



# how are we going?

checking in throughout research  
co-design and co-delivery

# Checking in

## why we made this

While frameworks exist to evaluate what's been co-designed (for example, using RE-AIM [1]), there's less guidance on checking in throughout co-design and co-delivery.

Knowing how the team are experiencing the co-design process helps to improve current and future research activities. Especially if you share what you learn with others.

Checking in can reduce conflict and keep people involved through conflict.

## what's in this resource

This resource helps research teams to check in about how co-design or co-delivery is going. Or, how it went.

We give guidance on:

- what to ask
- what you might hope to hear
- when to ask
- what to do with what you hear

On pages 5–6, we give examples of **what you might hope to hear** if things are going well and you're following the [key principles](#) [2].

The questions build on existing resources [page 9] and from conversations with consumers, carers and researchers.

The document isn't about evaluating healthcare or research translation.

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## what to ask

Ask these questions at the beginning of the co-design process, at each milestone or at the end.

You could ask these questions in one-to-one conversations, in anonymous surveys or polls, in team meetings or in another way that suits the people you're working with.

**Tip:** Not everyone is comfortable speaking up in a group, especially if something isn't going well. Have one-to-one conversations.

### what

### why ask the questions

What's helping us work together? /  
What helped us work together?

Helps identify enablers

What's getting in the way? /  
What got in the way?

Helps identify barriers to participation

What am I getting out of the work? /  
What did I get from the work?

Helps to identify progress on capability building, skills and confidence

How do I feel in the team? /  
How did I feel in the team?

Helps understand experience

What should we change? /  
What will we do differently next time?

Helps change practice

Who isn't involved? /  
Who wasn't involved?

Helps identify gaps and exclusion

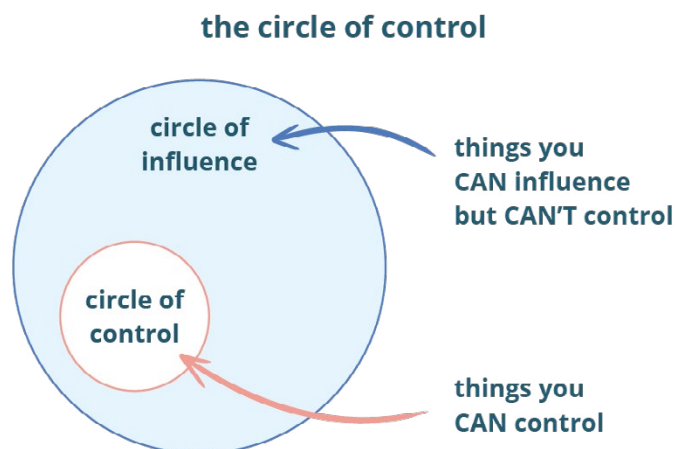


**Tip:** Use follow-up questions to better understand. Follow-up questions can start with “tell me more about...”, “I’m curious”, “what do you mean by...” or something else. For example, if they mention good team work you might ask “what does good team work mean to you?”

## Sort through feedback and take action

You might hear insights about what is and isn't working in the research team. Or about what's getting in the way in your organisation or system – for example, complicated and slow bureaucratic processes. As a team, you might identify:

- why something is happening
- what you/the team can change
- what to ask senior leaders/funders to do to make things easier
- what to advocate for longer-term beyond the project



*adapted from Stephen Covey [8]*

Based on what you can influence, brainstorm ways to address the issues identified, for example: taking time to listen to everyone's perspectives, using less jargon in materials or giving more choices and options for working together.

Consider how you'll share what you're learning (for example, you might write a journal article, write a blog, record a podcast, publish a series of tips on social media or something else). Make your learning accessible.

**Tip:** Revisit team commitments (e.g. values [3], [principles](#) [2] or [mindsets](#) [4]) to work from. For example, if you agreed to share decision-making, you might ask team members to reflect individually on how well the team is sharing decisions, with the option of sharing anonymous feedback.

Then, you might reflect together on:

- each person's perspective
- examples of shared decision-making done well and poorly

After that you might decide what actions to take and decide if the commitments you agreed to need updating.



## key principles in action

The table below gives examples of things you might hear if you're working well together and incorporating the [key principles](#) [2].

the principle	examples – what you're hoping to hear
 <p><b>share decisions</b></p>	<p>we mostly decided together / we worked things out as a team</p> <p>I/we were kept in the loop throughout</p> <p>I/we weren't presented with decisions already made (or, if we were, the reason and the decision-making process was clear)</p> <p>information was shared, I didn't feel like other team members held things back or did things behind my back</p> <p>I felt part of the project the whole way through</p>
 <p><b>value everyone's knowledge equally</b></p>	<p>lived experience was valued equally to professional experience</p> <p>my perspective was valued</p> <p>everyone involved had opportunities to be heard</p> <p>we found solutions together – working things out as a team</p> <p>I felt heard and seen, able to contribute</p> <p>I could challenge people with more positional power to me</p> <p>I wasn't expected to know everything</p> <p>I could lean on others</p> <p>team members listened to my ideas for improvement</p> <p>information was presented in a way we could all understand</p>



**build  
relationships**

my colleagues took time to get to know me  
I felt cared for and about, not just as a worker  
it felt like a partnership  
when something happened I was actively cared for  
I have relationships I didn't have before  
it felt like a worthwhile experience  
I was able to give and get honest feedback

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**recognise  
consumers  
and carers  
for their  
contributions**

my contributions felt as important as everyone else's  
the way I was recognised felt fair and equal to other team members (e.g. payment, learning, co-authoring)  
I got something worthwhile out of this experience  
I was acknowledged in a way that meant something to me

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**be honest  
and flexible**

I knew what was and wasn't possible from the beginning  
information was shared, I didn't feel like other team members held things back or did things behind my back  
I was well supported to take part  
when things changed for me/others we were flexible about including me in different ways or catching me up  
there were various ways to be involved and no pressure to pick just one way  
I was able to give and get honest feedback  
information was presented in different ways  
I made decisions about my participation that worked for me  
I could ask for accommodations and have them met

# when to ask how the process is going

Check in regularly as a team to ask how the process is going.

Don't make assumptions about other team members' experiences or needs.

## at the beginning

**this means:** asking "if this project was successful..."

- what would that look like?
- what would it feel like?
- what would the data tell us?
- how would we have grown individually and as a team?
- what would people say about the project? [5]



Record the answers and hold space for different perspectives.

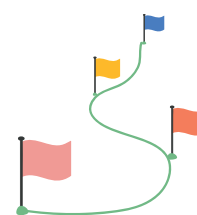
Then you might decide:

- What you'll check in on
- How you'll check in (for example, regular conversations, agenda items, surveys, polls, scheduled group supervision) and when to check in
- Who is responsible for asking (for example, taking turns or using an external evaluator)

## at each milestone or an agreed rhythm (for example, bi-monthly)

**this means:** making checking in a habit, staying curious and taking action

For example, after a workshop you might ask: How did we go meeting our values? After research activities you might ask: Who did we include? Who haven't we heard from?



Don't go too long without checking in (for example, four months is too long even if the work has been slow).

Consider ways to ensure everyone feels heard and can express their feedback without fear of repercussions (such as being kicked-off the team).

**Tip:** Learn from every conversation. Sometimes checking in can be part of incidental conversations. With the consent of the person sharing the feedback, consider what to improve and celebrate what's going well.

## at the end

**this means:** asking everyone involved about their experience (in one-to-one conversations, creative activities, surveys, polls or in other ways)



**Tip:** You might need an external facilitator/evaluator, especially if there are tensions in the project team or issues with sharing information and decisions.

Work together to name learnings and brainstorm solutions for next time.

**Keep everyone in the loop.** Consider how you'll share your findings and update organisational guidelines or processes to reflect your learning.

In addition to the six questions on page 3 you might ask [6]:

- Did those involved feel that the process achieved a positive outcome?
- Did those involved feel that they have increased skills and confidence to undertake co-design in the future?
- Did everyone in the team have an equal say?
- Did people feel adequately prepared and supported to participate in the process?
- Did people feel their unique knowledge and skills were recognised and valued?
- Would people choose to be involved in co-design again in future? What could be done to improve/assist their participation in future?





## references

- [1] Evaluating the public health impact of health promotion interventions: the RE-AIM framework. 1999. Glasgow et al., Am J Public Health. Retrieved from: <https://pubmed.ncbi.nlm.nih.gov/10474547/>
- [2] NSW Regional Health Partners, McKercher, KA, Muller, S. (n.d.) Doing research together: key principles. Retrieved from: <http://doingresearchtogether.com.au/key-principles/>
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- [5] Queensland Government, Metro North. (n.d.). Evaluating co-design. Retrieved from: <https://metronorth.health.qld.gov.au/get-involved/co-design/process/evaluating>
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- [7] New South Wales Government, Ministry of Health. (2023). All of Us: Six ways of working. Retrieved from: <https://www.health.nsw.gov.au/patients/experience/all-of-us/Pages/six-ways-of-working.aspx>
- [8] Covey, S. (1989). The 7 Habits of Highly Successful People.