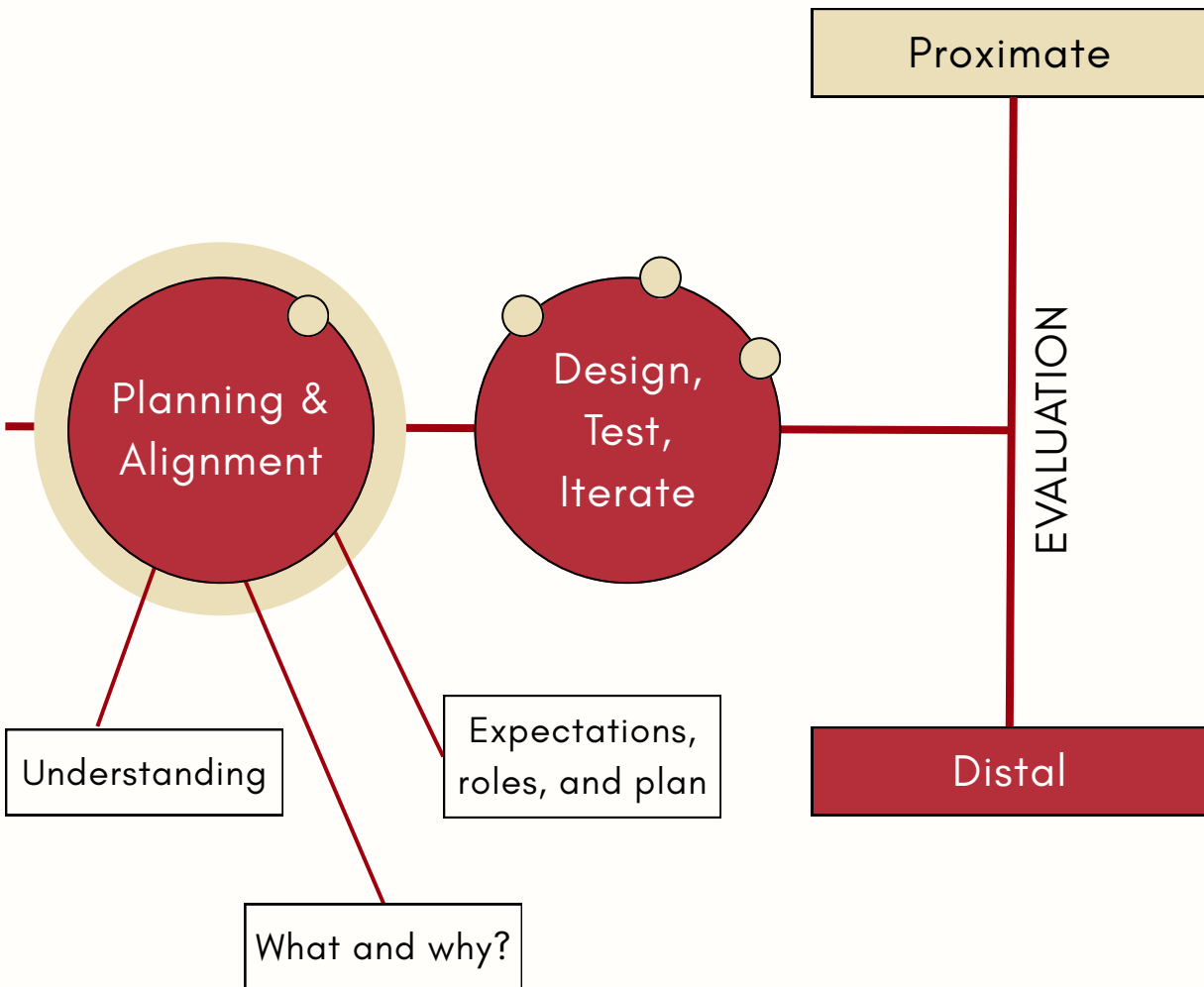


Step 2

A How-To Guide

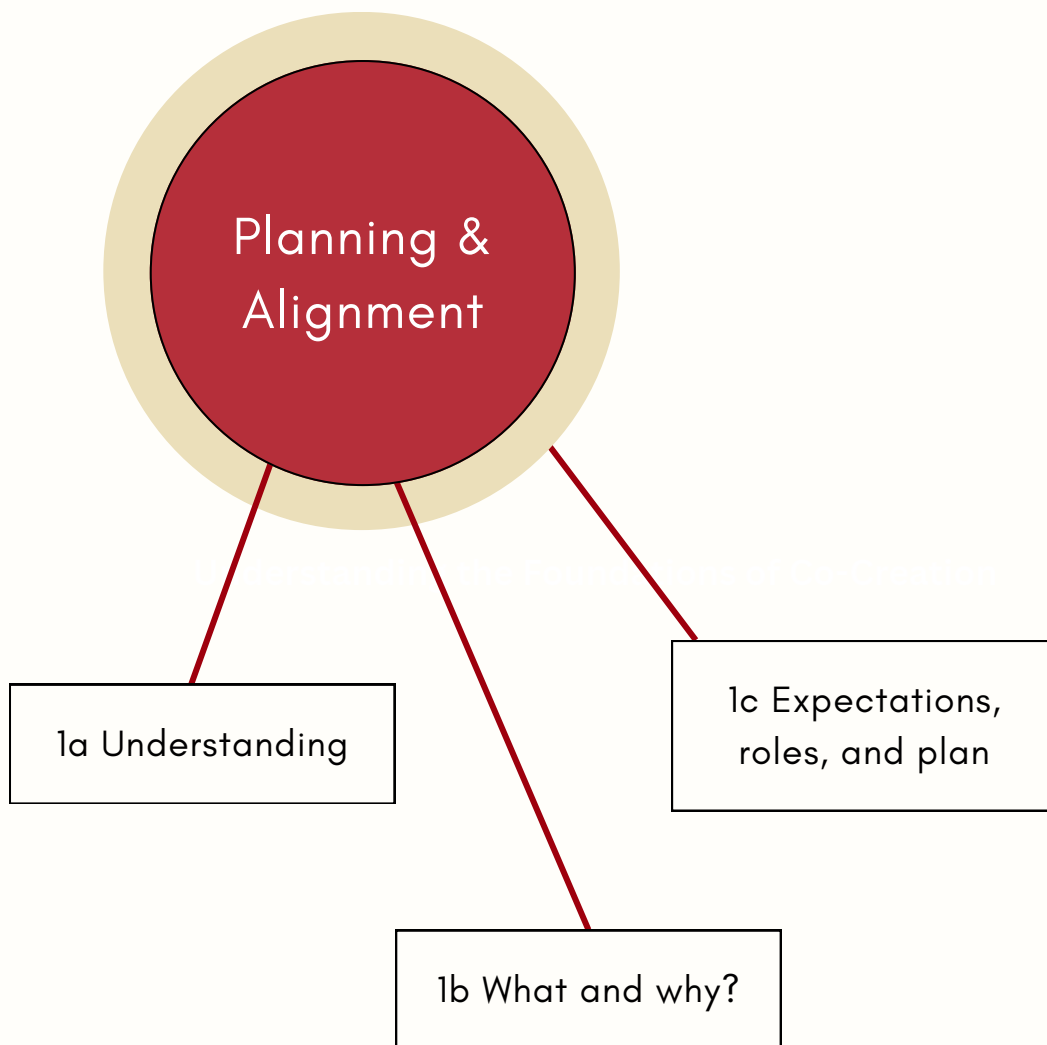
The Cycle	2
Phase 1: Planning and Alignment	3
Methods for Understanding Partners, Contexts, and Values	5
Rationales for Co-Creation	10
Methods for shared planning and decision making	15
Phase 2: Design, Test, Iterate	17
Methods for designing, testing, revising	19
Phase 3: Evaluation	21
Frameworks for evaluation	24
References	29

The Co-Creation Cycle



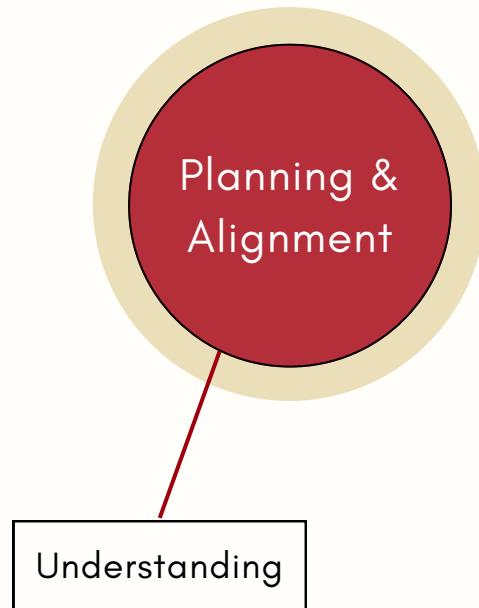
○: Check in points where all partners are involved. These can be workshops, meetings, or informal gatherings to share a meal and socialize.

Phase 1: Planning and Alignment



In the first phase of conducting sound co-creative research, the focus should be on understanding each other's values and goals, establishing a research contract, and a governance model.

1a. Understanding (Partners and Contexts)



Once the research collective is formed, get to know each other by utilizing one or more of the methods on the following page.

No research question, problem, or plan should be finalized until this step is complete. However, keep in mind that understanding takes time and will be ongoing as the research unfolds.

As discussed in Step 1, effective co-creation begins with respect, curiosity, and open-mindedness. Keep these in mind as you learn about each other's values, constraints, and lived realities.

Consultation with REB recommended ✓

Methods for 1a



Ethnographic Research [1]

Ethnographic research involves observing and listening to people in their everyday environments to understand their routines, values, and needs. It reveals insights that interviews or surveys might miss by focusing on real-life behavior.

Shadowing [2]

Shadowing means following a participant in their daily environment to observe how they act and what challenges they face. It captures authentic behaviors rather than relying on self-reports.

Institutional Ethnography [4]

Institutional ethnography studies how organizations and systems shape people's experiences by observing routines, interviewing staff, and analyzing structures. It uncovers hidden barriers or supports within institutions.

Context Mapping [5]

Context Mapping explores people's environments, routines, and values to understand the broader setting influencing their needs. It helps identify tacit knowledge that may not appear through direct questioning.

Day in the Life [6]

Participants document all their daily activities to reveal what matters most and where barriers or opportunities exist. It gives a detailed, realistic picture of daily routines that can guide design choices.

Customer Journey Mapping [7]

This method visually maps each step a person takes when using a service or product, identifying touchpoints, pain points, and improvement opportunities.

Personas [8]

Personas are fictional user profiles summarizing common goals, behaviours, and frustrations.

Deliberative Listening & Empathy Mapping [9]

Empathy mapping helps teams visualize what users think, feel, say, and do, revealing motivations, frustrations, and needs.

Actor Network Mapping [10]

This method maps all the people, groups, and organizations connected to a problem and shows how they interact.

Resources, page 6

Interviews [11]

Interviews are one-on-one conversations that explore people's experiences and perspectives in depth. They reveal motivations and insights that group methods may overlook.

Focus Groups [12]

Focus groups bring participants together to discuss shared experiences or opinions, revealing both consensus and disagreement. They generate rich dialogue and collective insight.

Storytelling Sessions [13]

Storytelling invites participants to share personal experiences related to an issue, helping to surface human perspectives and emotional insights for collaborative problem-solving.

Networking Events

Networking events are structured gatherings where actors meet, exchange ideas, and form relationships that can spark new collaborations.

Value Proposition Design [14]

This tool helps teams clarify what they offer, who benefits, and how value is created for users. It ensures the project's purpose aligns with user needs and expectations.

The Kipling Method [15]

These structured techniques help groups define and understand problems by asking key questions (5W1H), exploring root causes (5WHY), and reframing issues into opportunities ("How might we...").

Deliberative Dialogues [16]

Deliberative dialogues are structured discussions where participants weigh perspectives, share experiences, and work toward shared values or goals. They build trust and mutual understanding.

World Café [17][18]

Small-group conversations around key questions, with participants rotating tables to share ideas. It encourages inclusive dialogue and collective insight.

Feedback Surveys [19]

Surveys collect input from many actors quickly, identifying shared priorities, values, or concerns.

Reflective Workshops

These sessions invite participants to pause and reflect on their values, experiences, and learning. They strengthen alignment and shared understanding.

Knowledge Translation Workshops [20]

Workshops that share evidence or research in accessible ways, enabling partners to discuss relevance and apply findings to their context.

Six Thinking Hats [21]

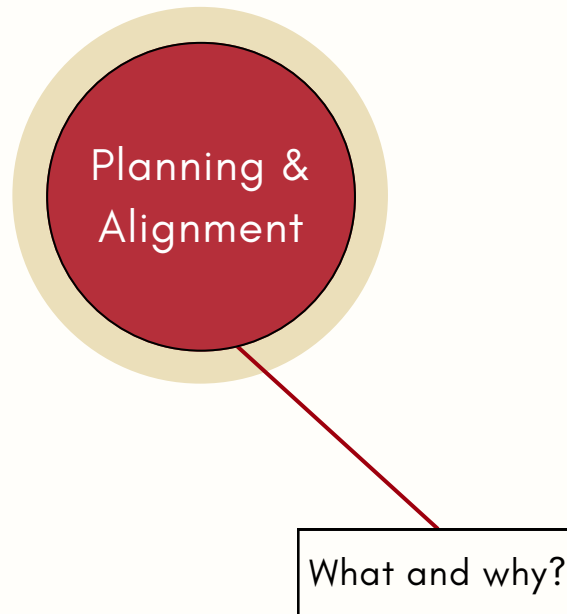
Participants examine a problem from six distinct perspectives (facts, emotions, creativity, risks, benefits, and process) to encourage balanced thinking and avoid bias.

Resources, page 13

Value Mapping

Value mapping helps partners reflect on why co-creation is expected to improve the project. Participants identify the different forms of value collaboration may generate (such as improved performance, stronger knowledge, or greater legitimacy) and discuss how these priorities differ across partners. This exercise helps clarify the project's shared rationale for co-creation and surfaces potential tensions early.

1b. What and why (co-creation)



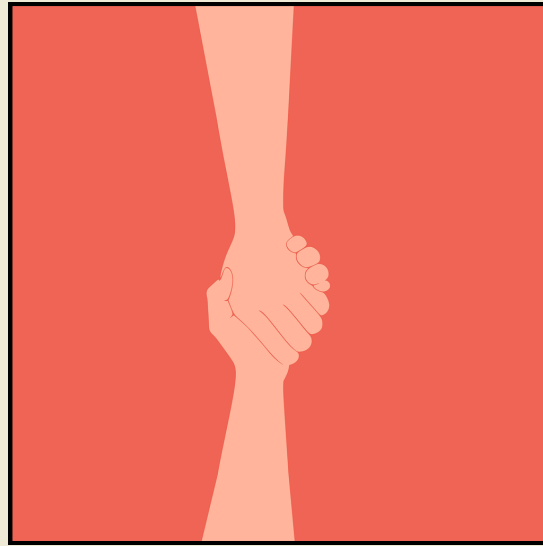
As a collective, identify the research problem and the research objectives.

Co-creation works best when everyone involved understands the rationale for using it. Rationales for using co-creation can be informed by historical case studies, empirical research, and/or theory.

Hypothesizing how co-creation acts as a mechanism for better knowledge production is important for evaluation and for informing future co-creators. There are innumerable theories and approaches that can be used to justify the use of co-creation. On the next page, we list some oft-cited ones.

Consultation with REB recommended ✓

Rationales for Co-Creation



Complexity Theory [22]

Think of society as a web of connected systems (like health, education, or the economy). Everything affects everything else.

Because systems are always changing, we need flexible, adaptive, and iterative ways of working, like co-creation, where people learn and adjust together instead of following a rigid plan.

Empowerment Theory [23]

This theory is about giving people more control over the things that affect their lives. It argues that everyone has the right to participate in decisions, especially those who are often left out. Co-creation fits this idea because it invites all partners to share power and shape outcomes.

Social Learning Theory [24]

People learn by observing and interacting with others. When co-creation brings people together to work on shared goals, learning spreads through conversation, modeling, and shared experiences.

Institutional Theory [25]

Organizations don't exist in isolation, they're shaped by cultural norms, rules, and expectations. Co-creation helps institutions adapt to new expectations about collaboration, transparency, and social responsibility.

Value Co-Creation Theory [26]

In business, this theory says value isn't just created by companies and then "given" to consumers. Instead, value emerges through interaction, when businesses, customers, and partners work together. Co-creation supports this by encouraging shared design and problem-solving.

Critical Realism [27]

This is a meta-theory, a way of thinking about how different research approaches fit together. It argues that to understand complex problems, we need both numbers (quantitative data) and stories (qualitative data). Co-creation aligns with this because it values multiple ways of knowing.

Capability Approach [28][29]

This theory says true well-being comes from having the freedom and opportunity to live the life you value. Co-creation increases these opportunities by involving people directly in shaping programs or policies.

Feminist Theory / Feminist Empowerment Perspectives [30][31]

These theories highlight how traditional systems often silence marginalized voices. Co-creation challenges that by centering lived experience and redistributing power in knowledge-making.

Normalisation Process Theory [32]

This theory looks at how new practices become part of everyday routines in organizations or systems. It justifies co-creation because it helps ensure that health innovations stick by involving the people who will use them.

Social Effectiveness Theory [33]

This theory focuses on building shared understanding and relationships. It supports co-creation because collaboration helps people agree on what matters and makes it easier for new health ideas to be accepted.

Research-Creation [34]

Research-creation is both a method and a theoretical orientation in which artistic practice is a mode of inquiry, not merely a mode of communicating research results. It treats making as thinking, recognizing creative processes, gestures, performances, installations, and material experimentation as legitimate forms of knowledge production. Research-creation resists the hierarchy between theory and practice, asserting that ideas emerge through doing, sensing, and creating, not only writing and analysis.

Postcolonial Theory [35][36]

Postcolonial theory examines how histories of empire, racialization, extraction, and cultural domination continue to shape present-day knowledge production from institutional arrangements to research practices. It challenges Eurocentric assumptions by centering voices and worldviews marginalized by colonial power.

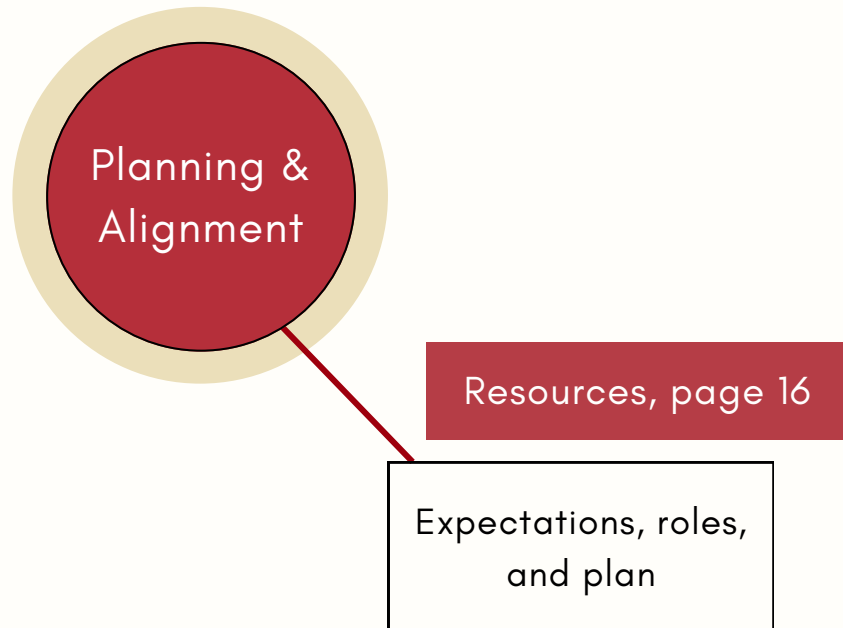
Actor Network Theory (ANT) [37]

This framework understands knowledge as a web of relations among humans, institutions, technologies, materials, documents and non-human actors, all of which shape outcomes. Rather than assuming knowledge is produced by individuals alone, ANT traces how networks are assembled, negotiated, and stabilized. It also traces how power circulates through interactions rather than resting in people or systems.

Bioethics [38]

Bioethics offers a framework for evaluating how research and innovation affect human well-being, autonomy, and justice, particularly in clinical or biomedical settings. Where co-creation is used, bioethics reminds us that collaboration must protect autonomy, minimize harm, share decision-making, and attend to systemic inequalities in risk and benefit.

1c. Expectations, Roles, and Plan



Once the what and the why has been noted, a written agreement should be made so that everyone agrees about their role, the research plan, the budget, and how unforeseen challenges will be handled.

Insights from 1a and 1b will inform the agreement.

For a list of methods that will help ensure this process runs smoothly and collaboration is equitable, see the next page.

Consultation with REB recommended ✓

Methods for Shared Decision Making



Nominal Group Technique [39][40]

A structured idea-generation process where everyone contributes individually, then the group ranks or votes on priorities. It ensures equal participation and fair consensus. Multivoting is a similar method, wherein participants vote across several rounds to narrow choices and prioritize the most supported options for the question, issue, or topic of brainstorming.

100-Dollar Method [41]

Participants “spend” 100 imaginary units on different options to express preferences. This creates a clear, quantitative view of group priorities.

Dotmocracy [42]

A visual voting method where participants place stickers (dots) on preferred ideas. It quickly reveals group preferences and areas of consensus.

Capacity-Building Workshops

Training sessions that build participants' knowledge and skills, enabling meaningful participation in research and decision-making.

Citizen Juries [43]

Randomly selected citizens deliberate on complex issues after hearing from experts, then produce recommendations. They bring democratic legitimacy to decisions.

Co-Authorship in Research [44]

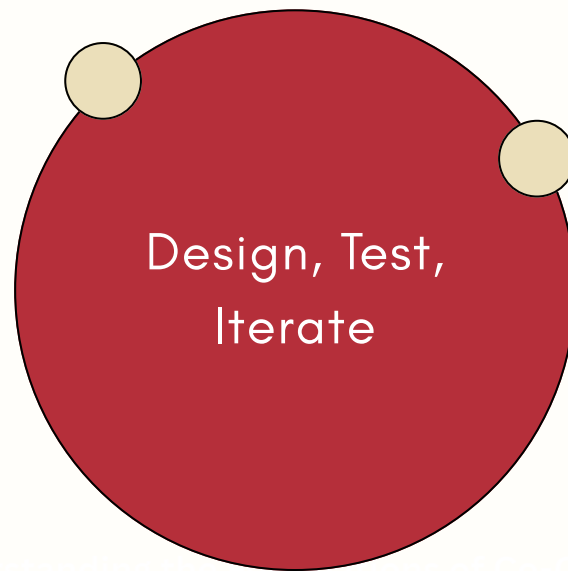
Partners write outputs together, sharing responsibility for findings and conclusions. It strengthens joint ownership of knowledge.

Listening Quality/Member Checking [45][46]

Participants review and verify collected data or interpretations to ensure accuracy and shared understanding. It reinforces trust and co-production of knowledge.

Resources, page 5

Phase 2: Design, Test, Iterate



Phase 2 is the stage most people imagine when they hear the term “co-creation”. It is where workshops, co-design sessions, prototyping, and collective problem-solving take place. Ideas are generated, tested, revised, and sometimes abandoned.

This phase only works well if Phase 1 has done its job. Without shared understanding, explicit value commitments, and agreed-upon roles and decision structures, Phase 2 can easily reproduce the asymmetries co-creation is meant to address.

Resources, page 17

Ethics review usually required ✓

The structure of Phase 2 will vary greatly from project to project. Some projects involve all partners throughout; others rely on smaller teams between collective check-ins (periodic reconvening of the full partnership to share progress and recalibrate).

What matters is not uniformity but transparency regarding how decisions are made, how feedback is incorporated, and how influence is distributed.



A defining feature of Phase 2 is regular “check-ins”. These moments allow partners to reflect not only on research outputs and progress, but on how the co-creation itself is functioning.

While check-ins are important for countering the McNamara fallacy discussed in Toolkit 1, they also provide an opportunity to start proximate evaluation. Consider distributing short surveys, or facilitating reflective exercises on how trust, openness, and curiosity are being fostered or hindered.

Methods for designing, testing, revising



Prototyping [47]

Prototyping means creating simple, low-cost models of an idea to test and refine it based on feedback. It allows learning through early experimentation.

Usability Testing [48]

Usability testing observes how real users interact with a prototype or product to identify what works and what causes frustration. It ensures designs are intuitive and effective.

Heuristic Evaluation [49]

Experts review a design against established usability principles to identify problems early. It's a fast way to improve user experience before large-scale testing.

Co-Creation Sprints [50][51]

Short, intensive sessions where diverse participants rapidly brainstorm, prototype, and test ideas. They generate tangible results quickly and promote collaboration.

Design Thinking Sessions [52]

Structured workshops that guide participants through empathy, ideation, prototyping, and testing. They combine creativity with user-centered problem solving.

Hackathons [53][54]

Time-limited, team-based events (often focused on technology) where participants build and present prototype solutions. They encourage innovation and rapid learning.

Living Labs [55][56][57]

Real-world testing environments where users and researchers collaboratively adapt and evaluate solutions in practice. They ensure interventions are effective in real contexts.

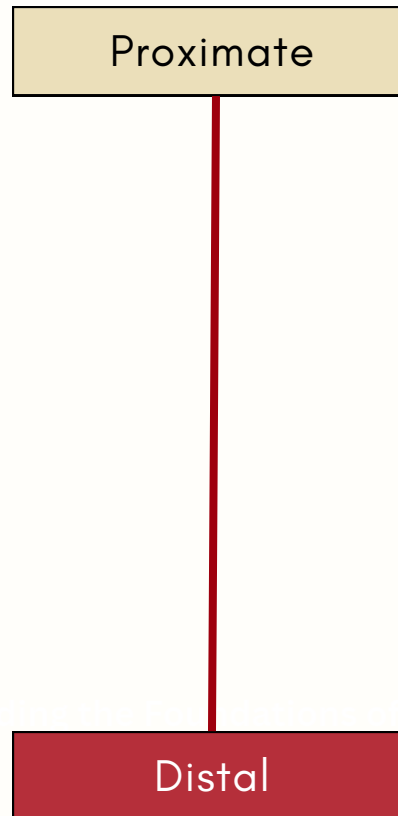
Business Model Co-Design [58][59][60]

Partners work together to design sustainable implementation models, including value creation and funding. It ensures solutions are practical and supported by all key actors.

Policy Co-Design Labs [61]

Collaborative sessions where partners prototype and test policy ideas iteratively. They make policy development more inclusive, legitimate, and adaptive.

Phase 3: Evaluation



In co-creation, evaluation is not only done at the end of a project. Rather, it is an ongoing, multi-layered inquiry into what worked, for whom, in what ways, and why.

We distinguish between three broad levels of evaluation: 1) Proximate, 2) Intermediate, and 3) Distal.

Proximate evaluation begins in Phase 2. It focuses on process, that is, participant's immediate experiences of the co-creation.

Ethics review usually required ✓

Typical questions might include:

Did participants feel heard, respected, and able to influence decisions?

Did co-creation contribute to ownership, empowerment, or alignment with stated values?

Were conflicts acknowledged and addressed constructively?

Did decision-making processes feel transparent and fair?

Intermediate Evaluation evaluates effects that emerge once a project is nearing completion. It considers whether ideas were implemented successfully and whether relationships or systems began to change as intended.

Typical questions might include:

Were the co-designed ideas implemented as intended? If not, why?

Did partners remain engaged beyond the initial design phase?

Are partners initiating new projects or actions based on this collaboration?

Did the mechanisms anticipated in the theory of change begin to operate as expected?

Were resources allocated to continue or scale the work?

Did internal policies, workflows, or decision processes begin to shift?

Distal evaluation examines longer-term and systemic effects.

These may include:

Uptake of findings in policy or practice

New skills, roles, or networks (capacity building)

Co-authorship or shared dissemination

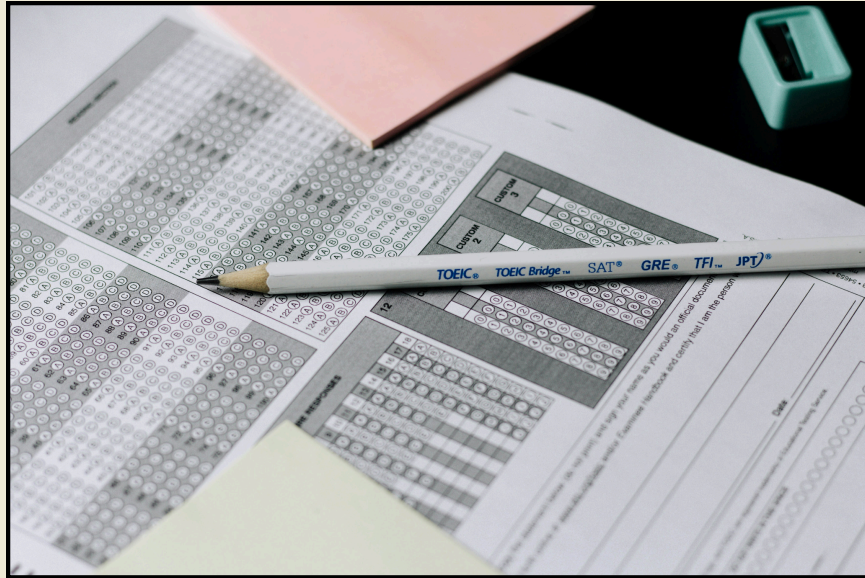
Scaling, replication, or institutional adoption

Changes to governance structures or organizational routines

Success in co-creation operates at multiple scales. A project might feel meaningful (proximate) but fail to influence policy (systemic). Another may achieve measurable uptake (systemic) but leave partners feeling excluded or exhausted (proximate).

Evaluation often includes considering how these layers relate.

Frameworks for Evaluation



Proximate Evaluation

Contribution Mapping [62]

Tracks how people, organizations, and technologies contribute to knowledge creation. It looks at relationships, shared learning, and “alignment efforts” between partners. For example, evaluators make maps and interview participants to trace how ideas and collaborations evolve.

SIAMPI (Social Impact Assessment through Productive Interactions) [63]

Measures “productive interactions” between researchers and others, such as meetings, partnerships, shared publications, or funding. The idea here is that social impact comes from these interactions, not just final outputs.

Flows of Knowledge [65]

Focuses on how knowledge and influence flow between researchers, funders, policymakers, and communities. Evaluators look at how relationships and awareness change, not just formal results.

Social Effectiveness [66]

Looks at whether an intervention helps people understand each other and build new social connections. It studies how relationships and shared meaning develop as part of the project

Intermediate Evaluation

Resources, page 19, 20

Formative Evaluation [67]

Provides ongoing feedback while a project is being implemented. Uses interviews, reflections, and creative tools (like “rivers” or “graffiti walls”) to help teams adapt in real time.

Normalisation Process Theory (NPT) [68]

Examines how new practices or interventions become part of everyday routines. It looks at sense-making (coherence), engagement (participation), doing the work (collective action), and reflection (monitoring).

PROSECO [69]

A co-creation-specific framework that evaluates five dimensions: delivery, participation, experience, context, and impact. It’s flexible, because users can mix and match components to suit their evaluation goals.

COM-B Model [70]

Used to understand and change behavior. It looks at whether people have the Capability, Opportunity, and Motivation to act, keys for sustaining co-created changes.

APEASE Criteria [71]

A decision tool for evaluating whether an intervention is Acceptable, Practical, Effective, Affordable, Safe, and Equitable, helping ensure that what's co-created is also realistic and fair. It is a subset of criteria derived from the behavior change wheel.

Distal Evaluation

ASIRPA [72]

Traces how research leads to socio-economic impacts through “chains of translation”, from labs to real-world change. Uses case studies, interviews, and evidence like patents or policy uptake.

S&T Human Capital [73]

This approach to evaluation typically focuses on the researchers – their skills, mobility, and networks. It treats knowledge as something embodied in people, not just in publications or technologies. This framework can be extended to all partners involved the co-created research.

Integrated Evaluation

These frameworks connect multiple levels of evaluation.

Realist Evaluation [75]

Asks, “What works, for whom, in what context, and why?” Instead of linear cause-and-effect, it examines how social mechanisms work differently in different settings, making it a good fit for complex co-creation.

Logic Models [76]

Simple visual tools linking project inputs → activities → outputs → outcomes. They help clarify shared goals and assumptions by using a diagrammatic model linking activities to objectives based on the underlying change, and with reference to the theory behind the change expected. Simply put, a logic model attempts to convey visually the logic of the program (connection between program activities and the program's desired outcomes).

MRC Process Evaluation [77]

A health research framework that integrates design, implementation, and outcomes. It balances structure with flexibility and emphasizes feedback, fidelity, and learning across project stages.

PARiHS [78] [79]

Focuses on the interaction between Evidence, Context, and Facilitation in implementing research. It values diverse forms of evidence (including local knowledge) and sees implementation as a dynamic, negotiated process.

Institute for Work & Health (IWH) Research Impact Model [80]:

This model offers a structured way to trace how research translates into real-world outcomes by moving through three stages of impact: immediate outputs (publications, briefs), intermediate outcomes: (research uptake in policy, workplace practices), and final outcomes (societal benefits – improved health and lower system costs). It acknowledges that impact becomes more difficult the further one moves from dissemination toward long-term societal change.

Next step

In step 3, you will find tools to help document shared understanding, clarify expectations, and evaluate progress.

These resources are designed to be used during workshops, meetings, and reflective sessions throughout the co-creation cycle.

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