



# Co-production Toolkit Part two: Summary research report

North East and North Cumbria  
Integrated Care Board

July 2022

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# Background

Sunderland, on behalf of North East and North Cumbria Integrated Care Board, were looking to develop co-production training for staff and wider partner organisations across Sunderland. Co-production offers the opportunity for professionals and service users to work together to ensure that service delivery connects to lived experiences and is therefore meaningful and effective for all involved.

The main objective of this work was to develop a co-production training toolkit – a practical, easily understood, and accessible resource for staff to implement in the future. The research had the following key objectives:

- Preliminary research to understand staff thoughts about co-production, any barriers that may exist to its adoption and how they would like training to be delivered.
- Develop and deliver initial training that was cognisant of this understanding, worked to overcome any barriers and was delivered according to staff preferences.
- Evaluate this training with training participants to understand how it could be improved.
- Develop and evaluate the final toolkit. This is a stand-alone resource for co-production that can be iteratively developed by staff to reflect their learnings as co-production becomes embedded in routine practice.

To meet these objectives, the research was conducted in three phases:

1. **Phase 1: Initial training development.** Preliminary research was conducted with staff in the ICB and partner organisations to understand their views about co-production and how they would like training to be conducted. The outcome of this phase was the initial training delivered in phase two.
2. **Phase 2: Delivery and evaluation of training.** In this phase the initial training was delivered and then evaluated with participating staff.
3. **Phase 3: Development and evaluation of a co-production toolkit.** In this phase the toolkit was developed, following input from participants in all stages of the research.

The final co-production toolkit is presented as three documents:

1. **Summary information.** This document includes a range of background information around co-production, including a description of what co-production is, the use of language in co-production, a checklist of things to think about, some case-studies, and some further reading.
2. **Summary research report.** This document summarises the research findings from each phase of conversations with people and discusses how this led to the development of the toolkit. These conversations contributed to the summary information collected, and the training presentation.
3. **Training slides.** The aim of the training slides is to provide a gateway into co-production that emphasises the practical elements of this way of working with a focus on what co-production may mean for in the real world that people work in.

## Part two: Summary research report

The findings of each phase of the research and how this led to the development of the toolkit will now be discussed. Please note, this is not a standard research report. Rather, it is intended to act as a summary document that provides context to the development of the toolkit.

### Phase 1: initial training development

Within phase one, five interviews and two focus groups (with 10 participants) were conducted with staff to understand thoughts about co-production. The findings of these discussions were organised into three key themes: (1) Initial thoughts on co-production; (2) Barriers to co-production; and (3) Delivery of training. Each will now be discussed in detail.

#### Initial thoughts on co-production

All participants thought the concept of co-production was a positive idea, with most having previous experience of delivering co-production in some form, and referring the Path to Excellence work which they had been involved in. Co-production was thought to be an important tool for ensuring the opinions

and needs of service users were considered from the very beginning of any planning process.

*“I think that if we are going to co-produce the way we want to co-produce, everybody has to put the resident at the heart and create that kind of, ‘well this is the way we’ve always done things, and this is the culture, so you need to fit in with us.’ Well, no, we need to look at the resident and build from there.”*

*“We’ve been part of it from the beginning and we’ve made suggestions, as a working group, and those have been taken back and then developed and we’ve developed easy read versions for those harder to reach groups and worked out how we engage with those groups, when we deliver those paths to excellence pieces, for example.”*

## Barriers to co-production

Interviewees were asked to think about any potential barriers in delivering co-production. One of the key barriers identified across the interviews was the notion that ‘the expert knows best’. This was discussed from both sides; it was felt that some experts believe they are better placed to influence change and their expertise meant their input was more valuable than that of members of the public, and conversely members of the public might think their input wasn’t as valuable as that of professionals from the industry.

*“You know that, again, can be a barrier that not everybody feels like they’re on the same, sort of, level playing field and maybe not drawn to sort of value their contribution as much as they should. Because they think, well, they know better than me because they’re the experts.”*

*“I think the problem is that maybe the [organisation] has potentially been seen as the big player in the room and the one who almost always has to take the lead, so you tend to be in a bit of a parent and child situation when you’re working in partnership or has been in the past because it’s like well, the [organisation]’s in the room and therefore they must make all the decisions.”*

*“One of the rules that most agreed was this, it doesn’t matter who you’re working with, what their status is, what their level is in the organisation, nobody is better than anybody else... There are some*

*things that we need to keep within the parameter for being honest and open about what those are and setting that out at the beginning. And then making sure that you've got that kind of a good mix of representation around a table, so everybody feels confident and comfortable to contribute.”*

Another potential barrier to co-production was not having the appropriate time and resource to ensure it is delivered effectively.

*“Co-production is really effective when it works effectively but actually, sometimes, when you're caught up in those other strategic processes, that can be difficult to deliver, sometimes, from our end ... We need to have the resources to be able to deliver what we're being asked to deliver as well, to make it effective. Otherwise, if you start a co-production process but nobody's got any capacity, then you're not really co-producing with anybody.”*

*“I think there's something around having a specialist resource, someone with a bit more understanding and knowledge and there to advise and support you, if you want. If you're going down that journey, and you think, I'm not sure about this, who can help me with this? Who can I call?”*

Thinking more practically about engaging with members of the public to deliver co-production, it was seen as important that a variety of methods were used to ensure inclusivity.

*“I think we've got to kind of bear in mind that we do need to have a variety of methods, you know, not just kind of one. And we don't think face to face is going to solve it because some people don't actually like face to face. So, I think it's about sort of maybe saying, yes, and say face to face, obviously, would be the preference because I think you do get a lot more out of it. But at the same time acknowledging that we need to adapt, and we need to sort of be flexible in our approach. And depending on what the subject is, what the kind of target audiences that we're trying to, you know, to work with. And just sort of have that flexibility and remembering one size doesn't fit all.”*

*“You see if it's a focus group, for example, how you hold focus group. If you hold it in a particular place, could that be a particular barrier for some people? It's all of the kind of practical things and those things*

*that they may have to sort of currently consider. They might think, oh, well, you know, we'll set up a Teams because, well, that's great because everybody can join by Teams. But not everybody is competent to speak on a Teams call, usually body language, as well as on a Teams call."*

Participants also discussed the need to consider how to reach those members of the public who are less likely to engage. They recognised that these 'hard to reach' groups are potentially some of those who are most important to engage with.

*"I also think it's really interesting that because the [organisation] talk about this quite a lot, in that kind of patient forum and the patient voice but, your bog standard patient forum is probably an ex-nurse or health professional has chosen to become part of a patient forum because they're interested in that and I think that the understanding of the patient and the needs of residents is that it's sometimes, well it's easier to just talk to those who come forward to say that they'd like to participate but those aren't the ones with the issues. And, I'm currently having that kind of discussion within [organisation] at the moment as well because [organisation] is just as bad as others. You know, we'll kind of push out on Facebook or social media and think right, we've got a presence on social media within the area and that means that we know everyone is getting hit. Well actually, no, when you unpick that, it's predominantly women who are ages 35 to 45. We are not targeting any young people. We're not targeting any men. Whatsoever. So then, where's the dialogue coming in and where are you going into the community to have that conversation?"*

## Delivery of training

In terms of training on co-production, face to face was seen as the ideal method. However, it was recognised that other methods should also be offered, as many members of staff preferred to work from home where possible.

*"I think we're probably going to have to take a bit of a hybrid model to the training, as well. I think ideally, face to face, because I do think you get more... Me personally, my view is face to face so you can read body language. You know, you can bring people in more easily, and you know, you can have... Sometimes, you can have a bit of*



*discussion because you're not distracted by emails popping up on your screen, like I have all the time because I've got a constant stream of stuff popping up, and people trying to ring me, and things like that. When you're face to face, you're much more focused and you're much more in the moment, if you like. But I think acknowledging that we will still have some staff that potentially would want to do that.”*

It was suggested that to help co-production become embedded as the routine way of practice, an introduction to the concept should become part of mandatory staff training.

*“I think there's something about short and sharp overviews making it easy for people to kind of get, oh what's co-production. Whether it's, you know, a 10-minute, 15-minute part of staff training, do it virtually, whatever, but you're required, just like you have to do CPR or you have to do information governance. There's something that makes sure everybody understands what we mean first, because I think most people wouldn't.”*

The use of language was also seen as an important consideration, making it simple and easy to understand what is meant by the term co-production, both for staff members and members of the public.

*“It is around those languages. What does co-production actually mean for those hard-to-reach groups? If I said to my hard-to-reach group, we're going to co-produce, they'd be, okay, and what does that mean? Or we want to hear your voices. So, it is about that language, and I think, for a lot of people, that's great but what does that mean for them? What does that mean in terms of service change?”*

*“The language is really pertinent, as well. We know that the average reading age of our population, in Sunderland and South Tyneside, is nine to eleven years, so we've got a huge focus at the minute around... looking at all of our information, and recalculating that in a way that people can actually understand, which is a huge undertaking. Most of our staff are from our local population, as well. So, from a patient and staff perspective, most people live locally who work in the hospitals. We need to just make sure we're talking very simply. As you say, it's about talking and involving people who know the best about how things work, and how we should make things better for the future.”*



There was agreement that having a checklist of things to think about while implementing co-production would be valuable.

*“I think an operational point of view, from the operational teams, something like you’ve just explained in terms of a toolkit, and a ‘how to’ guide, would really be beneficial for people to embrace it, and not be scared of it. I think it’s making it practical, so that would be hugely helpful... if I was able to put something in that that gives me a more... ‘you need to consider at what point’... that would be helpful.”*

## Summary of phase one

In summary, co-production was seen as an integral part of any planning within the organisations participating in this research. It became clear that there was a need for the training to have a practical focus. There was also a need to include a checklist of points to be considered in any co-production within the toolkit. Participants understood that co-production needs to facilitate inter-agency working as well as engagement with members of the public.

## Phase 2: Delivery and evaluation of training

There were two distinct aspects to this phase. Firstly, the design and delivery of the training and then, secondly, the evaluation of it.

### Design and delivery of the co-production training

Training was developed and delivered to members of the ICB in Sunderland and partner organisations. To facilitate this training, invitations were sent by Sunderland to register attendance at two potential dates in April 2022. Overall, 12 participants took part in the two training sessions.

It is acknowledged that phase one of the research revealed a preference for face-to-face delivery of training. However, given increasing home working practices and the need to be aware of concerns around potential Covid-19 risks it was felt that offering the training virtually (through Microsoft Teams) was appropriate.

Cognisant of the need to offer training that had a practical focus, the training was designed to offer a gateway into co-production by explaining what it is not (i.e., a precise methodology) and, conversely, the core principles and features that unify this way of working. Periods of self-reflection were prompted throughout the training by asking participants to consider what they had learned, how it might apply to them and what barriers or facilitators might apply in their own practice. At the outset of training, it was made explicitly clear that discussion, observations and reflections were welcomed at all points from the group to help facilitate learning.

## Evaluation of the training

After training, all participants were asked whether they would take part in an informal interview to evaluate the training and thus improve it. Ultimately, two participants consented to take part in this evaluation.

In both interviews, the clear language used in the training was appreciated.

*“Co-production wasn’t something that I had heard of before I joined [work team] but it was just nice and refreshing to have it explained so clearly... it explained simply, for someone who doesn’t know about it, what co-production was and why you have co-production. I found it really helpful.”*

However, it was felt that the training could benefit from the use of case studies to bring the learning to life in a very ‘real world’ sense. In particular, one participant felt that the evidence of success provided within case studies could help justify the application of co-production approaches in their working environment.

*“For me, the thing that I learn best from is actually scenarios... Case studies would be really useful to help understand it and use it as factual evidence about where its been used and what the benefits of that have been.”*

It was suggested that a step-by-step ‘how to’ guide for co-production would be helpful, however it was explained that co-production is more a way of thinking than a set methodology. In this sense, the checklist that was referenced at the end of the training was found to be particularly useful.

## Summary of phase two

The emphasis on the practicalities of co-production and the use of clear language throughout was appreciated by the training participants. However, the evaluation of the training emphasised the need to consider the inclusion of case studies within the tool kit, both to aid in learning but also to secure buy-in for the adoption of co-production practices. Co-production checklists were also found to be a particularly useful tool.

## Phase 3: Development and evaluation of a co-production toolkit

Whilst phase three is presented as a distinct phase, it is important to acknowledge that building the toolkit was an iterative process that continued throughout the research. All participants were asked what they thought should be within the toolkit and whether they would agree with the suggestions of others. Any issues or concerns mentioned as part of the research were also used as opportunity to develop the toolkit as a source of information that could directly address any barriers to co-production. For example, in the first training session participants struggled with the use of the word 'power', feeling that it referred to a particular group having ownership over co-production. For this reason, the meaning of power (i.e., the issues that can emerge from conscious and unconscious social dynamics within co-production) is explicitly explained in the narrative underpinning the training slides that are included in the toolkit. Further, the need for a practical focus emphasised throughout by participants resulted in the inclusion of several case studies and a co-production checklist within the toolkit.

From the work conducted in phase one and two of this research, it was suggested that the toolkit contain the following documents:

1. This document, a summary of the research performed and how the toolkit has been developed.
2. A short summary of what co-production is and how it differs to other forms of engagement.
3. The training slides, along with an explanatory narrative.
4. A document referencing the co-production checklists that are publicly available and how they can be useful.

## 5. Case studies of successful co-production.

This suggested toolkit content was then discussed with the same participants that helped evaluate the training itself. The only addition suggested was a document explaining how important it was to use plain English in co-production practices to ensure that jargon did not cause any group to feel disempowered or inhibited.

*“You talked about everyone communicating in the same way which really helped but it’s a bit difficult for us when we are stuck in the middle of the two lots [of stakeholders] but I think to have words that mean the same things as examples. So, we might use ‘assurance’ but actually assurance is very much our world, what would we use so that everyone could commit to that word? Some examples like that might be really helpful.”*

## **The outcome of this research- a co-production toolkit.**

The final toolkit presented as the outcome of this research and has been presented in three parts. 1) supporting information. 2) Summary of research. 3) training slides.

Co-production is a large, nuanced and potentially complicated area of interest. Therefore, this toolkit should not be considered as an exhaustive resource. Rather it is intended to act to help people begin to navigate the complexities of co-production.

Finally, key to the success of this resource is that it should itself become the subject of co-production. It is hoped that the toolkit will be developed and refined by the people using it, so that it begins to reflect a continual and growing body of learning and expertise.



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