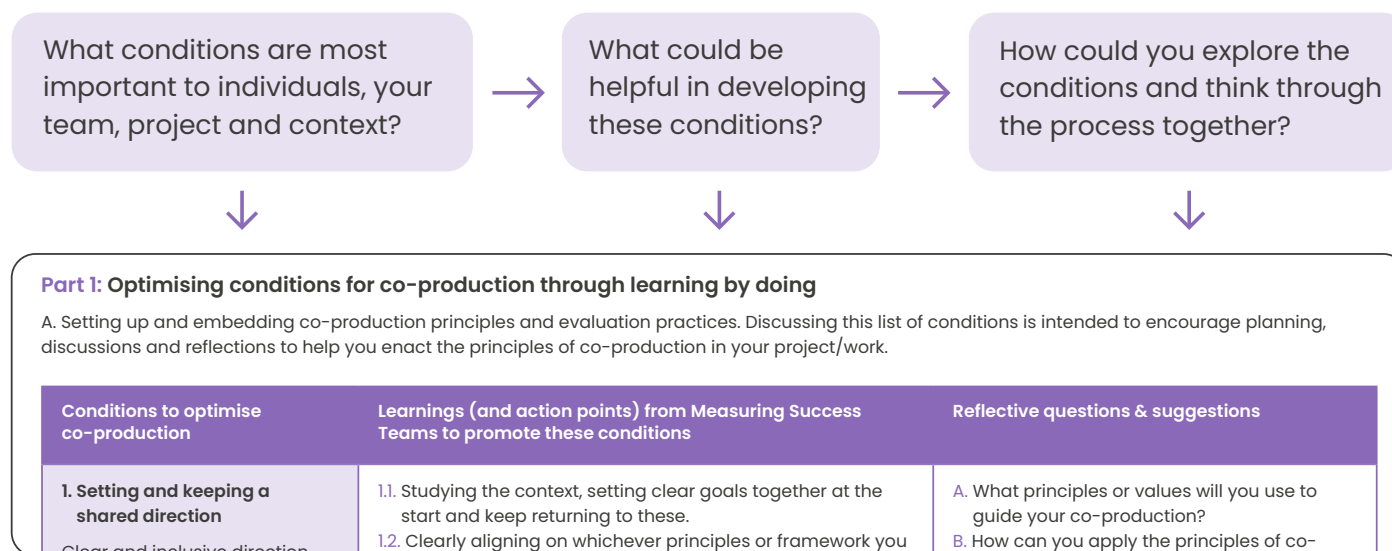


Images by Anna Geyer from New Possibilities

Using Part 1: Optimising conditions

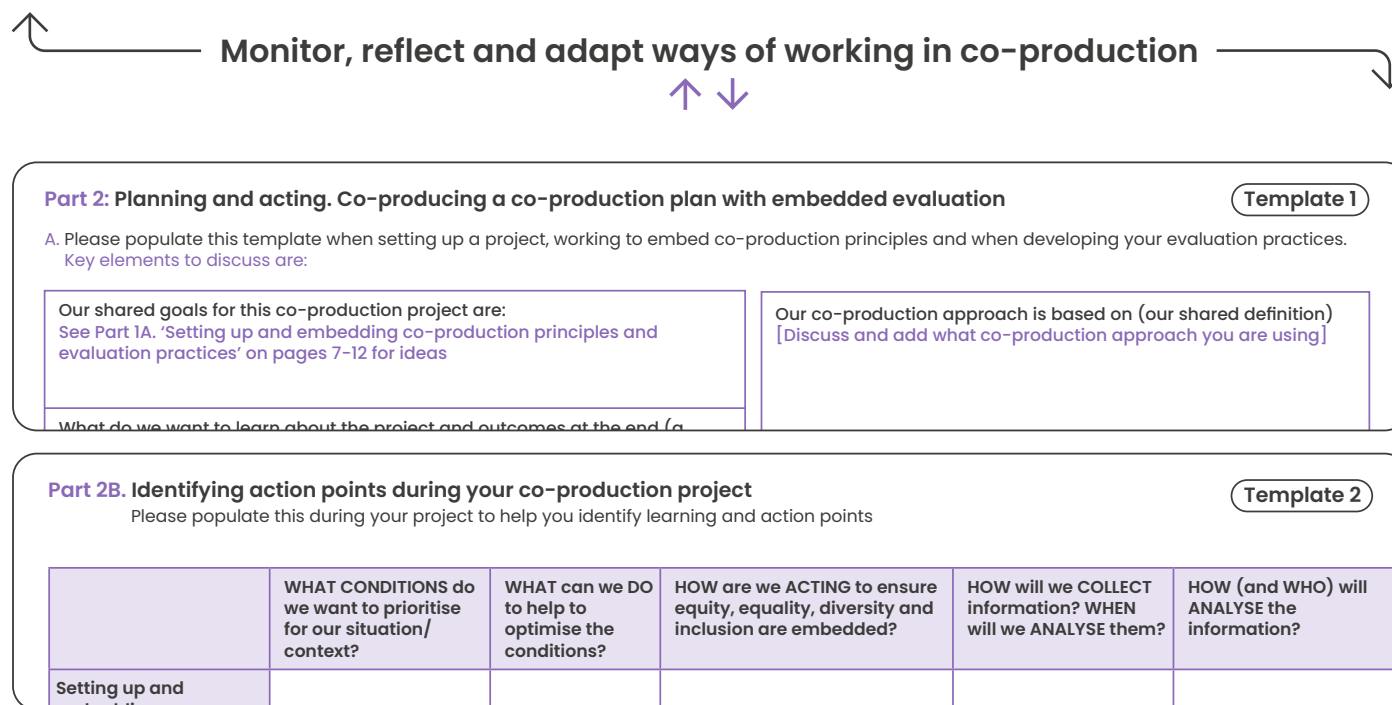
In this Resource, we share a matrix of 41 conditions for co-production, each with learning points from the Measuring Success Teams and accompanied by reflective questions or suggestions.

These are intended to encourage planning, discussions and reflections to help you enact the principles of co-production.



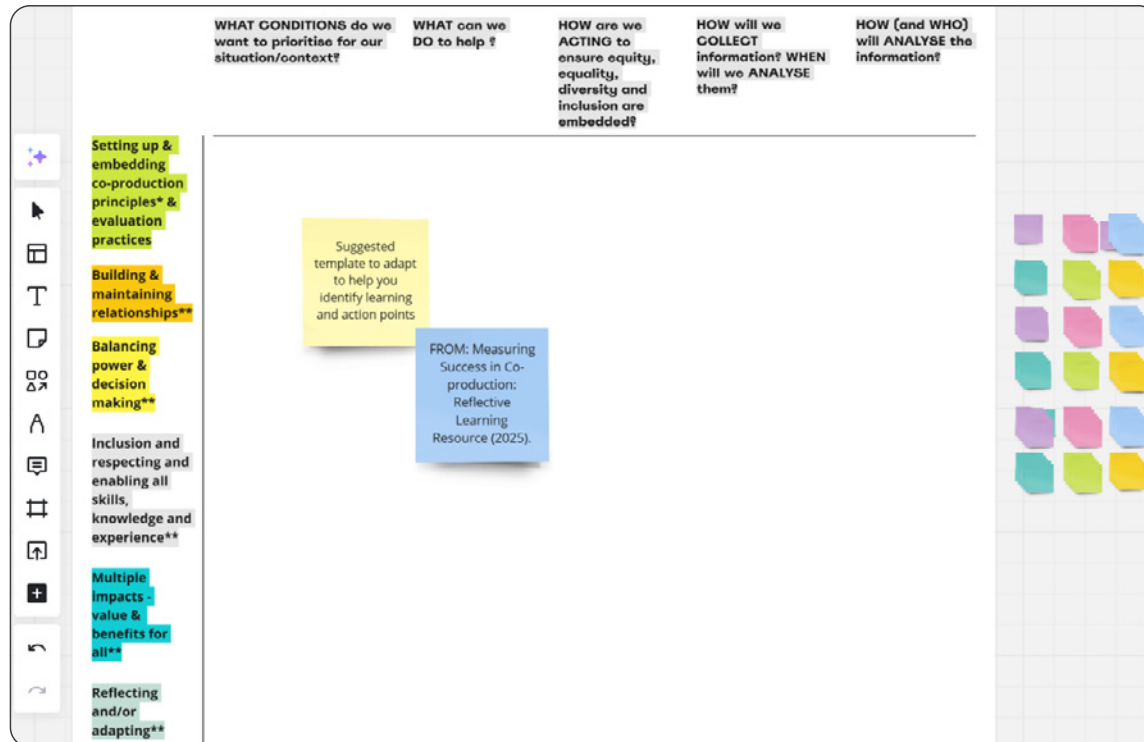
Using Part 2: Planning and acting

Adapt and populate these templates as you monitor, reflect and adapt your ways of working when co-producing; repeating the cycle regularly as you go along to optimise conditions.



Adapting the template and approach to different formats...

We have provided the templates as editable Microsoft Word templates and PDFs that can be adapted to a number of situations. The templates provided can be printed by individuals or printed to larger scale (A0, A1, A2) as worksheets for in-person meetings if used as provided here. This approach can also be adapted to use in online sessions, using digital tools such as Miro (online whiteboard) as shown in the example here.



Thinking about who to involve in planning your monitoring, evaluation and learning...

- When applying suggestions relating to Reflecting and Adapting conditions, a skilled facilitator to manage the conversations and introduce these ideas may be helpful.
- You may wish to consider additional activities with someone independent – not connected to your project or even organisation – to explore perspectives from different people, and feed these into the monitoring process at agreed timepoints.

Part I: Optimising conditions for co-production through learning by doing

Discussing this list of conditions is intended to encourage planning, discussions and reflections to help you enact the principles of co-production in your project/work.

A. Setting up and embedding co-production principles and evaluation practices.

Conditions to optimise co-production	Learnings (and action points) from Measuring Success Teams to promote these conditions	Reflective questions & suggestions
1. Setting and keeping a shared direction Clear and inclusive direction for group and project, relevant to context at outset. This can be gained through a shared clarity of purpose, goals and team values, and an agreed approach to co-production.	1.1. Studying the context, setting clear goals together at the start and keep returning to these. 1.2. Clearly aligning on whichever principles or framework you feel are most valid at the start of the project, and agreeing how all members interpret co-production. 1.3. Individuals may have different ideas about how to approach enacting the principles of co-production; it's important to develop a shared understanding. This includes ensuring that the language and concepts of co-production are accessible to everyone – principles can seem very abstract and need to be understood. 1.4. Consider context and mutual benefits when looking at how goals and principles can be enacted: these may be realistic and beneficial in one context (or even organisation) but not for another, or for people with lived experience. This may be more challenging for the whole team when more than one partnering organisation is involved. 1.5. Those new to co-production, or working in a different context, may need support to build capabilities in co-production. 1.6. Discuss whether there are likely to be any concerns or issues relating to copyright or intellectual property, and how this will be affected by co-production; ensuring all members can contribute to this discussion.	A. What principles or values will you use to guide your co-production? B. How can you apply the principles of co-production? C. Do you describe the principles in the same way? Where are the differences? D. How can you ensure the language and concepts of co-production are accessible to all? E. What do you need to do to reach a common understanding of a core set of principles that you could use as the foundation? F. What conditions for co-production do you think are important to you? G. How could you regroup as a team to reflect on whether you are continuing to work in line with your shared values and principles? H. How regularly do you meet to review the direction and goals? I. Are there any possible issues of copyright or intellectual property, and how can these be fairly addressed or resolved in the context of co-production?

2. EDI principles are prioritised Continuous questioning and planning to explore how principles of equality, diversity and inclusion will be enacted.	2.1. Seek to understand what, how and where lived experience and diversity is relevant to project and embed this within the guiding principles and approach. 2.2. Questioning and involving range of relevant experiences and backgrounds as part of the team, and identifying missing voices at all stages in the project. 2.3. Ensuring equitable processes are considered throughout the process to enable inclusion and diverse involvement.	A. How can you ensure that diverse perspectives, including from lived experience contributors are gathered? B. Which strategies might you implement to ensure that any missing voices can be identified and then amplified? C. How might you design your processes to ensure equitable inclusion and diverse involvement at every stage of your project?
3. Recruitment and role expectations Recruitment process and roles should be appropriate and sensitive for recruiting people with relevant lived experience	3.1. Managing expectations for people with lived experience in developing recruitment process. 3.2. Ensuring clear communication so that roles are understood, meaningful and realistic for the people involved in the project.	A. How are people with lived experience involved in designing your recruitment process? B. What is going to be important to communicate about the role to manage expectations (and uncertainty) for people joining?
4. Clear expectations, equitable support and opportunities Clear expectations around roles and responsibilities related to tasks, with equitable support and opportunities for growth where desired	4.1. Develop a mutual understanding of structure, roles and flexibility to accommodate different needs and motivations. 4.2. Allow room for roles to change for individuals as they build confidence to utilise existing expertise and/or new capabilities. 4.3. Feeling valued and purposeful whatever your role or level of input is important, acknowledging that people's needs and capacity/motivation can change over time. 4.4. Acknowledging and working on an approach to manage tensions between those who want clearly defined roles from the start versus those seeking flexibility.	A. How can you start to explore the different skills, strengths and experiences team members bring to the project? B. How can you think about tapping into 'hidden' or less visible strengths? C. Which skills and experiences are there that team members would like to develop as a result of being involved? D. How will you try and understand people's expectations about their roles, and for the project, from the start?

5. Prepared for people leaving – practical Plans in place for people leaving to address associated impacts on project, people, diversity and resource	5.1. Acknowledging and accepting that people may leave the project for various reasons. 5.2. Planning an approach for when people leave and deciding what to consider, including diversity of perspectives. 5.3. Openness and managing impact on others in team when people leave – considering emotional and resourcing implications.	A. How will you communicate with the team, and others, when someone leaves the project? B. How will you support each other, and what will you do to respond to the ‘gaps’ (resource, diversity, etc) when someone leaves. C. If someone leaves the team, how can you establish in a timely manner, whether a replacement team member can be recruited, or how their tasks will be re-allocated?
6. Trust: balancing openness and confidentiality Balancing trust and openness with confidentiality, privacy and safeguarding – maintaining ways of working and supporting difficult emotions and navigating tensions	6.1. Holding trust and confidence in other members relating to managing and maintaining confidentiality and safeguarding. 6.2. Respecting individual’s rights and privacy to leave a project without explanations. 6.3. Handling communications and supporting challenging emotions and concerns when other people leave or there are other disclosures on the project.	A. How can you develop a process and reminder in your ways of working that can be re-visited?
7. Managing uncertainty, emotions & tensions Collectively acknowledging uncertainty as a likely and potentially positive feature of co-production: openly discussing how to manage and ‘tolerate’ this	7.1. Maximum flexibility may mean managing difficult feelings around uncertainty. 7.2. Recognising that it may not be possible to fix all problems or issues. 7.3. Uncomfortable and uncertain moments can often lead to significant learning in co-production. 7.4. A project that changes course may result in better outcomes.	A. How will the group work together at the beginning to surface and anticipate tasks and processes that may feel ‘uncertain’ during the project (for different people)? B. What structure or processes could you develop and embed to help support uncertainty, both feelings and practical aspects?

8. Planning and timelines Planning realistic goals and timelines with the full team; allowing sufficient time and flexibility as things often take longer than expected and impact on people	8.1. Setting realistic objectives to reach project goals with some flexibility to account for change that occurs during the co-production process. 8.2. Not having too broad a focus and having realistic shared agreement about timelines. 8.3. Taking time to consider processes and protocols and whether these will work for everyone involved to achieve the outcomes required, desired or expected. 8.4. Allowing sufficient time. 8.5. Finding the right amount of connection and right pace for the individuals, the group and project.	A. How likely are you to meet your goals and objectives within the parameters that you are working? B. If you have changed course, have you been clear (with all team members and other stakeholders) about your new direction?
9. Accessibility and inclusion Open, practical and inclusive ways of communicating are set up and maintained	9.1. Discussing and setting up safe and accessible means of communication that people outside of organisations can access and use to participate fully. 9.2. Monitoring and exploring how well the current approaches are meeting everyone's needs regularly. 9.3. Prioritising different, safe approaches to support inclusive communication that facilitate and supports monitoring and evaluation.	A. How can you reflect on the communication approaches currently used? B. In what ways are they serving everyone's needs and can alternative ways of communicating and interacting be developed to enable full participation? What are team members preferences for communications?

10. Funding and managing budget Sufficient funding, transparent budgeting and regular reappraisal of resource allocation supports more equitable and optimal conditions for co-production	10.1. Funding can provide confidence and infrastructure to support flexibility, engagement and partnership development in co-production. 10.2. Having flexibility in funding conditions without too many restrictions allows focus on accessibility, creativity and inclusion in the journey rather than just outcomes. 10.3. Sufficient funding and resource enables more equal opportunities. 10.4. Regular reappraisal of budgets vs impacts. 10.5. Institutional financial requirements and overheads can make equitable and feasible budgeting in research co-production more challenging.	A. How can you explore any inequalities that you have in your budgeting as a group, and seek to resolve these?
11. Evaluation approach Clear alignment on core values and purpose of finding meaning and value in co-production to guide an appropriate, proportionate, accessible and sensitive approach to evaluation (See Planning evaluations in a context of uncertainty Evaluation theme/see chapter 7.1 in the report)	11.1. Understanding and defining together what evaluation means and how measurement should be approached. 11.2. Spending time considering the core values you have in common with respect to co-producing an evaluation. 11.3. Discovering what people understand when co-producing an evaluation, and what kind of approaches and metrics are accessible.	A. What do you want to learn and why? B. How could you collect the information in a way that is meaningful and respectful? C. Who will be involved at each stage? D. How do you make sure different perspectives are included at each stage? E. How do you want to be involved? F. Who is being asked these questions and who is missing? How can you make sure different perspectives are heard, incorporated and respected at each stage?

12. Monitoring of direction

Regular monitoring and responsive actions that maintain integrity of the process and expectations: resolving tensions early and restoring a clear direction

(See Reflecting and Adapting conditions and Evaluation theme/see chapter 6.2 in the report)

- 12.1. Holding in mind the purpose of co-production and the project aims throughout the project is important.
- 12.2. Checking that values are continuously and effectively modelled ensures integrity across the lifetime of the project.
- 12.3. Awareness that co-production is a dynamic process that is constantly evolving, shifting and changing. Using the guiding principles can help shine a light and resolve tensions early, in a compassionate way.
- 12.4. Taking a position of seeking to understand how agreed principles and values of co-production are being enacted and resolve tensions early.

- A. How could you regroup as a team to reflect on whether you are continuing to work in line with your shared values and principles?
- B. If you have defined ways of working, how can you assess how well you are working to these across the project lifespan?
- C. What ways of checking-in on how individuals (and the team) feel acceptable and comfortable?
- D. What will you do when tensions arise to resolve these early?
- E. How can you build in additional (and maybe impartial) support to help with this?

B. Applying Co-Production Collective's 'Principles of Co-Production'

Conditions to optimise co-production	Learnings (and action points) from Measuring Success Teams to promote these conditions	Reflective questions & suggestions
Building and maintaining relationships: What supports a relational approach?		
1. Investing time in connection and trust Sufficient time and different approaches to support connection and develop trust throughout the project	1.1. Prioritising and scheduling in time for relationship building outside of formal project meetings can be beneficial to support connection and develop trust. 1.2. Focussing on building relationships in the early stages of the project to enable group members to get to know each other is an important part of the process.	A. How can you create space and ways for people to develop relationships within the team? B. How might you co-create these approaches to think about different needs and requirements? C. Are there people who already know each other within a team alongside newer members? What impacts could this have? D. How can everyone work together to ensure newer members feel comfortable and able to speak-up?
2. Psychological safeness Psychological safeness in co-production spaces: responding with self-awareness, kindness and integrity	2.1. Create spaces that enable people to feel safe and comfortable with people (as well as capable in tasks); explore what this means for different people. 2.2. Check in kindly with ourselves about what is impacting our own lives and what perceptions of others we are bringing to the relationships, processes and the work. 2.3. Not making assumptions about other people's mental health or lived/living experience. 2.4. Understanding that each of us has a life in the background, and at times that will be challenging and affect relationships.	A. What kind of mechanisms are in place to support safeness in the co-production environment and within processes (including evaluation)? B. What does a trauma-informed approach mean to different individuals – how will you explore this in safe ways and how will you ensure this is enacted?

	2.5. Modelling values, kindness and focus on qualities of relationships. 2.6. Agreeing how to handle safeguarding issues.	
3. Compassionate environment – tensions and conflict Open and compassionate environment with resources and supportive opportunities to air tensions in relationships early	3.1. Exploring with each other how to create an open and compassionate environment. 3.2. Bringing the team back to the shared goals regularly can help resolve tensions and find common ground. 3.3. Having a strong focus on trust and developing supportive relationships with each other. 3.4. Putting in place ways of enabling members to identify, share and find ways to address tensions early can be helpful. 3.5. Transparency to prevent hidden power dynamics from maintaining relational tensions. 3.6. Discussing if and when external resource (e.g. facilitation of safe 1:1 or group reflection spaces) may be helpful to guide and support a process to resolve tensions. 3.7. Being compassionate to self and others when interpersonal clashes arise through opposing pressures or perspectives, ensuring all are supported equally to work through the difficulty. 3.8. Balance of informal and formal catch-ups helpful; sometimes the more impromptu chats around a work task can help a relationship move on.	A. What can you do to foster compassion and support within your ways of working and interactions? B. If challenges or conflicts occur, can people safely express how they feel (particularly when other team dynamics may appear unknown) and effect change? C. How will you monitor and respond early to support individuals/team when conflicts arise?
4. Different needs in connecting and relationships Human connection in co-production processes is supported	4.1. Understanding what and how different people need to connect with others and feel supported. 4.2. Promoting the human nature of relationships and including people to make authentic connections using the principles of co-production.	A. How will you work together to enable people to connect in ways that feel safe? B. What support is helpful to different people to develop connections that feel authentic and helpful?

5. Emotional support Appropriate emotional support is planned for, and available when needed	5.1. Recognising co-production as a relational process in which emotions are likely to surface. 5.2. Support and compassion for yourself/others when your lived experience is directly related to the topic. 5.3. Recognising and supporting impacts of personal conflicts between people, for individuals.	A. How will you identify emotional support needs in your group? B. Who do members feel comfortable sharing their emotional support needs with? How would they prefer to communicate this? C. How will you support these? What resource do you have available?
6. Feeling more widely connected to something through the journey Sense of being on a journey together heading towards a shared goal (rather than 'in' a project)	6.1. Focussing on collective wisdom – the qualities of thinking together rather than the content of the challenge or output. 6.2. Working collaboratively and learning from and alongside others	A. What is it about the journey that people are interested in experiencing?
7. Flexibility Open mindset and willingness to understand other perspectives	7.1. Anyone coming to co-production needs to have open mindedness and preparedness to be adaptable – having rigid ideas about how to achieve objectives is unlikely to align well with co-production values.	A. How can you support a discussion with all team members to notice the group's and individuals' approach to openness? B. What are the barriers or factors that might lead to a closed mindset? C. How can this be changed?

8. Accessibility and right conditions/settings to build relationships Settings are aligned with people's working, psychological and social preferences to build better relationships	8.1. Accessibility will mean different things to different individuals and may require a range of strategies to be inclusive and develop helpful relationships. 8.2. In-person meetings can enable some people to engage better and break down relational barriers compared with online interaction. 8.3. Some people may find online settings safer and more accessible where they can choose when and how to appear.	A. What will help you to make the way that you work more open, accessible and inclusive to meet different people's needs? B. How will you adjust the settings to meet all of your needs?
Balancing power and decision making: What does equitable decision-making look like?		
9. Leadership Shared approach to agree leadership approach: keeping things on track and 'finding' the right way to balance power	9.1. A coordinator or facilitator is required to keep things on track but needs clear agreement on responsibility and should not undermine the team's autonomy or decision making. 9.2. Human values-based, relational approach without hierarchy: levelling the playing field making working together feel more equal. 9.3. Agree an approach to distribute work and responsibility.	A. How do different members view and define the role of 'leadership in co-production'? B. How is collective leadership in co-production different to conventional leadership approaches? C. How can you share leadership within your team? D. What boundaries or barriers may prevent a collective leadership approach? How can these be managed? E. How can you promote, monitor and maintain consistency of the agreed leadership approach in line with the team's values? F. Would leadership training be beneficial to team members and if so, how might this be organised?

10. Choice in roles and decision making

Individuals are able to choose what and how much they wish to be involved in different roles, decision making, facilitating and/or leadership

- 10.1. Understanding of roles, time commitments and expected activities at the start of the project and/or each task is important for deciding whether and how to be involved.
- 10.2. Feeling supported and having a choice in the level and type of support desired to enable involvement.

- A. What is your approach to decision making in the group?
- B. What choices are available for people to be involved in different types of decisions?
- C. Have you considered if the range of methods you have employed are appropriate, relevant, and useable for the people involved?
- D. How can you ensure everyone is given equal choice (and the chance) to be included in decision making, while ensuring that the project can keep moving?
- E. How can your communication approach facilitate this?
- F. How can how you value people's time and resources to facilitate this?
- G. How will you manage conflict in decision making, should this arise?

11. Addressing uncertainty caused by power imbalance Finding an equilibrium of power in roles and responsibilities: balancing	11.1. Recognising and addressing unequal power dynamics can help reduce uncertainty regarding roles and responsibilities. 11.2. Critical to find a balance between introducing bureaucratic processes versus flexibility and trust in delegating decision making while ensuring all views are heard.	A. What are the potential power differences in your group? B. What factors may create these differences? C. How will you ensure that you are able to talk openly about these differences? D. How can you address these factors? E. How does power impact decision making and what can be done to change this? F. What can you do to ensure one view does not have more weight than another in decision making and that minority views are not discounted over majority views? G. How can you ensure people feel connected to the project as a whole, even if they are not or don't want to be involved in all decisions?
12. Noticing and balancing power of voice Regular check-ins, recognising and re-balancing power and addressing dominant voices	12.1. Building trust and supporting each other can lead to equity of voice or contribution.	A. How do the methods and tools used in your co-production approaches support equitable decision-making and power? B. How do you determine the share of voice different people have? C. What barriers – visible and invisible – exist that hinders this? D. What is in place to ensure that all voices can be heard equally?

13. Trust in decision making process Collective decision-making approach built on trust: acceptance of delegation where tasks have been shared	13.1. Accepting difference in priorities and finding an approach to agree what decisions can be made by individuals and smaller groups, and when wider input is needed. 13.2. Understanding that not everyone needs to be involved in every decision; trust and shared decision making can make best use of time, resource and ease pressures. 13.3. Consensus-driven processes may hinder progress; finding a way forward together and including all perspectives is important.	A. How will you delegate decisions to be made in smaller groups versus a larger group? B. What will you do to ensure diverse voices are included in decision making? C. How will you ensure that minority voices are not lost, if not part of a consensus? D. If you perceive a lack of trust within your team, are you committed to finding approaches to address this? How might you do this? E. How will you ensure that quieter voices are heard through equitable processes?
14. Time and money – control in decision making Time and financial resources acknowledged as powerful mediators in shaping decision-making, share of voice and motivation to engage	14.1. Time and financial resource can shift decisions by determining who is involved and by what process decisions are made. 14.2. Maintain transparency around budgeting allocations and decisions.	A. How will financial decision making be shared? B. During 'crunch points' how will you ensure everyone's voices are heard equally?

Inclusion and respecting and enabling all skills, knowledge and experiences: What will embed inclusivity?
(Two principles combined)

15. Compassionate facilitation Careful and compassionate facilitation that supports belonging, feeling heard and mattering	15.1. Establishing and developing the culture together is important. 15.2. Wellbeing check-ins can be helpful at the start of sessions to enable people to feel they belong in the group – that they matter. 15.3. Structure and routine of meetings can help some individuals. 15.4. The way conversations take place matters to people.	A. What qualities of leadership and facilitation helps people feel heard and included? B. What matters – is of value – to different people in the team? C. How do people want to be recognised? D. How equal do they feel their contributions are recognised?
16. Impact of identities and experience Understanding and empathetic towards challenges associated with overlapping identities (lived experience and other expertise): questioning how these may impact on self, others and project	16.1. Supporting people to consider and support navigating their own identity can be important to reduce tensions for individuals (and others). 16.2. Ensuring all perspectives and skills are valued equally.	A. To what extent do you support each other, reflect and behave compassionately towards each other when you come across challenges?
17. Inclusive & equitable practices Ethos of seeking to understand and develop inclusive practices and meet accessibility needs by all of team	17.1. Ensure different approaches are available for people with different needs, working styles, technological capability (and resources). 17.2. Offer flexible ways to be involved to help with time, availability and other responsibilities. 17.3. Consider a range of different formats for sharing, working on and presenting information.	A. How can you support the whole team to think about inclusive practices and accessibility to meet individual needs? B. What could help to ensure these are enacted by all team members throughout the team journey?

18. Valuing all types of lived and learned knowledge and skills Knowing that everyone feels their different skills, knowledge and experience are valued equally and perspectives communicated are actioned	18.1. Agreed approach to discover and draw on people's different contributions (knowledge, experience and expertise) and how to include and value all equally. 18.2. Need for transparency in decisions that may not be universally supported and opportunity to discuss feelings around this. 18.3. Allowing sufficient time for everyone to be equitably involved and feel valued. 18.4. Factors affecting feeling valued (or not) can be quite individual and change over time as the project and relationships evolve. 18.5. Trust fosters creativity and collaboration, creating an inclusive environment where everyone's contribution matters equally.	A. In what ways can you support an ongoing process of discovery within and between team members to understand different strengths, knowledge and experiences that could be harnessed with the project?
Multiple impacts: What are the value and benefits for all		
19. Range of impacts Acknowledging impacts work in multiple directions and levels: individual, group and project wide	19.1. Learning to notice and realise the nuance of impacts - concrete versus incidental - relating to outcome versus journey.	A. Think how you can develop a 'map' of the different levels, types and balance of impacts from and within your project. B. How have you ensured that all stakeholders been thought about in an inclusive way? C. What practical ways can you think of to consider and record these different types of impacts?

20. Financial reward/value Feeling valued equally with financial payments and processes: all valued in same way	20.1. Discussing what equality means to the group in the financial arrangements.	A. Who is involved in making decisions about how budgets are allocated? B. What does reward mean to different members in the group? C. What financial arrangements are appropriate/acceptable for people's circumstances? D. What else helps you to feel valued beyond financial rewards? E. What other benefits can the organisation offer that is of value to individuals?
21. Personal growth Supporting team members to 'do new things' that may enable personal growth	21.1. Individuals feel a sense of achievement in doing things they haven't done before such as being involved in a project through to completion. 21.2. Encouraging authenticity can counter limiting beliefs and lead to personal growth and for some, feelings of self-empowerment.	A. How can you capture and demonstrate the value to individuals?
22. Benefits for staff Tangible benefits for 'staff' as well as those with lived experience	22.1. Professionals are not excluded from having lived experience that can be relevant to co-production and including their experiences can be beneficial to other 'staff' involved.	A. How can you discuss impacts and sensitivities around lived experience of staff and external lived experience team members?

23. Emotional burden Identification, empathy and support for emotional impacts: addressing emotional burden and factors affecting feeling valued	23.1. Strategies to prevent people from feeling overwhelming weight of responsibility 'or pressures of 'representing a group'.	A. Who can members of the team go to for support? B. What type of support would be most helpful for individuals? C. What do you have the capacity (resource) to provide? D. What do you have the capabilities (expertise and/or experience) to safely provide?)
24. Latency of benefit for individuals Recognising that impacts on individuals may not be realised or noticed until much later on, perhaps at the end	24.1. Tangible, concrete impacts on a project can be relatively easier to understand and record, but more tangential or diffusive impacts can be missed or not recognised until later on. Later reflection and growth may occur.	A. What approaches can help individuals or your team to notice the impacts that are meaningful and aligned with individual and team goals?

Reflecting and adapting: What helps us to check our process is working for all?**25. Monitoring**

Continuous evaluation or monitoring is integral to learning and adapting co-producing

- 25.1. Viewing monitoring as a way of learning and improving co-production and making outcomes more relevant (diffusive rather than performative).
- 25.2. Continuous evaluation to feed learning into the process rather than an add-on at the end.

- A. How are you checking in together about the processes of co-production?
- B. What is working or not working to support continual improvement in co-production processes?
- C. How can you ensure that you recognise learning from doing and take actions or try a new approach?
- D. How can you make sure that you promote the things that are working for people?

Also see Setting up and embedding co-production principles and evaluation practices – condition A12

26. Safeness to support reflective practice

Creating safe spaces, dedicated time and supportive practices to address tensions and conflicts

- 26.1. Developing psychological safeness in a reflective space is key to allowing authentic discussions with all perspectives heard ensuring feelings can be safely expressed.
- 26.2. The flexibility to meet different needs can create safer spaces to elicit everyone's honest reflections and overcome challenges that will exist even within good working relationships.

- A. How can you facilitate a discussion to explore what a safe and authentic space 'looks' and feels like to different team members?
- B. How can these ideas be developed in practical and relational ways?
- C. How does this interact with other conditions: relationships and power?

27. Freedom and creativity from reflexivity Embracing freedom to reflect, be creative, adapt and be open to change of direction	27.1. Having an open mindset and being open to change: learn through feedback, accept mistakes, reflect and adjust. 27.2. Retaining curiosity and willingness to learn. 27.3. Organic development of an agreed way of working. 27.4. Freedom to access greater wisdom can shift creativity and focus towards the journey rather than just the outcome.	A. Are you/is the team curious and open to feedback, learning and change? B. How are reflective processes properly valued and supported through paid time and other resources? C. How are you able to adapt your ways of working on reflection? D. Are there any barriers to change of direction? How might you overcome these? E. How can you be creative about these barriers, and how they may affect the outcomes? F. If the team is feeling 'stuck', how can you collectively unpick and find ways to become 'unstuck'? Can an external person help with this process?
28. Creating different, appropriate opportunities to reflect Valuing and creating appropriate opportunities to listen and reflect on lived experiences and other's perspectives during the project	28.1. Different opportunities to reflect individually and together are important and can have different impacts. 28.2. Reflecting with lived experience can change direction for project. 28.3. Interesting to consider whether approach to reflecting (i.e. the content generated) changes over time with more opportunities, i.e. more honest or less honest in regards to how relationships are/are developed in a team. 28.4. External facilitation can support reflection sessions when sensitive in nature.	A. What are some of the different approaches to reflecting that could be used within the team? B. How can you ensure that these approaches feel inclusive and supportive to different team members? C. How have you enabled a balance of personal and group reflective processes?

29. Self-reflection

Self-reflection and self-kindness to acknowledge a need to step back from our own insecurities

- 29.1. Reflection at an individual level can lead to learning and growth, and balance 'voices' within a team.
- 29.2. Everyone taking responsibility to reflect and support learning can keep the team moving forward.

- A. What are you noticing that you are bringing to this project in terms of your perspectives, strengths and potential biases?
- B. What about this might it be useful to surface and discuss with others?
- C. What are you finding most difficult and can anyone help you with this?
- D. How are you seeking to understand, support and show acceptance towards perspectives different to your own?
- E. How are your own challenges affecting your involvement in this project, and who may help you?
- F. How are you responding to other people's individual challenges?
- G. How are you maintaining your integrity in this partnership? What can you do to be more compassionate towards yourself and others?

Part 2: Planning and acting. Co-producing a co-production plan with embedded evaluation**Template 1**

A. Please populate this template when setting up a project, working to embed co-production principles and when developing your evaluation practices.
Key elements to discuss are:

Our shared goals for this co-production project are: See Part 1A. 'Setting up and embedding co-production principles and evaluation practices' on pages 7-12 for ideas	Our co-production approach is based on (our shared definition) [Discuss and add what co-production approach you are using]
What do we want to learn about the project and outcomes at the end (a clear purpose)?	
What do we want to learn about the process during (monitoring) and at the end of (evaluation) the co-production journey?	Learning by Doing and Monitoring Impacts When (and how often) will you look at this plan? Who will look at it? [Some benefits will become clearer or take time to develop. See Part 1B 'Multiple Impacts - what is the value and benefits for all?' on pages 21-23 for ideas]
Value: what do we want/think the benefits (impacts) of the project will be and when? For individuals: See Part 1A. 'Setting up and embedding co-production principles and evaluation practices' on pages 7-12 for ideas For organisations: For wider impacts or society:	What do we think the benefits are now (insert time point here)? See Part 1B 'Reflecting and adapting - what helps us to check our process is working for all' on pages 24-26 for ideas How do you need to adjust? [Consider what is working/not working, what things do you need to keep doing, anything that needs to change]

Part 2B. Identifying action points during your co-production project

Template 2

Please populate this during your project to help you identify learning and action points

	WHAT CONDITIONS do we want to prioritise for our situation/ context?	WHAT can we DO to help to optimise the conditions?	HOW are we ACTING to ensure equity, equality, diversity and inclusion are embedded?	HOW will we COLLECT information? WHEN will we ANALYSE them?	HOW (and WHO) will ANALYSE the information?
Setting up and embedding co-production principles* and evaluation practices					
Building and maintaining relationships**					
Inclusion and respecting and enabling all skills, knowledge and experience					
Multiple impacts – value and benefit for all**					
Reflecting/adapting**					

*Using principles/approach you have agreed to with your co-production group
**Principles used by Co-production Collective (adapted from National Institute for Health and Care Research, 2024)

Feedback

In the spirit of Learning by Doing, we have created [a short survey](#) to capture any feedback you have on the Resource.

We welcome any comments on how you have used the resource, how different team members have found using it, what has worked well and any suggestions for improvement to feed into our ongoing evaluation and impact assessment (to be shared with our annual impact report).

Terminology and Glossary

What do we mean by ‘conditions’: we have discussed what we mean by ‘conditions’ throughout the programme. For this purpose, these could be circumstances that may influence how the principles or values of co-production are enacted (how we grow and develop our ways of working). Contributing to how these conditions develop, there seem to be a range of different factors. These could relate to the context or working environment, systems or interactions, for example.

What we mean by ‘evaluation’: our definition is a continuous process that helps you understand and measure the difference a co-produced programme, project or process makes. This process enables us to learn about what does, and doesn’t work, and share these findings to help change or improve something (it’s not about evaluating individuals or performance here).

Why use ‘measuring’: we felt this was a more collaborative and human way of thinking about the ways in which we can collect information (which sometimes can feel quite sensitive or personal) to capture learning about co-production processes that will enable us to change.

What we mean by ‘success’: the difference or the change that co-production enables in terms of impacts and value. It’s not about ‘not failing’ either!

By **impact** we mean – the effect or change that happens for the individuals involved, the project, or other groups of people, society, cultures etc.

By **value** we mean – how much usefulness, meaning or worth something is perceived to have.

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References

National Institute for Health and Care Research (2024) [Guidance on co-producing a research project](#) (accessed February 28, 2024).

