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Partner & Context Mapping

Before defining the research problem or project plan, develop a shared understanding of the context surrounding the topic. The exercises below can help identify actors, institutions, technologies, environments, and policies that shape the topic, as well as areas of disagreement, uncertainty, or missing perspectives.

Mapping these relationships early helps partners understand how the issue is embedded within a broader network of influences and experiences.



Phase 1.a

Partner Mapping

1. Post the following discussion questions somewhere where everyone can see them. Add other questions if necessary or desired. Devote time for individual reflection.

How are you affected by this topic/problem?

Who typically participates in shaping this issue (directly/indirectly)?

Whose voice(s) are missing from the dialogue?

What technologies, tools, infrastructures, or materials do you think play a role in this topic?

What documents, standards, policies or other systems are involved?

What environments (physical spaces) and cultural forces shape the topic/problem?

2. After individual reflection, share answers as a group. Discuss.

3. Fill in the table together.

Partner	Role	Expertise	Interest	Constraint

Deliberative Listening Check

After identifying partners and their roles, participants should reflect on whether they have understood each other's perspectives.

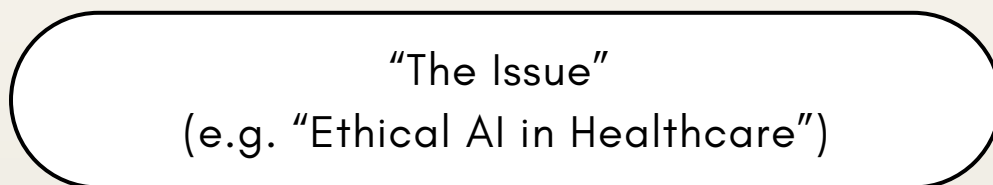
Deliberate listening involves actively engaging with others' views and being able to represent them fairly and accurately.

1. Partners pair up.
2. Partner A takes a turn writing the perspective of partner B on the issue.
3. Partner B has a chance to confirm or correct the interpretation.

Partner	My understanding of their perspective	Confirmed/Corrected

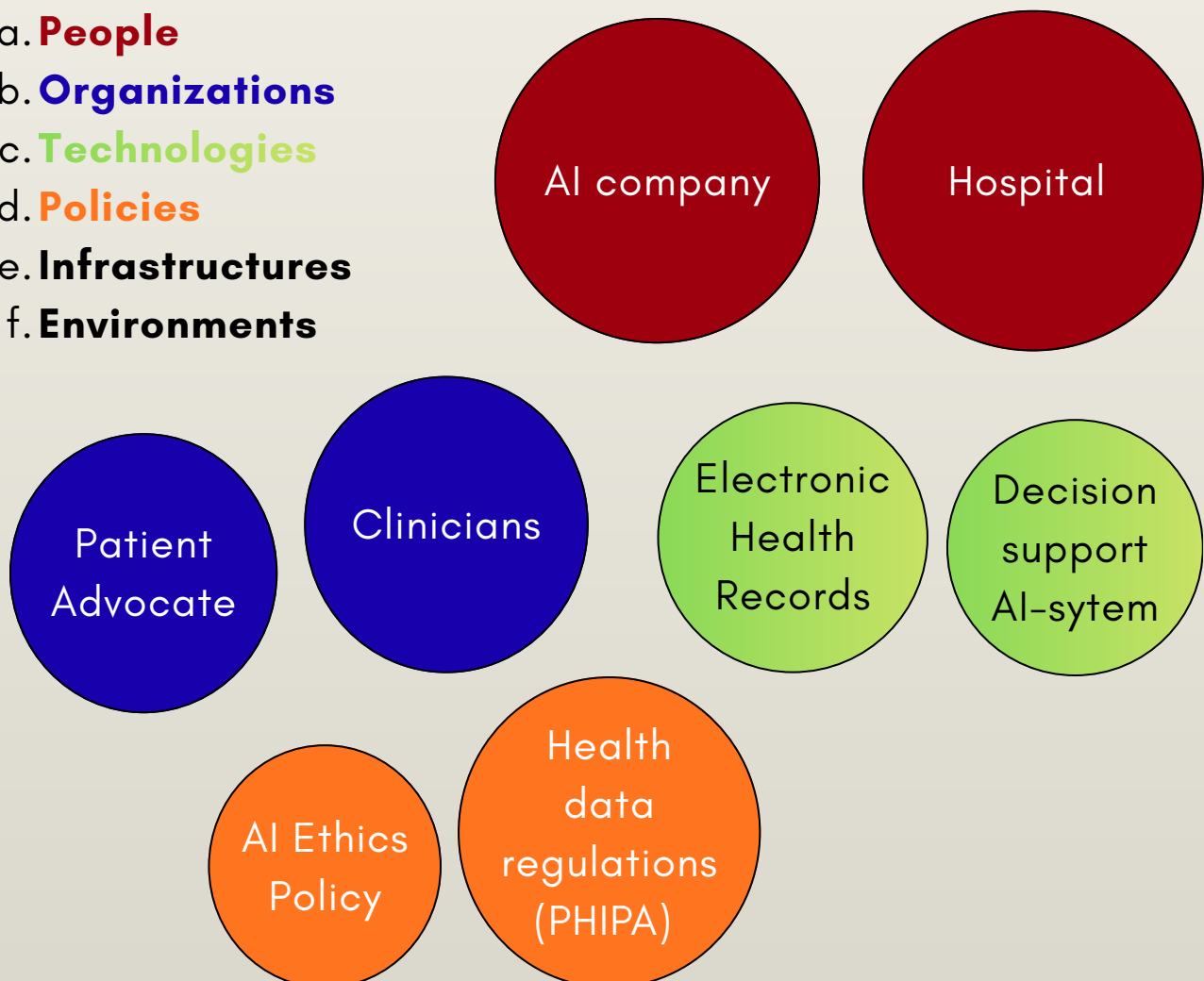
Actor-Network Mapping

1. Place the issue, project, ore research topic in the center.

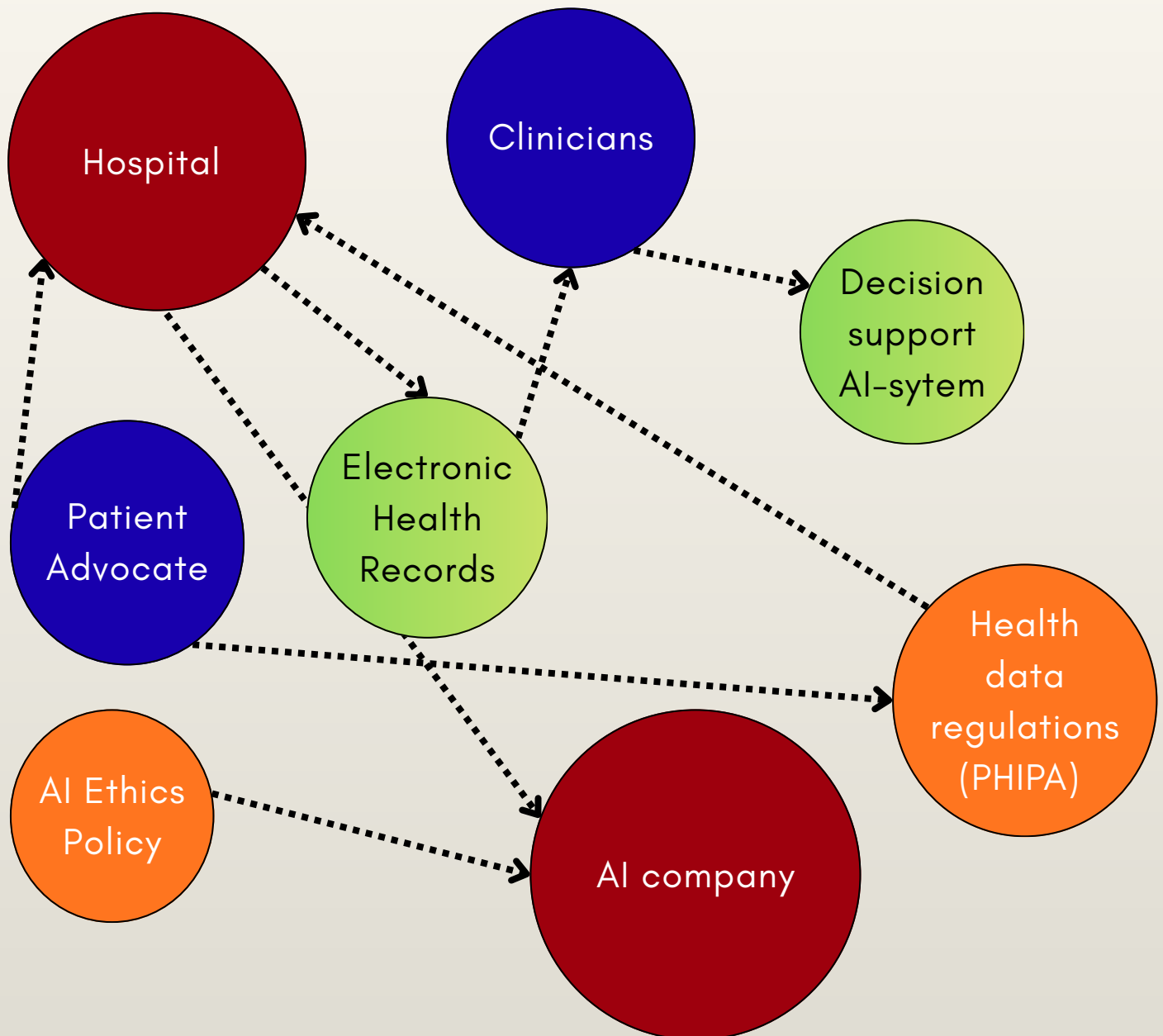


2. Identify all actors connected to the issue. Actors may include:

- a. **People**
- b. **Organizations**
- c. **Technologies**
- d. **Policies**
- e. **Infrastructures**
- f. **Environments**



3. Draw connections between actors that typically interact.



4. Annotate connections with what flows between them (information, funding, regulations, power, etc.)

Actors (Who appears central in your network?)	Relationships (Where do resources or information flow?)	Mediators (Which actors change how decisions are made?)	Controversies (Where do actors disagree about the issue?)	Missing Actors (Who or what should be added to the network?)

3. Fill in the table together. Group reflection.

Understanding Success

Before defining the research problem or project plan, develop a shared understanding of success/failure. Consider what success might look like from the perspective of the research outcome.



Phase 1.a

Success Mapping

1. Post the following discussion questions somewhere where everyone can see them. Add other questions if necessary or desired. Devote time for individual reflection.

What would make this project worthwhile for you?

What would failure look like?

What outcomes matter most?

How and when do we expect to observe outcomes?



Phase 1.a

Success Mapping

2. Fill in the table together. Group reflection.

Partner	Success Means....	Evidence of success	Anticipated timeline (short term, long term)?

Shared Definition of Success:

Value Surfacing & Co-Creation Hypothesis

Explore with partners why co-creation expected to improve the research. In other words, this exercise is meant to help partners articulate how participation is related to the definition of success identified above.



Phase 1.b

Value Mapping

1. Consider different “value logics” for using co-creation.

Economic/Performance Value

Will co-creation improve usability, uptake, or effectiveness?

Will it help reduce implementation failure?

Will it facilitate quicker and more efficient marketing research?

Epistemic Value

Will co-creation shed light on information that is sometimes overlooked or missed?

Will co-creation improve the credibility or relevance of the findings?

Will co-creation afford partners with more, or greater, knowledge-making capacities?

Ethical or Political Value

Will co-creation improve injustices, exclusions, or risks associated with the topic?

Will co-creation increase legitimacy or trust between partners?

Will co-creation redistribute or restore ownership, rights, or properties?

2. Map “value logics” by partner

Partner	Co-creation matters to me because....

3. As a group, discuss the following:

Do different actors prioritize different forms of value?

Consider how these values might reinforce each other.

Consider how these values might be in tension with each other.

If co-creation were removed from this project, what would be lost?

4. Embed Co-Creation in the Research Process

Stage of Research	All partners Involved? (Y/N, if N, which)	Role of each partner	Best method?
Problem definition	Y		workshops (n=3)
Study design	N (Only X and Z)		
Data interpretation	Y		
Implementation			
Evaluation			

Governance and Roles

Building on step 4 of the value mapping exercise, create a schedule that includes frequent check-ins, workshops, and social opportunities involving all partners.

Decide on roles, facilitation structure, and how individuals will be compensated for their labour.

What is the budget for the project?

How will all partners receive due credit for their involvement?

Who will facilitate each meeting?



Phase 1.c

Prototype Progress

As a collective and within smaller working groups, as the research evolves, make sure to note surprises, changes in understanding, successes, and failures.

Date	Prototype, policy, other output	What worked?	What failed?	Change needed

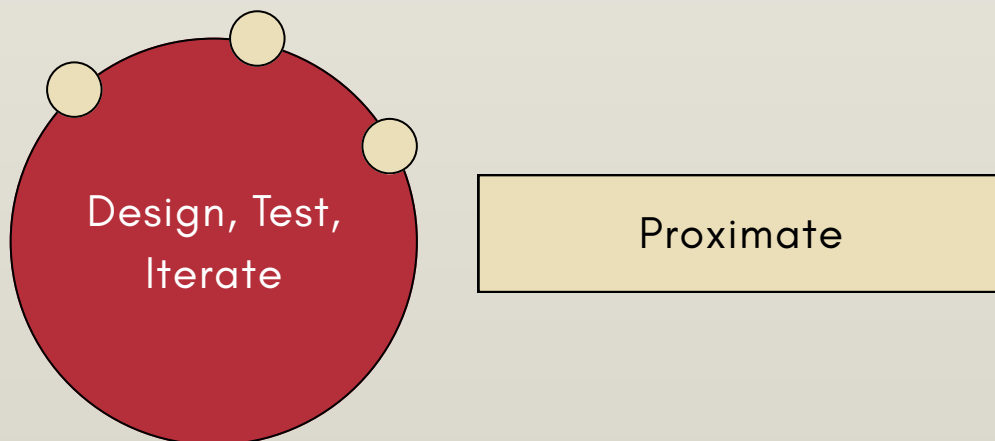


Design,
Test,
Iterate

Proximate Evaluation

As per the schedule, all partners should convene regularly to share honest feedback about how the co-creation process is unfolding. Doing this will help identify strengths, tensions, misunderstandings, or emerging concerns that might not surface in individual working groups.

Responses may be submitted anonymously.



Statement	1	2	3	4	5
I feel heard in this collaboration					
Decision-making feels transparent					
I feel that my expertise is valued					
I feel respected by all partners					
I feel a sense of ownership to the outputs of the research					
I feel comfortable sharing my perspectives, even when they differ from those of others					
I feel like the research is moving at the right pace					
I feel that I am learning through this process					

Do you feel the group shares a common understanding of the research goal?

What do you think could strengthen cross-context understanding?

Have your expectations for this project changed since it began?

What aspects of the collaboration have worked particularly well?

What should we continue doing? What should we change?

Distal Evaluation

Early in the co-creation process, you will have identified indicators of success that extend beyond the co-creation process. These longer-term outcomes may include changes in policy or practice, new collaborations, shifts in institutional routines, or broader public engagement with the research.

As the project unfolds, these impacts may begin to emerge in partial or indirect ways. Use the tool on the next page to keep track of these outcomes.

EVALUATION

Distal

Impact	Evidence	Projected Timeframe	Actual Timeframe
Policy Change	<i>e.g. Research findings cited in government consultation report</i>	2-4 years	
Educational impacts	<i>e.g. Research integrated into training programs</i>	2-5 years	
Publications	<i>e.g. Peer-reviewed article or co-authored report published</i>	1-3 years	
Adoption of technology	<i>e.g. Prototype tested in real-world setting and integrated into delivery</i>	4-5 years	
Capacity building	<i>e.g. Community organization launches program based on research insights</i>	3-5 years	
New funding streams	<i>e.g. Follow up grant awarded to scale the project</i>	1-3 years	