



 Collaborate to  
**CONNECT**

**Co-Design  
Toolkit**





 *Collaborate to*  
**CONNECT** | **Co-Design Toolkit**

The Collaborate to Connect program was commissioned by Consumers of Mental Health Western Australia (CoMHWa) and funded by the Australian Government Department of Social Services.

---

### **Authors:**

Bridget Clarke  
Jamie Neal  
Michele Burnlar  
Nicholas Da Silva

### **Contributors:**

Alexander York  
Briana Toy  
Coryn Keith  
Dana Pratt-Hague  
Jun Chih  
Kathy Greenwood  
Kaysie Hilton  
Kim Hutchinson  
Melissa Bezuidenhout  
Monique Williamson  
Natalie Middleton  
Nat Smith  
Paula Braimbridge  
Ricki Spencer  
Stephanie Yoong  
Steven Giles



## Acknowledgements

### Acknowledgement of Country

We acknowledge that this work has taken place on Country across Western Australia. CoMHWA's head office is based in Boorloo (Perth), on the lands of the Whadjuk Noongar people, who have cared for this boodjar since time immemorial. We pay our respects to all Traditional Custodians, and to Elders past, present and emerging. We honour their continuing connection to culture, community, land, waters and skies.

### Recognition of Lived Experience

We recognise and honour the leadership, knowledge, and strength of people with lived and living experience of mental health challenges, distress, or psychosocial disability. Your insights shape this work and drive meaningful change in our communities.

### Special Acknowledgements

This work undertaken by the Collaborate to Connect Project team, funded by the Australian Government Department of Social Services.

This work was project-managed and led by Bridget Clarke, with contributions from the Collaborate to Connect team and community partners.

A special thank you to Jamie Neal and Dana Pratt-Hague for their artwork and design contributions to the Collaborate to Connect Toolkit.



## Section 1. Co-Production Galaxy

|                                           |    |
|-------------------------------------------|----|
| ● The Galaxy of Co-Production Visual Tool | 12 |
| ● Planet Co-Discover Visual Tool          | 14 |
| ● Planet Co-Plan Visual Tool              | 15 |
| ● Planet Co-Design Visual Tool            | 16 |
| ● Planet Co-Deliver Visual Tool           | 17 |
| ● Planet Co-Evaluate Visual Tool          | 18 |

## Section 2. Project Planning & Management

|                                                    |    |
|----------------------------------------------------|----|
| ● Co-Design vs Traditional Design Comparison Chart | 20 |
| ● Writing a Project Plan                           | 21 |
| ● Guide to Involvement Agreements                  | 26 |
| ● Involvement Agreement vs Terms of Reference      | 28 |
| ● Risk Assessment and Planning                     | 29 |
| ● Cultural Readiness Assessment for Organisations  | 33 |
| ● Co-Design Evaluation Methods                     | 36 |
| ● Feedback Loop Checklist                          | 37 |
| ● Participant Feedback Template                    | 38 |
| ● Adaptive Co-Design Planning Guide                | 40 |
| ● Recruiting Participants for Co-Design            | 42 |
| ● Inclusive Recruitment Planning Tool              | 44 |
| ● Expression of Interest Template                  | 46 |
| ● EOI Assessment Template                          | 48 |
| ● Meeting Types                                    | 50 |
| ● Group Structures Comparison Table                | 51 |
| ● Co-Design Legacy Tracker                         | 53 |
| ● Celebration & Closure Checklist                  | 54 |

## Section 3. Working with Lived Experience

|                                                  |    |
|--------------------------------------------------|----|
| ● How to Write a Recognition of Lived Experience | 57 |
| ● Mental Health Model and Guide                  | 58 |
| ● Mental Health Model Worksheet                  | 60 |
| ● Power and Privilege Wheel                      | 62 |
| ● Mitigating Power and Privilege Disparities     | 63 |
| ● Plain Language Guide                           | 64 |
| ● Safe Language Guide                            | 65 |

|                                                        | Page No   |
|--------------------------------------------------------|-----------|
| ● A Simple Guide to Pronouns                           | 67        |
| ● Co-Design Readiness Reflection: For Participants     | 68        |
| ● Engaging in a Co-Design Meeting: For Participants    | 70        |
| ● Designing Accessible Workspaces                      | 72        |
| ● A Guide to Adapting to Office Life: For Participants | 76        |
| ● Microsoft Teams Guide                                | 78        |
| <b>Section 4. Facilitation</b>                         | <b>79</b> |
| ● Facilitator Checklist                                | 81        |
| ● Writing a Biography                                  | 82        |
| ● Bias Reflection Tool                                 | 84        |
| ● Safer Disclosure for Facilitators                    | 86        |
| ● Creating a Brave Space: Guide for Facilitators       | 88        |
| ● Trauma-Informed Facilitation                         | 90        |
| ● Engaging in Co-Design Meetings as a Facilitator      | 94        |
| ● Icebreakers                                          | 97        |
| ● Selecting Co-Design Activities                       | 104       |
| ● Adult Learning Guide                                 | 106       |
| ● Facilitator Wellbeing Guide                          | 108       |
| ● Facilitator Reflection Book                          | 111       |



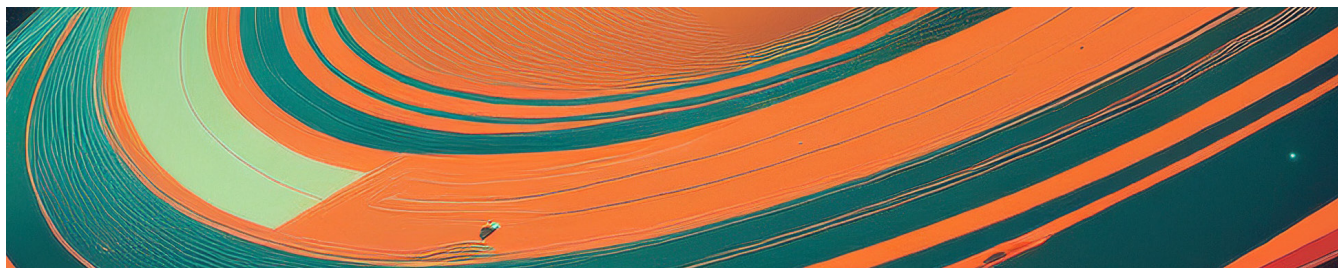
## What is the Collaborate to Connect Toolkit?

The **Collaborate to Connect (C2C) Toolkit** is a practical resource designed to support organisations to plan, deliver, and embed meaningful co-design, particularly with people who have lived experience of psychosocial disability or mental health challenges.

It brings together tools, templates, and guides that can be used at every stage of the co-design journey – from recruitment and planning, to facilitation, reflection, and long-term impact.

Each tool has been developed through co-design, drawing on the insights, lived experience, and practice wisdom of people involved in building the C2C program.

This toolkit was co-designed by a team with both lived and professional expertise, working together to meet the needs of organisations and the communities they serve.



### How the Toolkit Supports C2C Training

This toolkit is designed to complement the C2C training program. Throughout the workshops, we reference these tools as real-world examples of how co-design principles can be applied in practice.

Participants are encouraged to explore and use the tools most relevant to their organisation's needs. They provide practical support for putting the training content into action and helping training participants move from ideas to implementation.

### How to Use This Toolkit

#### **Start where you are:**

You don't need to use every tool. Choose what's most useful based on your co-design goals or where you are in the co-design process.

#### **Use and adapt:**

Tools are flexible, feel free to customise them to your context.

#### **Stay values aligned:**

Many tools reflect trauma-informed, person-centred, and power-sharing principles.



# Glossary of Terms

## **Accessibility**

Designing physical, digital, emotional, and social spaces so that everyone, regardless of ability or background, can participate fully.

## **Authentic Practice**

Acting with honesty, integrity, and alignment between values and actions. It involves being genuine in relationships, transparent in decisions, and consistent in following through on commitments.

## **Brave Space**

A space where people feel safe to speak honestly, share experiences, and engage in respectful dialogue, even when it's uncomfortable.

## **Check-In / Check-Out**

Brief emotional or practical reflections at the start or end of a session, used to build connection and gauge how people are feeling.

## **Co-Design**

A collaborative process where people with lived experience and professionals work together as equal partners to design, shape, or improve services, programs, or policies.

## **Co-Facilitator**

Someone who works alongside another facilitator to support a group or process. They share responsibilities such as guiding discussion, managing group dynamics, and ensuring everyone feels included and heard.

## **Consent**

Giving clear, informed, and voluntary agreement to something. True consent can only happen when people understand what they're agreeing to, have the option to say no, and can change their mind at any time.

## **Co-Production**

An approach where lived experience is involved throughout the entire process — from idea to implementation. It includes several stages.

## **Consumer**

A person who is currently accessing or has previously accessed a mental health service. Often used in mental health policy and service language.

## **Debriefing**

A reflective process offered after emotionally intense or challenging sessions, where participants and facilitators can talk through experiences and receive support.

## **Diverse**

Describes the range of differences that make up communities, including (but not limited to) culture, age, gender, sexuality, ability, neurodiversity, and lived experience.

## **Facilitator**

Someone who guides a group through a discussion, activity, or process. Their role is to support participation, keep things on track, and create a safe and inclusive space where everyone can contribute.

**Feedback Loop**

A process where people share their thoughts or experiences, and that input is listened to, acted on, and followed up.

**Implementation**

The process of putting plans, ideas, or strategies into action.

**Inclusive Practice**

Actively creating environments, language, and processes that welcome diversity and remove barriers to participation.

**Involvement Agreement**

A values-based agreement that outlines roles, expectations, and supports for people with lived experience participating in co-design work.

**Lived Experience**

First-hand knowledge gained through personal experience of mental health challenges, psychosocial disability, or using health and community services.

**Lived Expertise**

The unique insight and skills that come from lived experience, particularly when someone uses their experience to influence systems, policy, or service design.

**Mental Health**

Mental health is a dynamic and multifaceted part of a person's wellbeing. It is shaped by emotional, social, cultural, and systemic factors, and can fluctuate over time.

**Neurodivergent**

Refers to a person whose brain processes, learns, or behaves in ways that differ from what is considered "typical."

**Neuroinclusive**

Creating environments, practices, and systems that welcome and support people with all types of thinking, learning, and communication styles. It focuses on removing barriers and making participation fair and accessible for everyone.

**Plain Language**

Clear and straightforward communication that avoids jargon or technical terms. Plain language helps more people understand and engage.

**Professional Expertise**

The knowledge and skills gained through formal training, education, or work experience in a specific field or role. It often includes technical knowledge, sector experience, and professional standards.

**Pronouns**

The words we use to refer to someone without using their name.

**Psychological Safety**

The feeling of being safe to speak, participate, and take risks without fear of judgment or negative consequences.

**Power-Sharing**

Actively creating conditions where lived experience voices have real influence and decision-making power, rather than being tokenistically included.

**Psychosocial Disability**

A term used to describe the experience of disability related to mental health conditions, including the social and structural barriers that impact participation, inclusion, and rights.

**Psychosomatic**

Refers to the mind–body relationship, especially where physical symptoms are influenced or triggered by mental or emotional factors.

**Terms of Reference (ToR)**

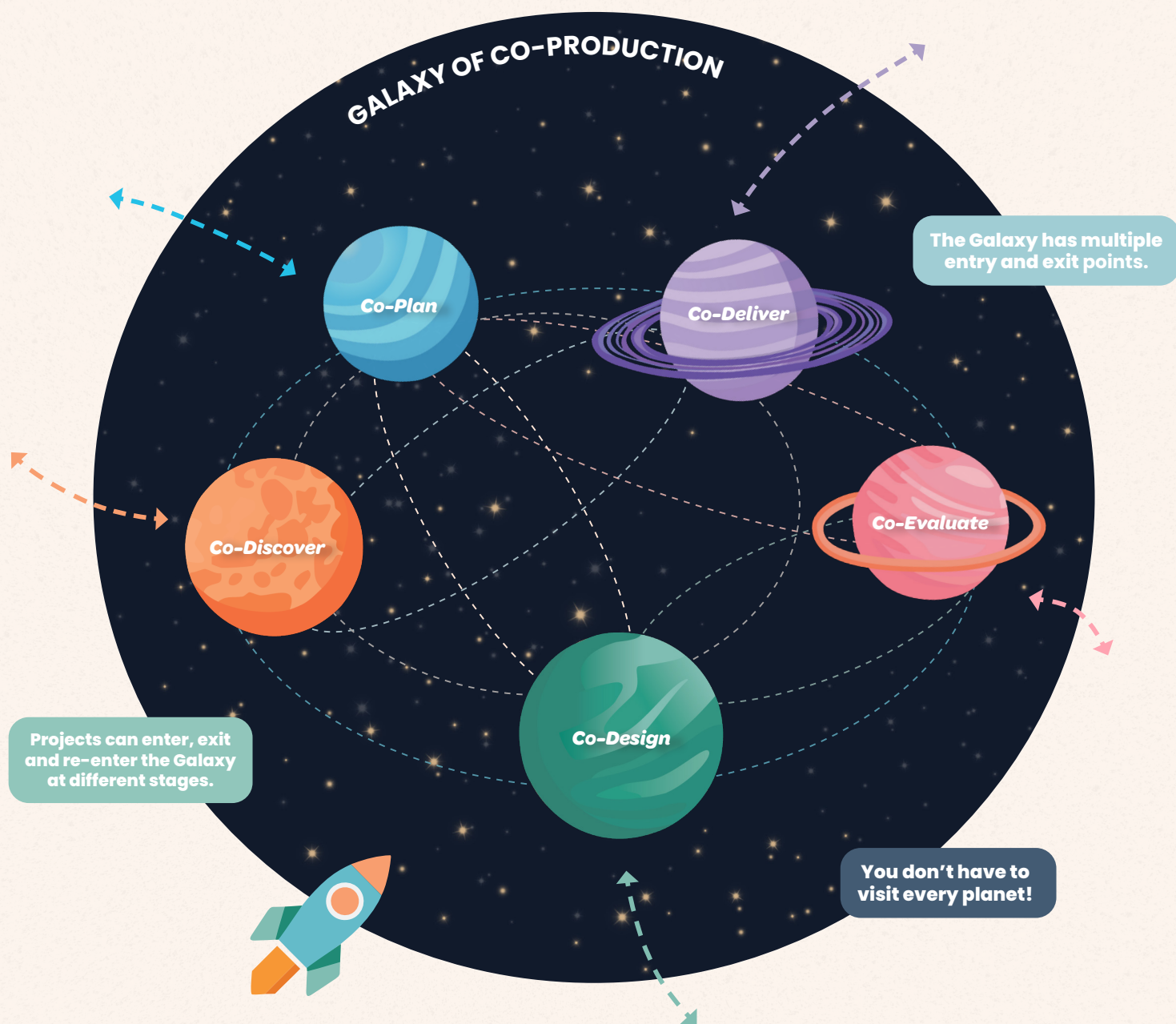
A document that outlines the purpose, structure, and scope of a working group or project team. Often used in governance or advisory settings.

**Trauma-Informed**

An approach that recognises the widespread impact of trauma, avoids retraumatisation, and creates spaces that are physically and emotionally safe.

# Galaxy of Co-Production

Co-Production is a collaborative process where citizens, community members, service users and professionals work together as equals to design, implement and improve initiatives.



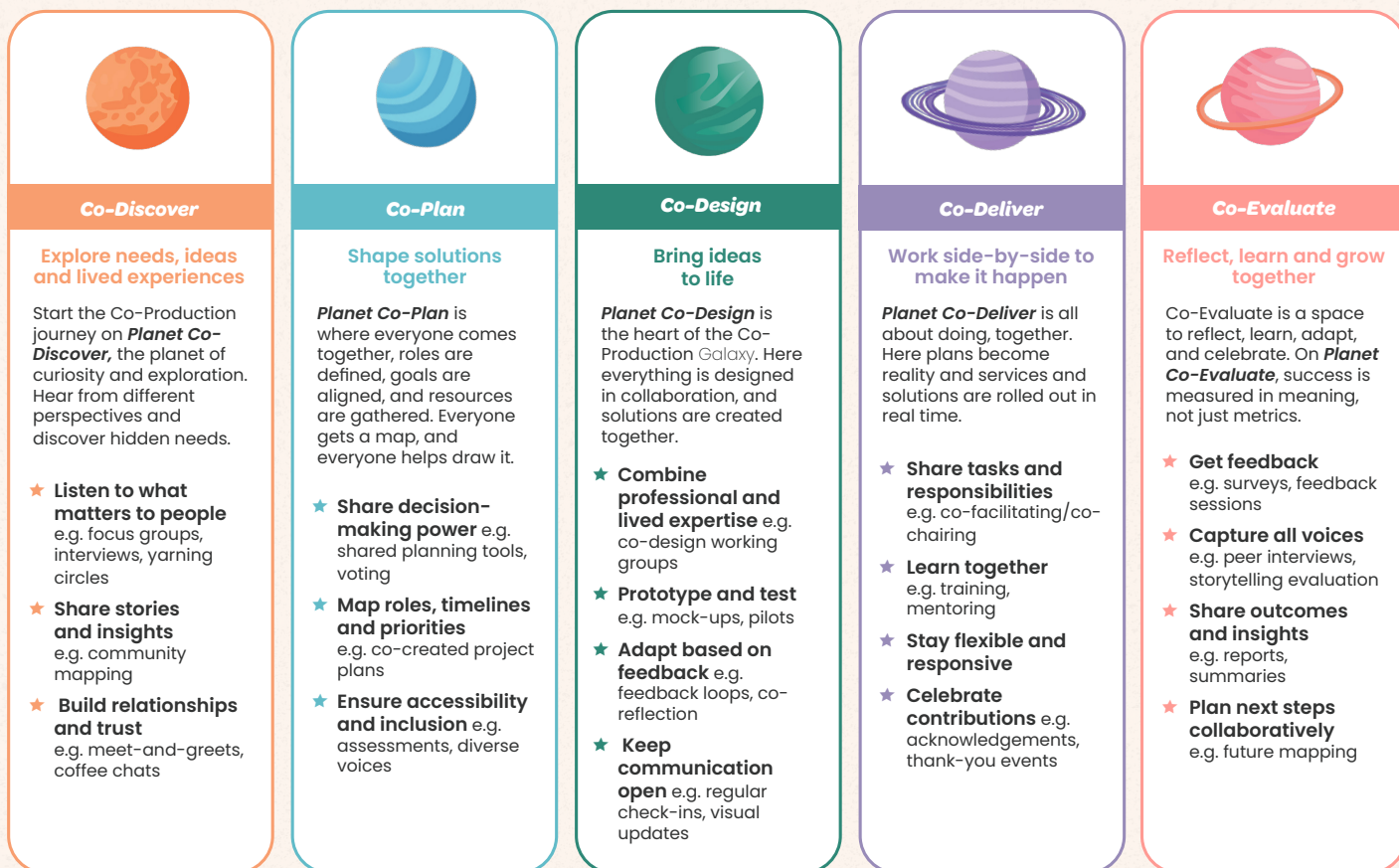


# Galaxy of Co-Production

Co-Production isn't a straight line, it's a galaxy of possibility!

Each stage is a different planet within the *Co-Production Galaxy*. They can work and intersect in different ways.

You can visit one planet, visit a few, or explore them all.



## Possible Co-Production Journeys

### Journey #1

This itinerary is for organisations ready to go beyond consultation! From listening and understanding on **Planet Co-Discover**, to creating and innovating on **Planet Co-Design**, and finally, reflecting and growing on **Planet Co-Evaluate**. Between stops, take time to integrate, plan, and act to bring ideas to life.

- **Visit Planet Co-Discover**
  - Connect with community to gather insights and information.
- **Exit Co-Production Galaxy to plan internally**
- **Visit Planet Co-Design**
  - Design with community members to develop more effective solutions.
- **Exit Co-Production Galaxy to implement and deliver the co-designed solutions**
- **Visit Planet Co-Evaluate**
  - Report back to the co-designers and review your solutions.

### Journey #2

This itinerary is for organisations that have started the groundwork, have already collected data and are ready for action! They co-collaborate and develop practical solutions on **Planet Co-Design**. Then visit **Planet Co-Deliver**, where plans come to life side by side with the very people they're designed to support.

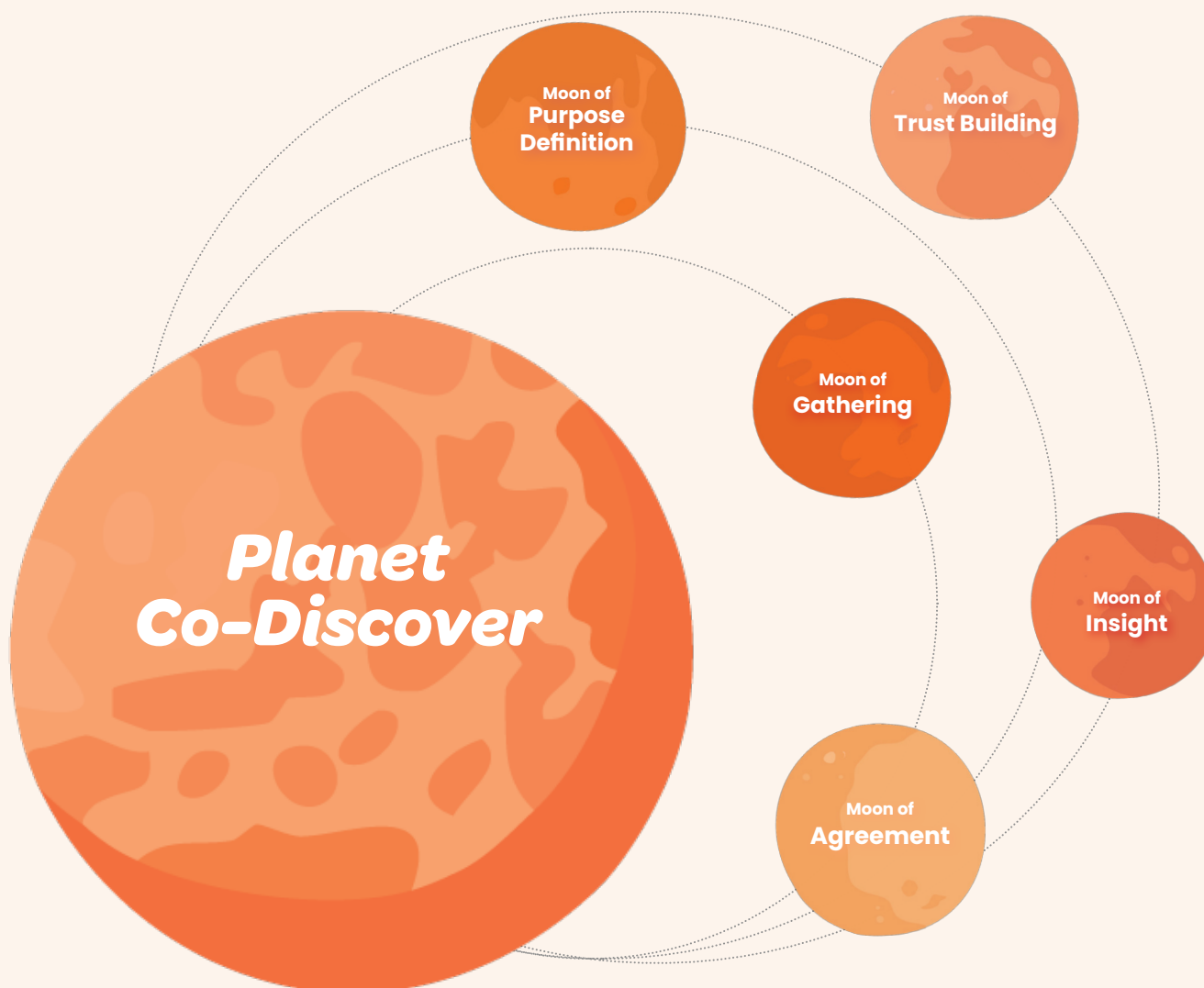
- **Gather data, and plan your project before visiting the Co-Production Galaxy.**
- **Visit Planet Co-Design**
  - Bring your data to community members to collaboratively problem solve.
- **Visit Planet Co-Deliver**
  - Implement solutions alongside community members.
- **Exit the Co-Production Galaxy to internally evaluate the project's strengths and opportunities.**



# The Moons of Planet Co-Discover

## What this stage of co-production is about

Co-discover is about developing a shared understanding of the issue, context, and lived experience. This stage focuses on listening, learning, and determining the problem(s) together, so the work that follows is grounded in what matters most to the people affected.



## The Moons of Planet Co-Discover

### 1. Moon of Purpose Definition

Identifying stakeholders and clarifying the issue or opportunity together.

### 2. Moon of Trust Building

Considering accessibility and safety needs for community members, and providing orientation to the upcoming process.

### 3. Moon of Gathering

Gathering lived experience narratives, mapping systems, and seeking previous evaluation findings.

### 4. Moon of Insight

Synthesising themes and lived experience insights to co-define the problem(s), articulate what needs to change, and prioritise areas for collective action.

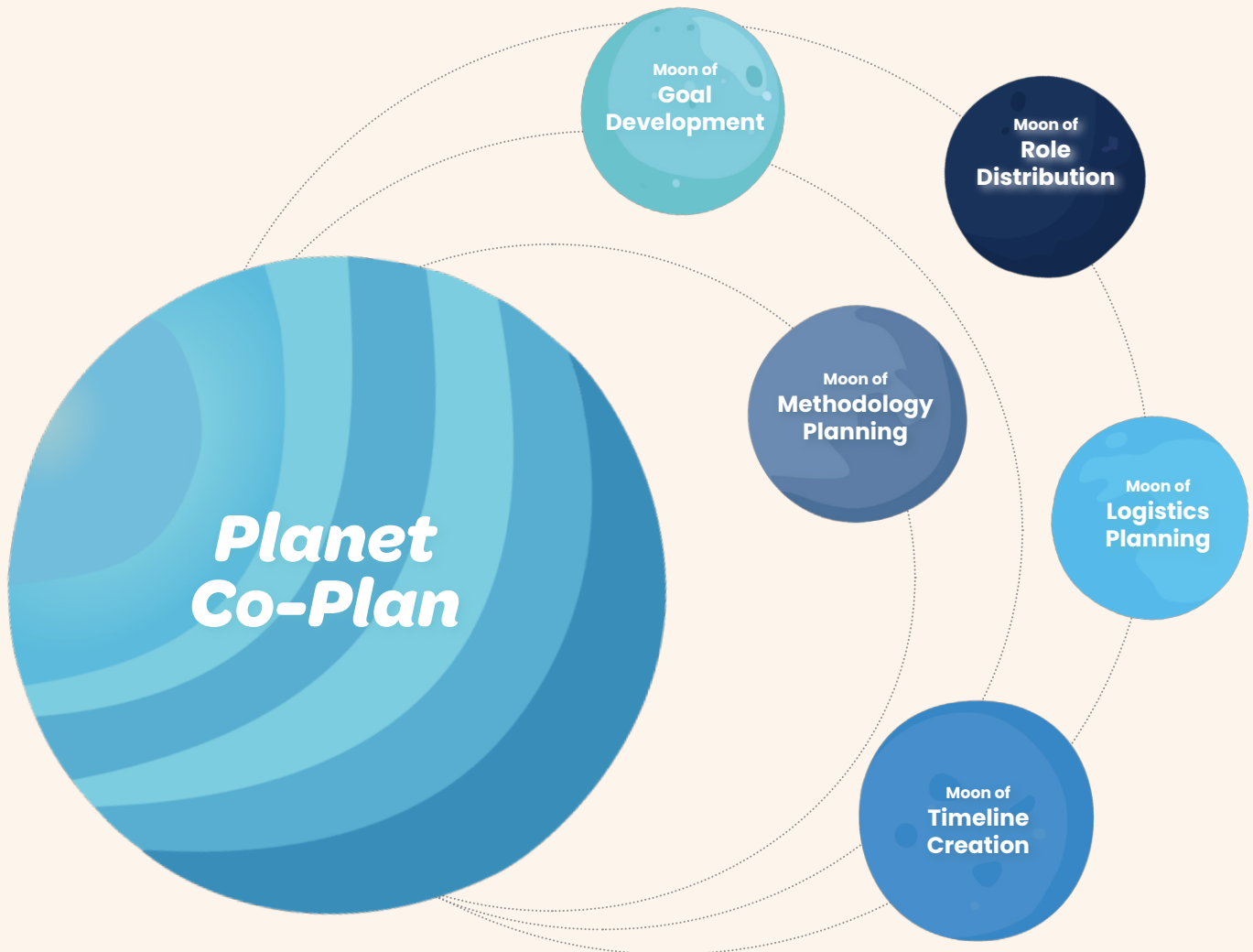
### 5. Moon of Agreement

Establishing shared values and ways of working, and confirming constraints.

# The Moons of Planet Co-Plan

## What this stage of co-production is about

Co-plan is about deciding how the work will happen. Building on shared insights from co-discovery, this stage focuses on setting goals, defining roles, agreeing on decision-making, and planning the structures, supports, and resources needed to work well together.



## The Moons of Planet Co-Plan

### 1. Moon of Goal Development

Translating insights from discovery into clear aims, and agreeing on indicators of success.

### 2. Moon of Role Distribution

Establishing roles, logistics and planning for conflict resolution.

### 3. Moon of Methodology Planning

Choosing the approach to be taken, and planning for inclusion strategies and safety considerations.

### 4. Moon of Logistics Planning

Determining budget, confirming necessary supports and identifying organisational enablers and risks.

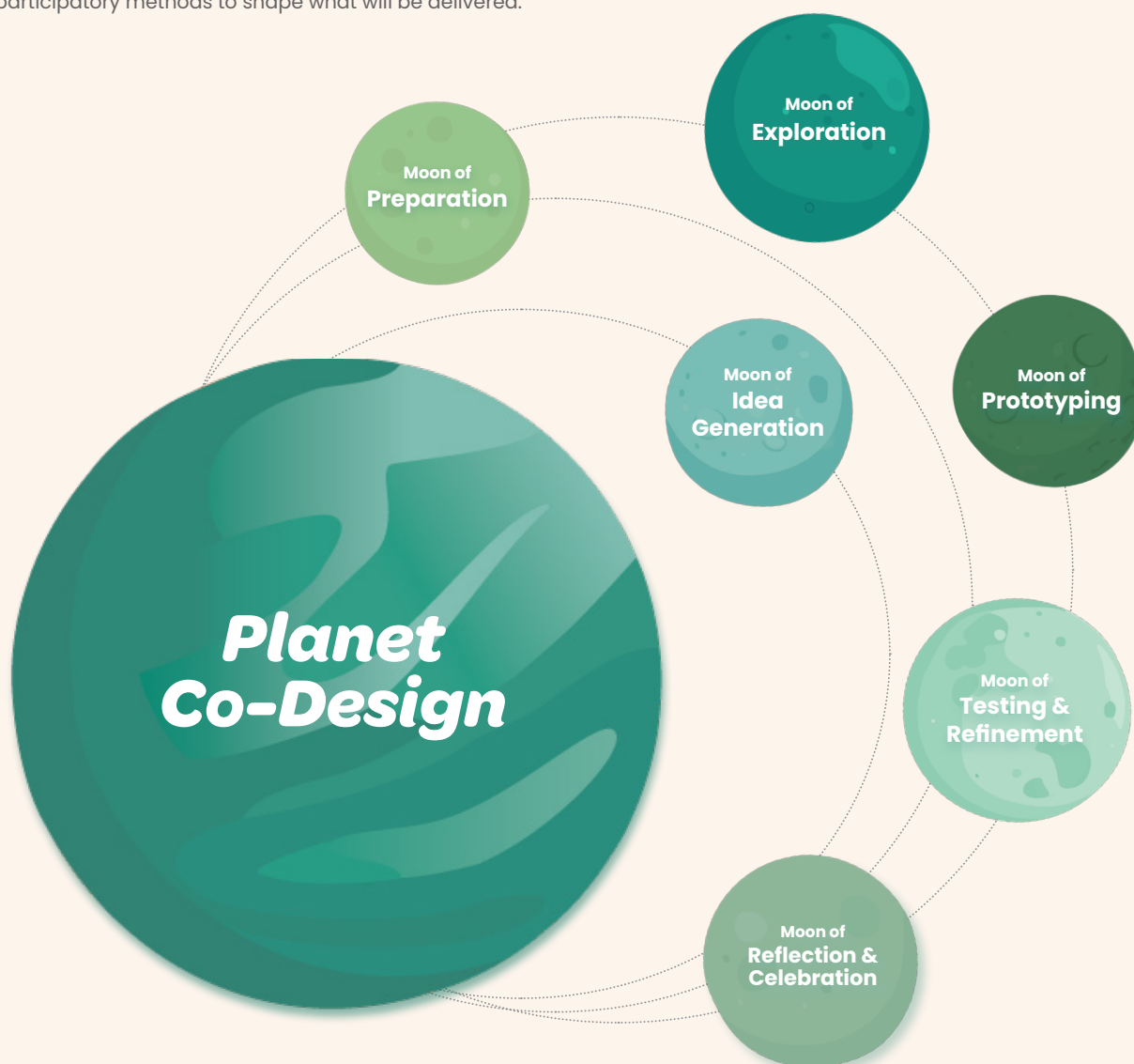
### 5. Moon of Timeline Creation

Co-creating a project roadmap, embedding feedback loops and communication strategy.

# The Moons of Planet Co-Design

## What this stage of co-production is about

Co-design is about collaboratively developing solutions, services, or approaches with lived experience at the centre. This stage focuses on creativity, problem-solving, and testing ideas together, using participatory methods to shape what will be delivered.



## The Moons of Planet Co-Design

### 1. Moon of Preparation

Purpose, roles, safety – what are we here to design? How will we work together?

### 2. Moon of Exploration

Gather stories, insights – what matters most to people? What are strengths and barriers?

### 3. Moon of Idea Generation

Creating potential solutions – what are the different ways we could resolve this problem?

### 4. Moon of Prototyping

Tangibilise ideas creatively – what could this look like or feel like in practice?

### 5. Moon of Testing & Refinement

Validate designs and improve through feedback. What works? What doesn't?

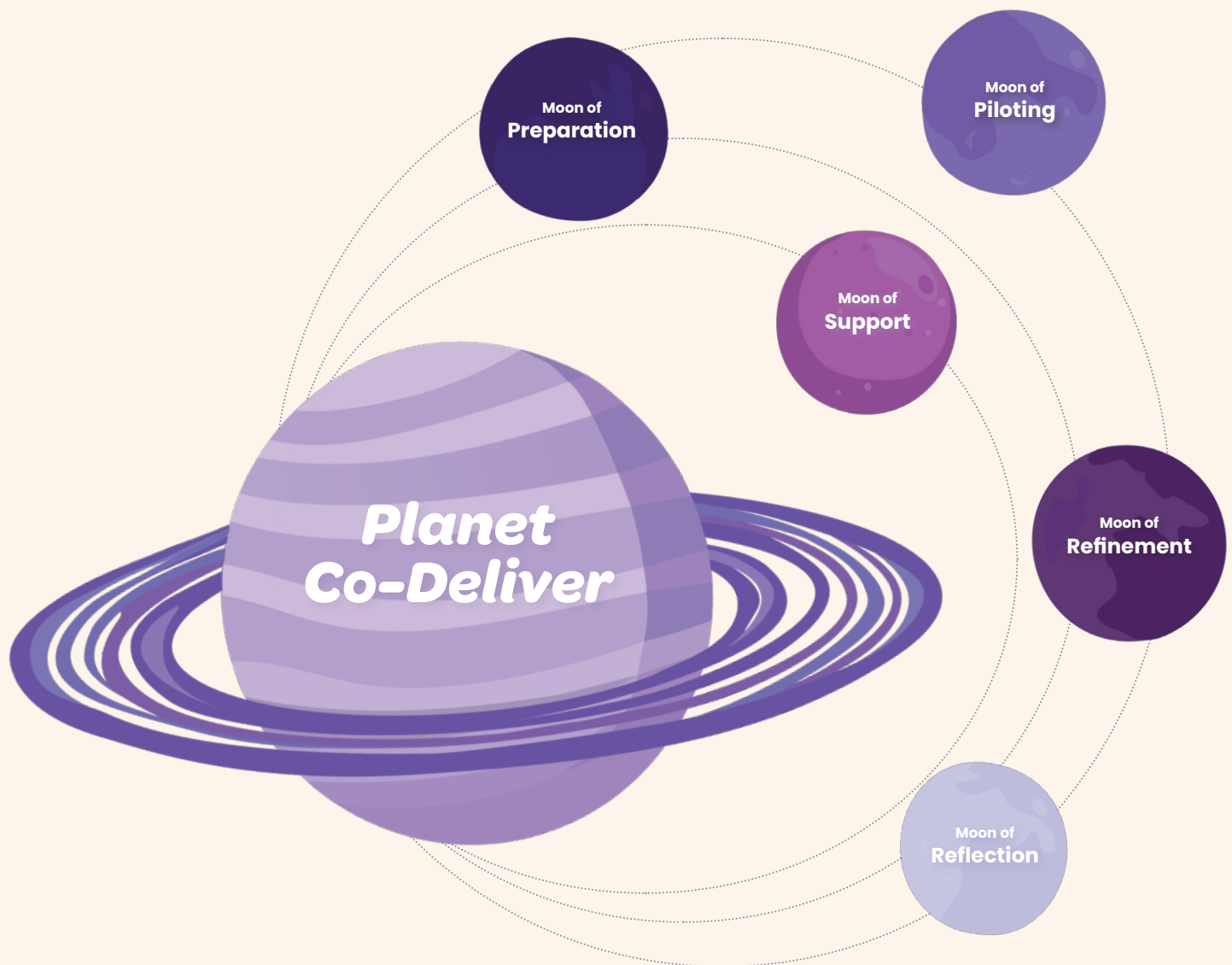
### 6. Moon of Reflection & Celebration

Select the preferred solution and close design loop. What are we taking forward? What did we learn?

# The Moons of Planet Co-Deliver

## What this stage of co-production is about

Co-deliver is about implementing the work together. This stage focuses on shared delivery, piloting or rolling out solutions, maintaining safety and support, and adapting in response to feedback so the work remains aligned with lived experience and agreed intentions.



## The Moons of Planet Co-Deliver

### 1. Moon of Preparation

Co-developing roles and providing training materials to lived experience representatives.

### 2. Moon of Piloting

Conducting small scale pilots to refine approach, incorporating feedback mechanisms.

### 3. Moon of Support

Ensuring regular check-ins and support are taking place, whilst monitoring risks and making adjustments as needed.

### 4. Moon of Refinement

Co-reflecting on what's working and what could be improved, ensuring communication remains open.

### 5. Moon of Reflection

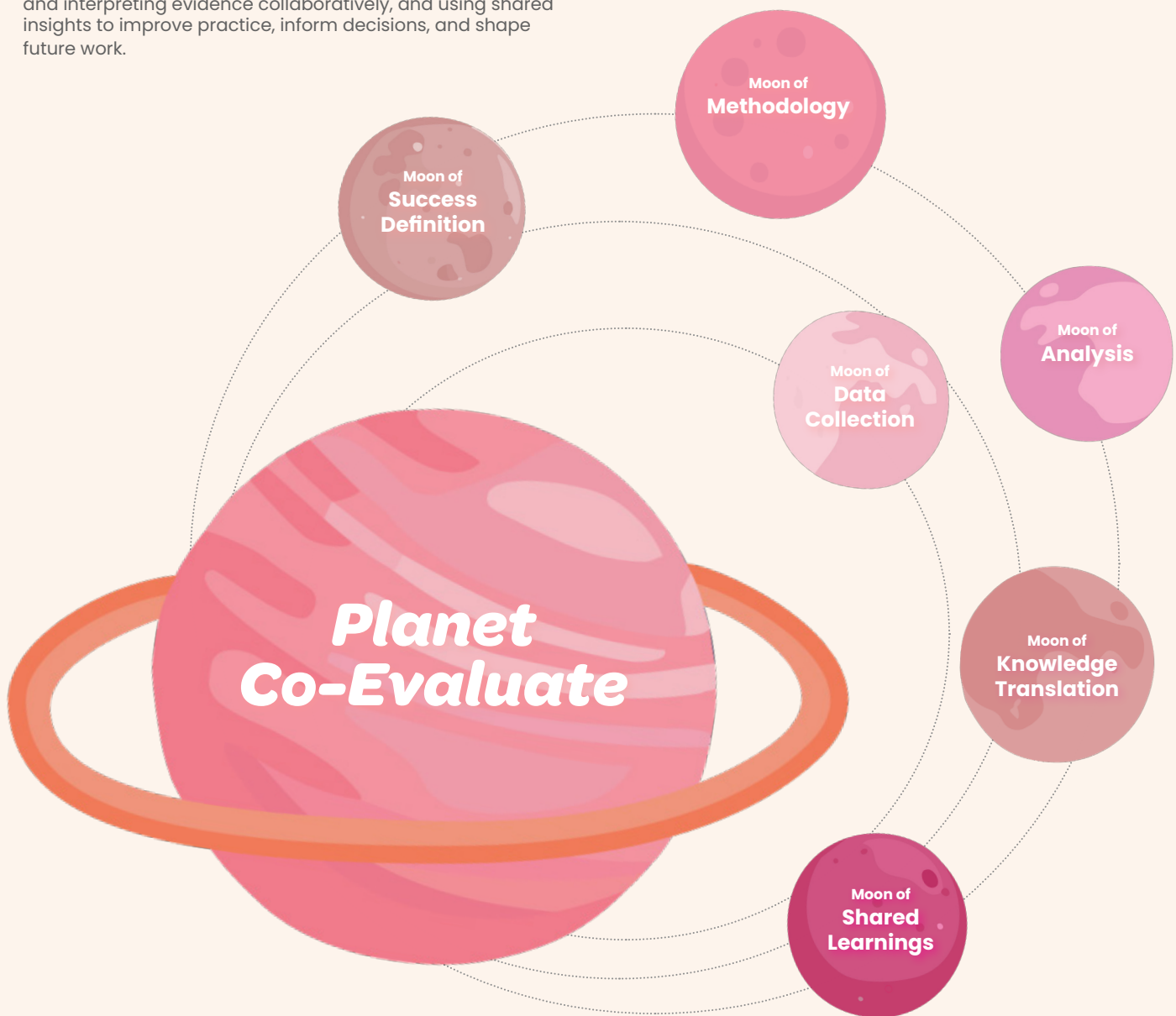
Reflecting collectively on the success of the delivery, and sharing learnings.



# The Moons of Planet Co-Evaluate

## What this stage of co-production is about

Co-evaluate is about understanding impact and learning together. This stage focuses on defining success, collecting and interpreting evidence collaboratively, and using shared insights to improve practice, inform decisions, and shape future work.



## The Moons of Planet Co-Evaluate

### 1. Moon of Success Definition

Deciding with lived experience representatives what needs to be measured, including qualitative and quantitative measures.

### 2. Moon of Methodology

Choosing appropriate ways to collect evidence and planning how lived experience evaluators will lead aspects.

### 3. Moon of Data Collection

Collecting data with lived experience evaluators, ensuring ethical practice.

### 4. Moon of Analysis

Co-sense-making to interpret data and identify patterns, meanings, unintended consequences and barriers.

### 5. Moon of Knowledge Translation

Collaboratively drafting evaluation findings, and co-developing recommendations.

### 6. Moon of Shared Learnings

Sharing findings widely and integrating learnings into policy, practice, or future project plans.



# **Project Management**

*Handwritten signature*

# Co-Design vs Traditional Design Comparison Chart

A quick-reference chart that compares co-design to traditional design approaches. Use this to understand how values, roles, and processes differ.



## Fundamental steps of design:

- 1. **Discover:** Identify and understand the problem.
- 2. **Define:** Define your purpose and establish clear objectives.
- 3. **Develop:** Create potential solutions to test and refine.
- 4. **Deliver:** Implement solutions and gather feedback for improvement.

| FUNDAMENTAL STEPS OF DESIGN | TRADITIONAL DESIGN                                        | CO-DESIGN                                                                                                    |
|-----------------------------|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| 1. Discover                 | Experts identify and research the problem.                | People with lived experience help identify and define the problem, ensuring it reflects real need.           |
| 2. Define                   | Professionals decide the project's goals and direction.   | Goals and priorities are decided on with those affected, ensuring shared power in decision making.           |
| 3. Develop                  | Experts design, test, and refine solutions.               | Solutions are designed, tested and improved together, blending professional expertise with lived experience. |
| 4. Deliver                  | A final design is implemented, and feedback is collected. | Implementation is ongoing and adaptive, with shared ownership and continuous collaboration.                  |

# Writing a Project Plan

Explains what goes into a strong co-design project plan with sections, examples, and a template to get started.

## Sections of a Co-Design Project Planning Document

### 1. Project Overview

- What is the project?
- Why is co-design being used?

Begin the plan by clearly outlining what the project is, the issue or opportunity it is responding to, and why the work is needed now. This section should explain why co-design is being used and how involving lived experience expertise will lead to more relevant, equitable and effective results.

### 2. Scope

- What is included and what is out of scope?
- What constraints should be made transparent (e.g., time, budget, resources)?

Clearly outline what is included in the project and what sits outside its scope to support transparency and manage expectations. This section should name any known constraints and explain these where possible so stakeholders can understand the broader context.

### 3. Objectives

- What change is this project aiming to achieve?
- How will these outcomes support people with lived experience?

Describe the change/s the project aims to achieve and how these outcomes will support people with lived experience. Objectives should be specific, realistic and clearly linked to community needs, reflecting both what the project will produce and how people will work together.

### 4. Deliverables

- What will the project produce or create?
- What are the non-negotiables?
- Which deliverables will be co-designed and which won't?

Outline the tangible outputs the project will produce, such as resources, redesigned processes, tools or recommendations. Ensure the deliverables clearly link back to the project objectives and identify which deliverables will be co-designed and which elements are fixed or non-negotiable due to constraints.

## 5. Methods and Approach

- How will co-design be facilitated?
- How will co-design be evaluated?

Describe how co-design will be facilitated, including the types of activities that will be used and how collaboration will be supported. This section should also explain how the co-design process will be evaluated, focusing on the quality of participation and decision-making. Clearly outline how feedback will be gathered, used and shared throughout the project to support continuous learning and improvement.

## 6. Roles and Responsibilities

- What and who are the key roles in your project?
- What is each role responsible for?

Identify the key roles needed for the project and what each role is responsible for. This section should highlight lived experience roles as essential in the process and describe how responsibilities are shared across the team.

## 7. Inclusive Practice and Accessibility

- What are the guiding principles for the co-design process?
- How do we ensure accessibility, emotional safety and flexibility?

Describe the guiding principles that will shape the co-design process and how accessibility, emotional safety and flexibility will be supported. This section should address project specific practical, cultural, emotional and communication needs.

## 8. Timeline and Key Milestones

- What are the key milestones?
- How and when will we recognise progress and completion?

Provide an overview of the project timeline and key milestones to help stakeholders understand how the work will progress. While co-design requires flexibility, a clear timeline supports commitment and shared understanding. This section should outline major phases, key decision points and how progress and completion will be recognised.



**Project Title:** Redesigning the Intake Process at Community Connect Mental Health Service

**Date:** April 2025

**Prepared by:** CoMHWa Co-Design Team

## Project Overview

This project will redesign the intake and on-boarding process for Community Connect, a mental health service supporting adults experiencing psychosocial disability. Feedback from service users and staff indicates that the current intake process can feel disempowering, overwhelming and difficult to navigate, particularly for people with experiences of trauma or systemic barriers to care. A co-design approach will be used to ensure the redesigned intake process is welcoming, accessible and responsive to the diverse needs of people using the service, with lived experience voices playing a central role in shaping decisions and outcomes.

## Project Objectives

The primary objective is to co-create an intake process that is trauma-informed, culturally safe, and easy to navigate. This includes redesigning the intake form, clarifying the steps of the intake journey and improving how people are welcomed into the service. Secondary objectives include strengthening relationships between service users and staff, improving trust and engagement during first contact, and building internal capability to support ongoing co-design practice.

## Scope

**This project will focus specifically on:**

- The intake form and accompanying documents.
- Initial contact and welcome processes (e.g., first phone call, email, or visit).
- Signposting to services and supports during intake.

**Out of scope:**

- Clinical assessments and diagnosis processes.
- Broader organisational strategy or service delivery changes.
- Development of digital systems (although recommendations may be made).
- We acknowledge that these boundaries may be limiting, and we will be transparent with participants about what can and cannot be changed at this stage.

## Project Deliverables

**This project will result in the following co-designed deliverables:**

- A revised intake form that is accessible, easy to understand, and trauma-informed.
- Supporting documents or communication templates to guide initial contact and welcoming practices (e.g., email, phone scripts).
- A summary of co-design insights and recommendations, to inform future service improvements.
- Visual tools or user journey maps that clarify the intake process for both staff and service users.
- A final project report, including contributions from co-designers and feedback on the process.

These deliverables will be developed collaboratively, with lived experience input at each stage. Some materials will also be tested and refined through feedback and pilot sessions.

## Methods and Approach

### Facilitation approach:

Co-design sessions will focus on improving real experiences of entering Community Connect, with facilitation centred on lived experience leadership, accessibility and emotional safety.

Each phase of the process will be centre relational and inclusive practices, including:

- Co-facilitation by a lived experience facilitator.
- Activities mapping the intake journey and identifying barriers.
- Flexible ways to participate (spoken, written, visual).

Session documentation will be available to all co-designers through a secure OneDrive file and all sessions will have minutes recorded for approval from the group.

### Evaluation approach:

Evaluation will focus on whether the co-design process and outputs improve clarity, safety and accessibility of the intake experience.

Evaluation will include:

- Participant feedback (verbal reflections, surveys).
- Facilitator reflections after each session.
- Review and testing of draft intake materials with co-designers.

Feedback will be integrated throughout the process to improve ongoing practice.

### The co-design process will follow four key stages:

1. **Discovery:** Listening and gathering experiences of current intake process.
2. **Ideation:** Generating ideas and possibilities for change.
3. **Prototyping:** Testing and refining tools or approaches.
4. **Reflection and Sharing:** Evaluating the process and sharing learnings and outcomes.

## Roles and Responsibilities

| Role                            | Name/Team                                                 | Responsibility                             |
|---------------------------------|-----------------------------------------------------------|--------------------------------------------|
| Project Manager                 | James Yu (Community Connect)                              | Logistics, internal coordination           |
| Lived Experience Co-Facilitator | Zara Thompson (CoMHWa)                                    | Facilitation, peer support, values holding |
| Co-Design Contributors          | 6 people with lived experience of psychosocial disability | Provide input and co-create designs        |
| Staff Participants              | Intake team at Community Connect                          | Provide insights and participate in design |
| Graphic Designer                | External contractor                                       | Format final documents and visual tools    |
| Executive Sponsor               | Maya El-Baz (Director of Services)                        | Support implementation and oversight       |

## Timeline and Key Milestones

| Phase                    | Key Dates     | Description                                                             |
|--------------------------|---------------|-------------------------------------------------------------------------|
| Discovery workshops      | May 1–30      | Four workshops with lived experience contributors to map intake journey |
| Staff engagement         | Jun 1–15      | Workshop with intake and admin staff                                    |
| Co-creation sessions     | Jun 15–Jul 30 | Joint ideation and prototyping                                          |
| Prototype testing        | Jul 30–Aug 30 | Testing draft intake process with contributors                          |
| Finalisation and sharing | Oct 1 –30     | Project report and presentation to leadership                           |

## Inclusive Practice and Accessibility

This co-design project will be grounded in the following values:

- **Accessibility:** We will provide multiple ways to participate (in-person, online, written, verbal) and adapted materials for a range of access needs.
- **Cultural safety:** We will acknowledge and respond to cultural norms, preferences, and lived experience. This includes building trust before sessions and offering options like quiet spaces.
- **Shared power:** All decisions about group process, ways of working, and what is created will be shared as much as possible with agreed decision-making models.
- **Emotional safety:** Check-ins, debriefs, and optional peer support will be built into each session.

We recognise that inclusion is not a one-off task, but continuous commitment to adapt, listen and respond.

# Guide to Involvement Agreements

A practical guide and template to help define roles, expectations, and supports for people with lived experience involved in your project.

## What is an Involvement Agreement?

It is important to have an Involvement Agreement when working with people who are not formally employed but are contributing their lived experience through co-design, advisory or representative roles.

It provides:

- Clarity about roles, expectations and responsibilities.
- Protects for both participants and the organisation.
- A shared understanding of payment arrangements.
- Boundaries around time commitment, confidentiality, and support needs.

## How to Structure an Effective Involvement Agreement

### 1. Define the Scope of Involvement

- What is the purpose of the involvement? (advisory, decision-making, co-design).
- What are the expectations? (meeting attendance, input on policy, etc.).
- What is the timeframe? (is participation ongoing or time-limited?).
- Consider including what is out of scope or any non-negotiables (timeline, budget).

### 2. Ensure Informed Consent

- Clearly explain what the consumer is agreeing to.
- Provide project details, roles, and any risks or benefits.
- Ensure participants sign the agreement voluntarily.
- Allow consumers to ask questions before signing.
- Outline support pathways to understand the agreement (if relevant).

### 3. Confidentiality and Data Protection

- Define what information should remain confidential.
- Ensure compliance with data protection laws.
- Clarify how personal data will be stored and used.
- Outline any mandatory reporting requirements (if applicable).
- Avoid vague statements about confidentiality.

#### 4. Compensation and Reimbursement

- Clearly state whether consumers will be compensated.
- Include details on honorariums, stipends, or reimbursement for expenses.
- Explain how consumers can claim expenses (e.g., travel, internet costs).
- Do not leave this information out, transparency is key.

#### 5. Termination of Agreement

- Define how and when participation can end.
- Clarify if consumers can leave at any time.
- State if the organisation has the right to remove a member under certain conditions.
- Avoid unclear terms about exit processes.

#### 6. Media & Photo/Video Consent

- Include an opt-in/opt-out section for photos and recordings.
- Clearly explain how media will be used.
- Ensure that consumers give explicit permission before their image is shared.

---

### Final Checklist for an Effective Involvement Agreement

Is the purpose and scope of involvement clearly defined?



Are confidentiality and data protection measures included?



Does the agreement state compensation or reimbursement details?



Does it outline termination conditions?



Are media consent options provided?



Has the agreement been reviewed for clarity and fairness?





# Involvement Agreement vs Terms of Reference

## Differences between Involvement Agreements and Terms of Reference.

**Involvement Agreement:** A mutual agreement between an organisation and a consumer outlining expectations, roles, confidentiality, and participation terms. It focuses on protecting both parties while ensuring ethical and meaningful involvement.

**Terms of Reference (ToR):** A guiding document that defines the purpose, scope, structure, and operational procedures of a group, committee, or project. It sets out how decisions are made, member roles, and governance processes.

### How to structure:

| Aspect                            | Involvement Agreement                                                                       | Terms of Reference (ToR)                                                                                                                 |
|-----------------------------------|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PURPOSE</b>                    | Defines an individual's role, rights, and responsibilities in a project or advisory group.  | Describes the overall reason for forming the group and the goal it aims to achieve.                                                      |
| <b>SCOPE</b>                      | Clarifies the personal agreement between an individual and the organisation.                | Defines the groups responsibilities, decision boundaries, and areas of in.                                                               |
| <b>FOCUS</b>                      | Outlines the ethical engagement and individual responsibilities.                            | Outlines the operational part of the group, priorities and types of activities the group will concerntrate on.                           |
| <b>WHO IT APPLIES TO</b>          | Specifies the individual consumer, advisory member, or participants.                        | Specifies which members, roles or stakeholders the ToR applies to.                                                                       |
| <b>CONFIDENTIALITY</b>            | Includes personal data protection and confidentiality agreements.                           | Covers confidentiality broadly but focuses on group-level discussions and information sharing.                                           |
| <b>DECISION-MAKING</b>            | Defines the individual's level of influence or input.                                       | Outlines decision-making and establishing the feedback loop, outlining how insights are collected, reviewed, and acted within the group. |
| <b>COMMITMENT LEVEL</b>           | States the duration and conditions for participation.                                       | Sets expectations for ongoing involvement and meeting frequency.                                                                         |
| <b>COMPENSATION &amp; SUPPORT</b> | States compensation and reimbursements, or support for individual involvement.              | Typically does not include individual compensation but may outline funding sources for the group.                                        |
| <b>EXIT CLAUSE</b>                | Outlines how individuals can leave or be removed from participation.                        | Specifies how the group can evolve and dissolve. Specifies restructure processes.                                                        |
| <b>CONFLICT RESOLUTION</b>        | May include an individual process for raising concerns or grievances with the organisation. | Establishes group-wide processes for resolving conflicts and decision-making challenges.                                                 |

## Models of Shared Decision-Making

This tool supports organisations and co-design teams to intentionally choose how decisions will be made throughout a co-design process.

### How to Use This Tool

Shared decision-making is not one single approach. Different decisions may require different models depending on:

- Risk and responsibility
- Time-frames and constraints
- The impact on people with lived experience
- Organisational or funding requirements

This table outlines several common models that can be used alone or in combination across a project.

| Model                           | How it works                                                                      | Good For                              |
|---------------------------------|-----------------------------------------------------------------------------------|---------------------------------------|
| <b>Unanimous Agreement</b>      | Everyone must agree before moving forward                                         | Deep collaboration, high trust groups |
| <b>Group Consensus</b>          | Group votes, majority rules with open discussion                                  | Diverse groups needing fast decisions |
| <b>Rotating Decision-Makers</b> | Decision-making roles shift between members                                       | Building shared leadership            |
| <b>Delegated Authority</b>      | Specific decisions are assigned to sub-groups or individuals                      | Empowering lived experience voices    |
| <b>Joint Sign Off</b>           | Requires agreement from both organisation staff and lived experience participants | Formal partnerships                   |

### Good Practice Notes

- **Be explicit:** Name the model being used for each decision
- **Avoid assumptions:** “Consultation” is not the same as shared decision-making
- **Document agreements:** Include decision models in project plans or Terms of Reference
- **Review regularly:** Decision-making needs may shift as trust, capacity, and scope change
- **Close the loop:** Always explain how input influenced the final decision

# Risk Assessment and Planning

A tool for assessing and visualising potential risks in your project. Helps teams prioritise what needs to be managed or mitigated.

## Risks: Co-Design Context

When undertaking any project work, it is important to be aware of potential pitfalls and pro-actively preparing for them. Below are examples of key areas organisations may want to consider when entering the co-design process. These examples are grouped into three broad categories, reflecting the source of the risk and its potential impact.

| Risk Type                                                                                                                  | Examples                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Readiness Risks</b><br><i>Risks related to whether the organisation and project are prepared to undertake co-design</i> | <ul style="list-style-type: none"><li>• Are sufficient time, budget and staff resources allocated to support co-design?</li><li>• Is there clear leadership and executive support for co-design?</li><li>• What are the consequences if co-design is rushed, under resourced or poorly supported?</li></ul>            |
| <b>Expectation Risks</b><br><i>Risks related to unclear, unrealistic or misaligned expectations</i>                        | <ul style="list-style-type: none"><li>• Are goals realistic and clear about what can and cannot be co-designed?</li><li>• What plans or policies are needed to support unforeseen project challenges?</li><li>• Will project outcomes realistically meet both organisational priorities and community needs?</li></ul> |
| <b>Psychological Risks</b><br><i>Risks related to emotional safety, wellbeing and potential harm to participants</i>       | <ul style="list-style-type: none"><li>• Are facilitators and staff trained in trauma-informed practice?</li><li>• Have potential risks of emotional distress or re-traumatisation been identified?</li><li>• Are there clear support strategies to support the wellbeing of staff and participants?</li></ul>          |

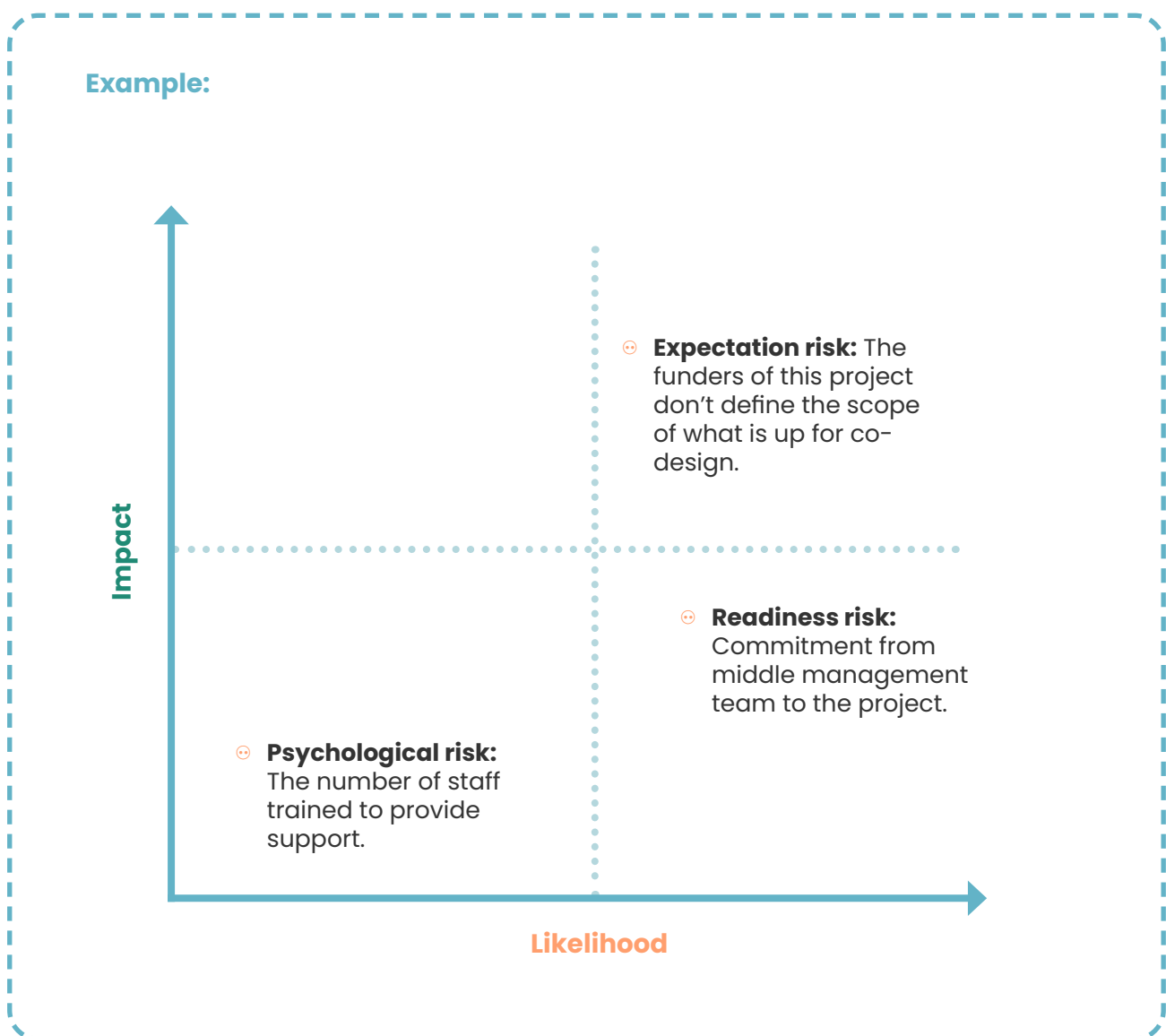
## Visual Mapping of Risk

The table below can serve as a starting point for visually mapping out potential risks within your organisation.

It helps prioritise risks based on how likely they are to occur and how severe their consequences could be.

**X-axis: Likelihood** – How probable it is that the risk will occur (e.g. rare to almost certain).

**Y-axis: Impact** – The severity of the consequences if the risk occurs (e.g. minor to catastrophic).

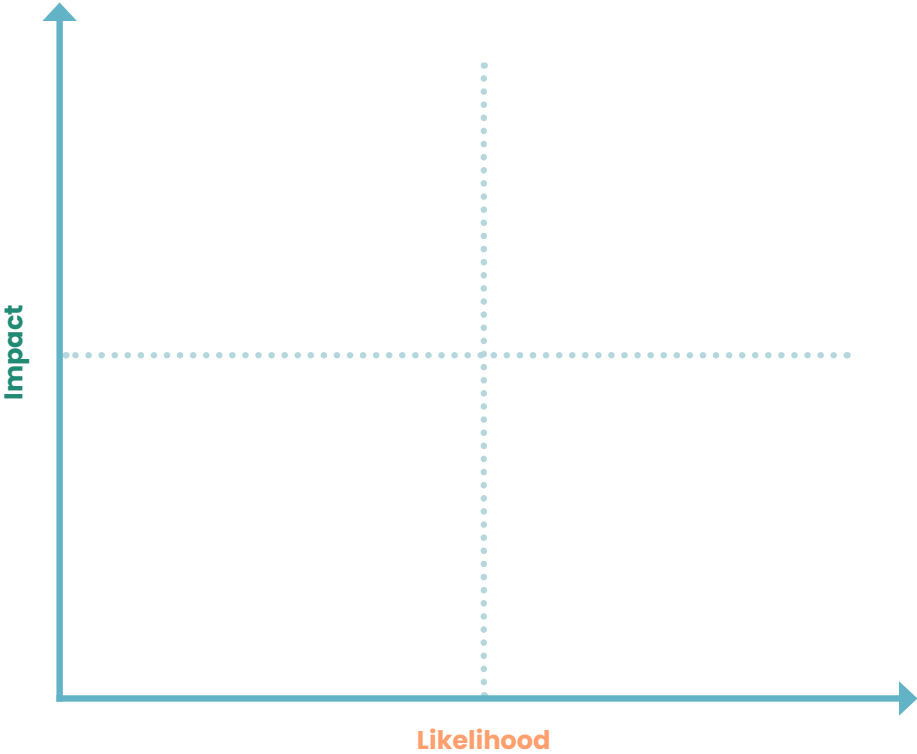


# Mapping Potential Risks

| Risk Type           | Examples |
|---------------------|----------|
| Readiness Risks     |          |
| Expectation Risks   |          |
| Psychological Risks |          |

## Risk Strategy and Priority:

Map your potential risks below:





# First Nations Cultural Readiness Assessment

Supports teams to assess their cultural safety and inclusivity before engaging with First Nations communities in co-design.

**Creating a safe and culturally respectful environment is essential for genuine co-design.**

It is the responsibility of the organisation to ensure that First Nations participants feel welcome, safe, and able to participate authentically with your organisation.

This tool is not a test, but a reflection tool to assess your organisation's readiness and identify areas for growth.

| Do we...                                                                                                                                                                                             | Never/ No                                                                                                                                                                                                                              | Sometimes/ A little | Always/ Yes |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------|
| <b>Have a diverse workforce?</b>                                                                                                                                                                     |                                                                                                                                                                                                                                        |                     |             |
| <b>Why it matters:</b><br>When consumers see people like themselves represented among staff, it signals that their voices and experiences will be taken seriously.                                   | <b>How to improve:</b><br>Consider implementing a values-based recruitment strategy. <a href="#">Learn more at Kika's Guide to Values Based Hiring.</a>                                                                                |                     |             |
| <b>Have policies to prevent and respond to racism and discrimination?</b>                                                                                                                            |                                                                                                                                                                                                                                        |                     |             |
| <b>Why it matters:</b><br>Discrimination can't always be avoided, but a workplace that prepares for it—with clear policies and accountability—will be safer and healthier for everyone.              | <b>How to improve:</b><br>Develop clear policies that address discrimination. <a href="#">Check out the Australian Human Rights employer resources for more info.</a>                                                                  |                     |             |
| <b>Acknowledge and support cultural diversity?</b>                                                                                                                                                   |                                                                                                                                                                                                                                        |                     |             |
| <b>Why it matters:</b><br>Not everyone shares the same cultural background or speaks English as a first language. Recognising these differences ensures consumers and staff feel seen and supported. | <b>How to improve:</b><br>Create explicit policies addressing cultural and linguistic diversity. <a href="#">Read Multicultural NSW's Cultural Diversity in Policy for reference.</a>                                                  |                     |             |
| <b>Have policies that address the needs of people?</b>                                                                                                                                               |                                                                                                                                                                                                                                        |                     |             |
| <b>Why it matters:</b><br>The impact of colonisation, including the Stolen Generations, continues today. Policies that recognise this legacy are critical to avoiding harm and building trust.       | <b>How to improve:</b><br>Consider developing policies that address the needs of First Nations people. Explore <a href="#">Kimberley Aboriginal Health Planning Forum's Cultural Security Framework framework</a> as a starting point. |                     |             |

| Do we...                                                                                                                                                                                      | Never/ No                                                                                                                                                                                                                                                                                                                                                    | Sometimes/ A little | Always/ Yes |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------|
| <b>Provide mandatory cultural competency and Acknowledgement of Country training?</b>                                                                                                         |                                                                                                                                                                                                                                                                                                                                                              |                     |             |
| <b>Why it matters:</b><br>Without context, staff may not understand the importance of protocols like Acknowledgement of Country. Training creates space for connection and understanding.     | <b>How to improve:</b><br>Consider taking up free training: <ul style="list-style-type: none"> <li>♥ <a href="#">See Me, See You Cultural Competency Training from Multicultural Futures</a></li> <li>♥ <a href="#">Acknowledge This! Training</a> on developing Acknowledgements of Country.</li> </ul>                                                     |                     |             |
| <b>Avoid celebrating unsafe holidays? (E.g., Australia Day)</b>                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                              |                     |             |
| <b>Why it matters:</b><br>For many First Nations people, Australia Day represents invasion and loss. Celebrating it can undermine trust and connection.                                       | <b>How to improve:</b> <ul style="list-style-type: none"> <li>♥ Allow staff to substitute leave</li> <li>♥ Avoid celebrating the day. <a href="#">Learn more at Creative Spirits.</a></li> </ul>                                                                                                                                                             |                     |             |
| <b>Have authentic connections with the local First Nations community?</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                              |                     |             |
| <b>Why it matters:</b><br>Relationships are at the heart of First Nations culture. Many people feel deep distrust of institutions due to historic harms—genuine connection can rebuild trust. | <b>How to improve:</b> <ul style="list-style-type: none"> <li>♥ Use the <a href="#">Aboriginal Business Directory WA</a> to reach out to your local Aboriginal Owned Corporation for a yarn.</li> <li>♥ Learn about the local language and traditions</li> <li>♥ Consider hosting a community activity (such as a BBQ) to build the relationship.</li> </ul> |                     |             |
| <b>Acknowledge whose Country we are on and express gratitude?</b>                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                              |                     |             |
| <b>Why it matters:</b><br>Connection to Country is central to Aboriginal culture and wellbeing. Acknowledging Country is a key protocol that demonstrates respect.                            | <b>How to improve:</b><br>Have staff participate in the <a href="#">Acknowledge This! workshop</a> to deepen understanding and delivery of Acknowledgements of Country.                                                                                                                                                                                      |                     |             |

## Secondary Indicators

Aboriginal consumers have told us that superficial signals of ally-ship (like displaying a flag or art) are not enough without deeper work on safety, policy, and accountability.

| Do we...                                                                                                                                                        | Never/ No                                                                                                                                                                                                                                                                                                                                                                   | Sometimes/ A little | Always/ Yes |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------|
| <u>Display celebrations of Aboriginal culture (e.g., flags, artwork)?</u>                                                                                       |                                                                                                                                                                                                                                                                                                                                                                             |                     |             |
| <b>Why it matters:</b><br>Visual cues of inclusion signal safety and belonging. But ensure these are backed by meaningful cultural respect.                     | <b>How to improve:</b> <ul style="list-style-type: none"> <li>♥ Purchase from 100% Aboriginal-owned businesses/local artists. See: <a href="#">Art and authenticity   AIATSIS corporate website</a></li> <li>♥ Aboriginal Flags and other items that celebrate Aboriginal Culture can be purchased from <a href="#">this</a> 100% Aboriginal Owned Organisation.</li> </ul> |                     |             |
| <b>Use plain language in our materials?</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                             |                     |             |
| <b>Why it matters:</b><br>Plain language ensures your message is accessible to people with different literacy levels, language backgrounds, or cognitive needs. | <b>How to improve:</b> <ul style="list-style-type: none"> <li>♥ Refer to <a href="#">Translators Without Borders' Plain Language Guide</a></li> <li>♥ Try using plain language AI tools (with care for data privacy.)</li> </ul>                                                                                                                                            |                     |             |
| <b>Use images that represent diversity?</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                             |                     |             |
| <b>Why it matters:</b><br>Representation signals that people from all backgrounds are welcome and valued.                                                       | <b>How to improve:</b> <ul style="list-style-type: none"> <li>♥ Ensure visual materials reflect your audience and community.</li> <li>♥ Use real photos, not stock images when possible.</li> <li>♥ Collaborate with local creatives.</li> </ul>                                                                                                                            |                     |             |

## Final Reflection

Recognising and celebrating diversity benefits everyone. Review your answers. Where could your organisation do better? What practical steps can you take today?

### First Nations consumers have told us they expect:

- That workers have done the inner work—examined their privilege and understood the impacts of colonisation.
- That there is a genuine respect for and valuing of Aboriginal culture.
- That organisations are actively dismantling systems of oppression, not just passively including people.

For co-design facilitators, we recommend the **Cultural Competence Self-Assessment** developed by **Bushready** (Northern Territory Government)

**Note:** One section refers to “White” people—consider replacing with “Non-Indigenous” to shift the focus from colour to culture.

## Co-Design Evaluation Methods

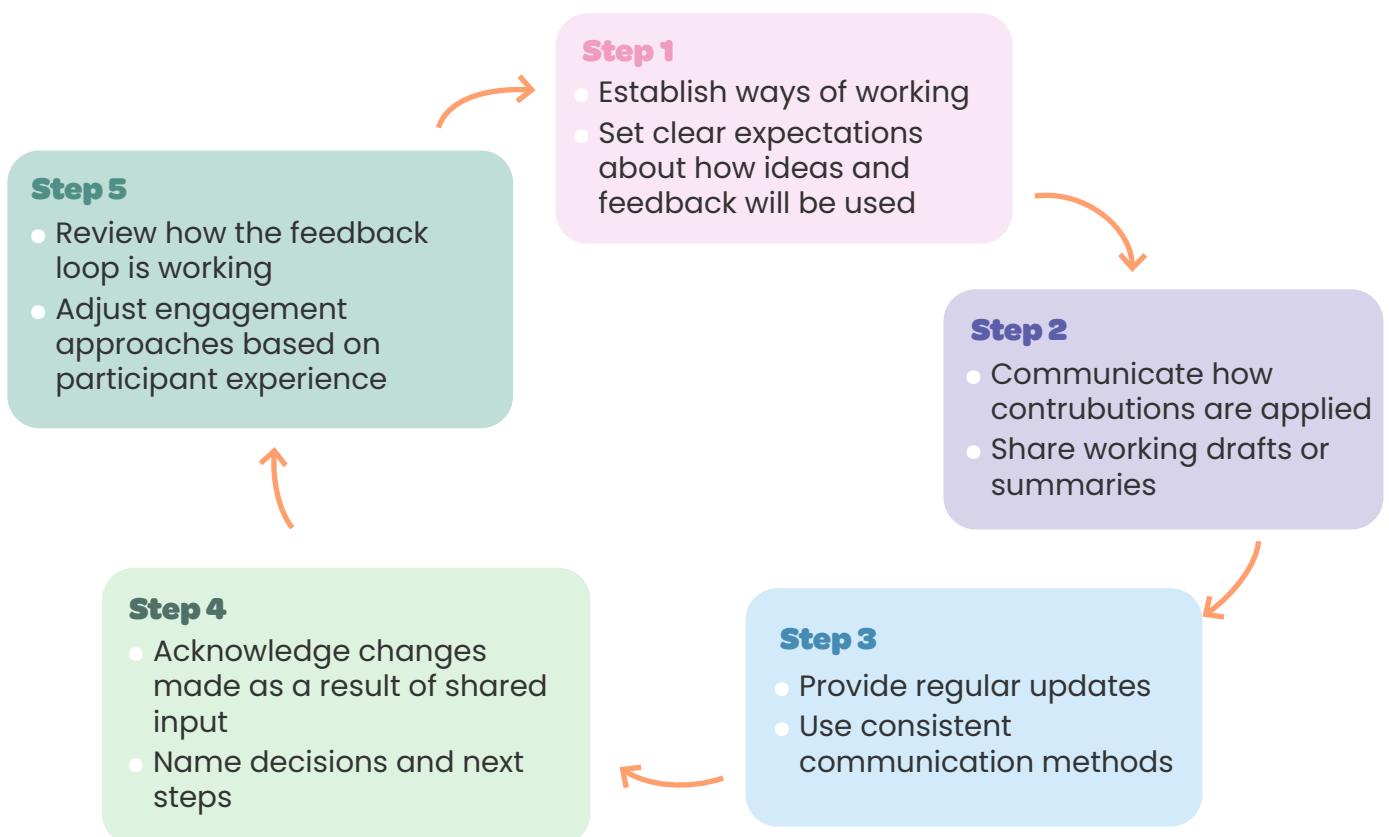
This tool helps organisations evaluate the co-design process itself, not just the outcomes. It supports reflection on inclusion, power-sharing, safety, and impact, ensuring evaluation aligns with co-design principles. Designed for flexibility, it centres lived experience and guides improvements in practice and culture.

| WHO                            | WHAT IS BEING EVALUATED                                                                                                                                                                                                             | METHODS                                                                                                                                                                                                                                                          | EXAMPLES                                                                                                                                                                                                                                                                                                       |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Participants</b>            | <ul style="list-style-type: none"> <li>Whether they felt heard, included and safe.</li> <li>Whether the process was authentically co-designed.</li> <li>Emotional and relational experience.</li> </ul>                             | <ul style="list-style-type: none"> <li>Post-session surveys (Likert scale + open questions).</li> <li>End of project reflections.</li> <li>Verbal check-out rounds.</li> <li>Anonymous drop-in feedback (forms, live docs).</li> <li>Exit interviews.</li> </ul> | <ul style="list-style-type: none"> <li>Did you feel like your voice was heard today?</li> <li>Would you call this process co-design?</li> <li>How engaging was today's session?</li> <li>Did the facilitator create a safe and inclusive environment?</li> <li>Was power shared in today's session?</li> </ul> |
| <b>Facilitators/ Staff</b>     | <ul style="list-style-type: none"> <li>Ability to share power.</li> <li>Reflexivity and responsiveness.</li> <li>Emotional labour and wellbeing.</li> <li>Whether the co-design activities were accessible and engaging.</li> </ul> | <ul style="list-style-type: none"> <li>Facilitator reflection logs.</li> <li>Debrief check-lists.</li> <li>Team debriefs.</li> <li>Wellbeing check-ins.</li> <li>Peer supervision.</li> </ul>                                                                    | <ul style="list-style-type: none"> <li>What am I noticing about group dynamics?</li> <li>Where did facilitation feel most shared?</li> <li>How am I showing up in this process?</li> <li>What challenges or tensions arose today?</li> </ul>                                                                   |
| <b>Co-Design Process (all)</b> | <ul style="list-style-type: none"> <li>Integrity of the co-design approach.</li> <li>Inclusivity across stages.</li> <li>Clarity, transparency, flexibility.</li> <li>Whether the co-design insights led to impact.</li> </ul>      | <ul style="list-style-type: none"> <li>Process mapping.</li> <li>Feedback analysis.</li> <li>Process reporting (monthly, quarterly, annually).</li> </ul>                                                                                                        | <ul style="list-style-type: none"> <li>Were decisions made transparently?</li> <li>Did we adapt when needs changes?</li> <li>Was participant input accurately reflected in final outcomes?</li> </ul>                                                                                                          |
| <b>Organisation</b>            | <ul style="list-style-type: none"> <li>Readiness and openness to co-design.</li> <li>Support for inclusive practices.</li> <li>Follow-through on co-designed actions.</li> </ul>                                                    | <ul style="list-style-type: none"> <li>Staff surveys.</li> <li>Outcome tracking.</li> <li>Cultural readiness assessments.</li> <li>Risks assessments.</li> </ul>                                                                                                 | <ul style="list-style-type: none"> <li>What shifts in thinking or language occurred?</li> <li>How is co-design embedded now?</li> <li>What internal barriers were revealed?</li> </ul>                                                                                                                         |

# Feedback Loop Checklist

Outlines the key steps of a feedback loop in co-design. Use this checklist to ensure feedback is collected, responded to, and embedded.

| Construct            | Example                                                                                                                                                                                                                                                                                          | ✓                        |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| <b>Accessibility</b> | <ul style="list-style-type: none"> <li>○ Having multiple ways to share ideas, reflections and questions.</li> <li>○ Inviting ongoing contributions between sessions.</li> <li>○ Using live or working documents so participants can see how ideas are being developed after sessions.</li> </ul> | <input type="checkbox"/> |
| <b>Regularity</b>    | <ul style="list-style-type: none"> <li>○ Providing regularly updates at key project points.</li> <li>○ Scheduling consistent check-ins to share progress and emerging decisions.</li> <li>○ Using newsletters or update summaries.</li> </ul>                                                    | <input type="checkbox"/> |
| <b>Understanding</b> | <ul style="list-style-type: none"> <li>○ Clearly showing how ideas, feedback and lived experience insights have influences decisions and outputs.</li> </ul>                                                                                                                                     | <input type="checkbox"/> |
| <b>Review</b>        | <ul style="list-style-type: none"> <li>○ Regularly reveiwing whether feedback pathways are working for participants.</li> <li>○ Checking in verbally or through short surveys.</li> </ul>                                                                                                        | <input type="checkbox"/> |



# Participant Feedback Template

Templates and tips for collecting feedback from co-design participants. Includes guidance on timing, methods, and integrating insights.

## We recommend collecting feedback:

**After each session** – to improve facilitation, logistics, and participant experience in real time.

**At the end of the project** – to reflect on overall impact, outcomes, and areas for growth.

## After Each Session: Feedback Survey Template

**Format:** A combination of Likert scale questions and open-ended responses.

### Survey Questions:

#### 1. Relevance of Content

*The session content felt relevant to the meeting objectives.*

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

#### 2. Clarity of Objectives

*The goals of the session were clearly defined and met.*

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

#### 3. Facilitation Quality

*The facilitators were knowledgeable and engaged participants effectively.*

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

#### 4. Participation Encouragement

*I felt encouraged to participate and share my perspectives.*

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

#### 5. Learnings

*I gained new knowledge or insights from this session.*

☐ Strongly Disagree   ☐ Disagree   ☐ Neutral   ☐ Agree   ☐ Strongly Agree

#### 6. Open-Ended Questions:

- What aspects of the session did you find most enjoyable?
- Do you have any additional comments or suggestions?
- What areas of the co-design session could be improved?



## After Co-Design Completion: Feedback Survey Template

**Format:** A combination of Likert scale questions and open-ended responses.

### Survey Questions:

#### 1. Overall Satisfaction

*I am satisfied with my experience participating in this co-design project.*

☐ Strongly Disagree    ☐ Disagree    ☐ Neutral    ☐ Agree    ☐ Strongly Agree

#### 2. Personal Impact

*My contributions were valued and influenced the project outcomes.*

☐ Strongly Disagree    ☐ Disagree    ☐ Neutral    ☐ Agree    ☐ Strongly Agree

#### 3. Learning and Growth

*I gained knowledge, skills, or confidence that I can use in future contexts.*

☐ Strongly Disagree    ☐ Disagree    ☐ Neutral    ☐ Agree    ☐ Strongly Agree

#### 4. Open-Ended Questions

- What was the most valuable part of your experience?
- What would you change or suggest for future co-design projects?
- How would you describe your overall experience in one or two sentences?
- In what method/style do you prefer to give feedback?

## Closing the Feedback Loop

### Always let participants know:

- How their feedback has been used to improve the experience or influence the outcomes.
- Where constraints exist (e.g. budget, policy) that may have limited changes.
- That their contributions are valued, respected, and acknowledged — even if not all suggestions can be acted upon.

This can be done through a follow-up summary, an email update, or a short verbal debrief at the end of a session.

# Adaptive Co-Design Planning Guide

Offers strategies to adapt your co-design process when resources or time are limited, without compromising authenticity.

## Designing in Cycles

Plan → Test → Reflect → Adjust

This flexible cycle helps you deliver meaningful co-design outcomes even when time, resources, or engagement are limited. It's especially useful when you need to move quickly or build incrementally.

### Plan

Decide what you're trying to explore or improve and design a simple activity to start the conversation. The plan doesn't need to be perfect, just clear enough to try.

#### Examples:

- Run a short session to explore language used in service brochures.
- Co-create a draft idea with 2–3 people instead of a full group.

### Test

Try out the idea or draft with participants. This might be a prototype, a process, a script, or even a set of questions. Keep the activity simple and low-risk.

#### Examples:

- Ask participants to react to a draft letter or visual.
- Trial a proposed workshop format with a small group.

### Reflect

Invite feedback and reactions. Use simple tools (like green/yellow/red dots, group discussion, or anonymous forms) to understand what worked, what didn't, and what people felt.

#### Examples:

- Traffic light system: *"What felt good (green), unclear (yellow), or uncomfortable (red)?"*.
- Group prompts: *"What would improve this?"* or *"Does this reflect your experience?"*

### Adjust

Use the feedback to make changes either revising what you've created or designing the next step. You might go back through the cycle again with another group or version.

#### Examples:

- Co-write the final version with 2–3 participants.
- Design the next session based on what people ask for.

## If You Need to Adapt Mid-Process

Things change, people leave, priorities shift, or insights reshape your direction. Being transparent and collaborative when adapting the plan is key.

### ♥ Name the Shift

Let the group know *why* the plan is changing. Be honest and open to maintain trust.

### ♥ Bring People Into the Replanning

**Ask participants:** *“What do you think we should keep, change, or pause?”*

Involve them in adjusting the process, not just reacting to it.

### ♥ Revisit the Goals Together

Check if the original goals still feel relevant. If not, co-define new ones with participants.

### ♥ Map What’s Still Co-Designable

Clarify what parts can still be shaped, and where limits now exist. This helps manage expectations.

### ♥ Use the Plan → Test → Reflect → Adjust model

When in doubt, shrink the process into a small cycle — keep momentum without overhauling everything.

### ♥ Capture the Journey

Document what changed and why. This supports learning, reflection, and future planning.

## Quick Tips

### If Participants Are Disengaging

- Add emotional preparation into agendas
- Offer low-pressure, informal check-ins
- Stagger options for how and when people participate

### If the Planning Feels Unclear

- Use plain language in agendas and communication
- Introduce visual tools or simple diagrams to explain the process
- Include emotional or cognitive preparation activities at the start

### If Feedback Feels Uncomfortable or Unclear

- Offer multiple feedback formats (verbal, written, anonymous, visual)
- Ask the group: *“What would make this feel better?”*
- Be transparent about what feedback can and can’t be implemented

### If You’re Working Within Fixed Structures

- Revisit the Terms of Reference and build in review points
- Clearly name any non-negotiables (e.g. funder or governance constraints)

# Recruiting Participants for Co-Design

A guide to engaging with prospective participants for a co-design project and how to best assess their suitability for projects.

As an organisation leading a co-design project, your role is to ensure that participants feel safe, supported, and able to engage meaningfully in the process. This helps create a positive experience for both the individual and the project.

By carefully assessing EOIs to ensure that facilitators can build a co-design group that is inclusive, effective, and supportive of all participants.

## Key Considerations for Assessing Expressions of Interests (EOIs)

### Interest & Alignment

- Does the person's lived experience align with the project's focus?
- What motivates them to be part of this co-design process?

### Capacity to Engage

- Are they comfortable participating in discussions and activities?
- Do they have the time and availability to commit to the project?

### Support & Accessibility Needs

- Do they require any adjustments, accommodations, or additional support?
- Are financial or practical barriers (e.g., transport, technology access) addressed?

### Emotional Readiness & Safety

- Will the topics discussed be emotionally safe for them to engage with?
- Do they have the necessary supports in place if needed?

### Group Dynamics & Collaboration

- Are they comfortable sharing their insights in a group setting?
- Do they value diverse perspectives and constructive dialogue.

## Making the Process Inclusive & Transparent

To foster an inclusive and transparent process, provide clear information on participation expectations, including time commitments, honorariums, reimbursements, and any available support. A welcoming and supportive approach ensures meaningful engagement for all involved.

| Questioning                             | Example                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Interest and Availability</b>        | <ul style="list-style-type: none"><li>• What interests you most about contributing to this project?</li><li>• Have you participated in similar advisory groups or co-design projects before? Can you tell me a bit about that experience?</li><li>• The commitment involves (meeting frequency, duration, expectations). Would this be manageable for you?</li><li>• Do you have any availability constraints that might impact your ability to participate?</li></ul> |
| <b>Lived Experience and Perspective</b> | <ul style="list-style-type: none"><li>• Would you be comfortable sharing a little about your lived experience?</li><li>• Are you confident with your personal boundaries when working in a collaborative space?</li><li>• How do you see your lived experience shaping the recommendations or insights you would bring to the group?</li></ul>                                                                                                                         |
| <b>Expectations and Support Needs</b>   | <ul style="list-style-type: none"><li>• What kinds of support, if any, would help you participate fully? (e.g., accessibility needs, emotional support, transport, technology access, etc.)</li></ul>                                                                                                                                                                                                                                                                  |

# Inclusive Recruitment Planning Tool

A planning guide to help organisations design inclusive, accessible, and culturally safe recruitment approaches. Supports teams to identify who to involve and reduce barriers to participation.

## 1. Define the Purpose and Who Needs to Be in the Room

- What is the topic or area of inquiry?
- Who is most impacted by this issue?
- Are there voices missing from our usual networks?

? *Have we included a mix of age, culture, gender, region, disability, and life experience?*

## 2. Plan Outreach Methods That Match Your Audience

- What platforms or networks are accessible to the people we want to reach? (E.g. social media, flyers, peer organisations, local radio, schools, support services)
- Are we partnering with trusted community organisations to reach people?
- Have we asked community leaders for advice on how to promote the opportunity?

? *Would someone unfamiliar with our organisation feel welcomed by our invitation?*

## 3. Prepare Inclusive Materials

- Have we written the Expression of Interest (EOI) or Job Description Form (JDF) in plain language?
- Did we include clear info on:
  - ♥ Payment and reimbursements?
  - ♥ Time commitments and expectations?
  - ♥ Support options available?
- Have we provided multiple ways to apply (e.g. phone call, voice memo, Easy Read version)?

? *Would someone with low literacy, no computer, or anxiety about formal processes still be able to apply?*



#### 4. Plan for Practical and Emotional Access

- Have we asked about access needs before the first meeting?
- Are there flexible options for participating (e.g. online, voice recordings, staggered sessions)?
- Are wellness supports, quiet spaces, or breaks planned in?

? *Are we removing effort barriers — not just physical ones?*

#### 5. Build in Support, Not Surveillance

- Have we named optional supports like peer buddies or debriefs?
- Have we offered people choice in how much they share?
- Are we creating a culture of care from the first interaction?

? *Are we designing for dignity and trust, not compliance or control?*

# An Expression of Interest Template

How to structure an Expression of Interest (EOI) document to advertise a project/position to the community.

## Key Elements of an EOI

### Project Overview

- Provide a brief description of the project, including its purpose, objectives, and intended impact.
- Highlight the role of co-design and explain how participants will influence project outcomes

### Eligibility Criteria

- Clearly state who is encouraged to apply (e.g., people with lived experience, community members, professionals in the field).
- Consider any specific skills, perspectives or experiences that would support the project.

### Roles and Responsibilities

- Outline what participants will do, including time commitment methods of participation (e.g., workshops, online sessions) and expectations.
- Mention the support available (e.g., training, honorariums, accessibility accommodations or flexible scheduling).

### Selection Process

- Describe how applications will be assessed.
- List any key selection criteria, such as relevant experience, motivation to participate, and diversity considerations.

### How to Apply

- Provide step-by-step instructions for submitting an EOI.
- List the information required: name, contact details, relevant experience, and a short statement of interest.
- Specify the application deadline and provide a contact for support or questions.

# Text Only Example: Inclusive Workplace Initiatives EOI

## Project Overview

The **Inclusive Aged Care Initiative** is a co-design project focused on improving inclusion, safety and belonging for LGBTQIA+ and gender diverse older adults in aged care settings.

The project recognises that people with lived experience hold essential knowledge about what inclusive care looks like in practice. Through co-design, we will develop best practice guidelines, resources, and training to support organisations to create more inclusive aged care environments.

## Who Can Apply?

We invite expressions of interest from people who bring relevant experience, insight or perspective and who are interested in working collaboratively in a co-design process.

### This may include:

- People with lived experience of aged care, including older adults who identify as LGBTQIA+ and/or gender diverse, or people who have supported or cared for someone in an aged care setting.
- Employers, managers of human resource professionals working in aged care who want to strengthen inclusive practice.
- Advocates or representatives from LGBTQIA+/gender diverse communities or support services.
- Researchers or practitioners in aged care, inclusion or gender diversity.

## What's Involved?

### Participants will work together to:

- Share lived experience and insights to identify key challenges and priorities.
- Co-design practical tools, resources and training materials that respond to those priorities.

### You will be asked to:

- Attend 4 co-design workshops (each 2-3 hours) over a three month period.
- Contribute to discussions, activities and shared reflection during workshops.

## Support Provided

- Payment for lived experience contributions at **\$37.50 per hour** within 5 business days of workshop attendance.
- Accessibility support is provided (e.g., closed captions, screen-reader friendly materials, assistance during sessions).
- Flexible participation options (e.g., online, written, or verbal input) are available to meet individual needs.

## How to Apply

Please complete the online form [here](#) or submit a brief email including:

- Your name and contact details
- A short statement about why you are interested in participating.
- Any relevant experience or perspective you bring to the project.

All EOIs must be submitted by [Insert Date]. For more information, please contact [Name, Email & Phone].

## Assessing an EOI

How to assess an Expression of Interest (EOI) to ensure selected participants align with the project's objectives and contribute meaningfully to the co-design process.

### Key Assessment Criteria

| Relevance to the Project                                                                              |  |
|-------------------------------------------------------------------------------------------------------|--|
| Does the applicant's background, experience, or perspective align with the project goals?             |  |
| Do they demonstrate an understanding of co-design principles and workplace inclusivity (if relevant)? |  |
| Lived Experience or Professional Expertise                                                            |  |
| Does the applicant have direct lived experience relevant to the project's focus?                      |  |
| If applying as a professional, do they have relevant skills or expertise in the field?                |  |
| Commitment and Availability                                                                           |  |
| Has the applicant expressed a willingness to engage in the required workshops and activities?         |  |
| Do they have availability that aligns with the project timeline?                                      |  |
| Diversity and Representation                                                                          |  |
| Does the applicant bring a unique or under-represented perspective to the group?                      |  |
| Is there a balance of voices to ensure a well-rounded co-design process?                              |  |
| Communication and Collaboration Skills                                                                |  |
| Has the applicant demonstrated an ability to collaborate respectfully with others?                    |  |
| Do they have experience contributing to group discussions or community projects?                      |  |

# EOI Assessment Template

Applicant Name: .....

Date Assessed: ...../...../.....

Organisation: .....

Assessor: .....

| Criteria                      | Does not Demonstrate (0) | Partly Demonstrates (1) | Fully Demonstrates (2) | Comments |
|-------------------------------|--------------------------|-------------------------|------------------------|----------|
| E.g. Experience in co-design. |                          |                         |                        |          |
|                               |                          |                         |                        |          |
|                               |                          |                         |                        |          |
|                               |                          |                         |                        |          |
|                               |                          |                         |                        |          |

Other assessor comments (optional):

Participant score:

/ 10

Recommendation: Decline / Appoint / Discuss with panel

# Meeting Types

Outlines different types of meetings used in co-design, whether online or in person. Helps teams choose the right meeting structure for the right purpose.

## Online vs In-Person

| Platform  | Why Choose This Style?                                                                                                               | How This Supports Co-Design                                                    |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Online    | Removes travel barriers, making participation easier for those with busy schedules, caring responsibilities, or mobility challenges. | Increases accessibility, allowing people from diverse locations to contribute. |
|           | Offers flexibility and comfort, enabling people to engage from familiar spaces.                                                      | Creates a more inclusive environment where participants feel at ease.          |
|           | Reduces costs related to travel, venue hire, and catering.                                                                           | Ensures resources are allocated to the project rather than logistics.          |
|           | Digital documentation makes it easy to record, transcribe and share discussions.                                                     | Improves transparency and ensures feedback is captured accurately.             |
|           | Structured engagement is enhanced with tools like polls, chat functions, and breakout rooms.                                         | Encourages diverse forms of participation, by increasing accessibility.        |
| In-Person | Non-verbal cues enhance communication, leading to better engagement and focus.                                                       | Allows for deeper discussions and stronger relationship-building.              |
|           | Hands-on activities can be more effective in physical settings.                                                                      | Encourages creative problem-solving and tangible outcomes.                     |
|           | Conversations feel more fluid and natural, helping to build trust among participants.                                                | Supports open dialogue, particularly on sensitive or complex topics.           |
|           | Sensory engagement (e.g., working with materials) fosters creativity.                                                                | Enhances the experience for those who learn best through physical interaction. |



# Group Structures Comparison Table

Compares the roles and purposes of different participatory group types (e.g. reference groups, advisory groups, working groups, working groups). Helps teams choose the right structure.

|                      | Steering Committee                                 | Focus Group                                              | Reference Group                                                        | Advisory Group                                                                      | Co-Design Working Group                                                   | Yarning Circle                                    |
|----------------------|----------------------------------------------------|----------------------------------------------------------|------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------|---------------------------------------------------|
| Primary Purpose      | Oversight, governance, risk, delivery monitoring   | Gather community feedback or opinions on specific topics | Provide input at one or more stages of a specific project              | Provide advice & lived experience insights, guide programs                          | Co-create & implement with equal stakeholder input                        | Sharing stories, experiences, & cultural insights |
| Primary Objective    | Strategic accountability, deliverables, milestones | Reactions, views or testing of concepts or services      | Review & advise on project plans, materials, & help with dissemination | Advise & shape project decisions, often from a lived experience or stakeholder lens | Joint decision-making, design, planning, & implementation                 | Relationship building, community truth-telling    |
| Typical Membership   | Executives, funders, project leads, internal staff | People with relevant lived or professional experience    | Mix of sector experts, policy reps & people with lived experience      | People with diverse lived experience/s, stakeholders + organisation staff           | People with diverse lived experience/s, stakeholders + organisation staff | Elders, community members + organisation staff    |
| Power Level          | High<br>Holds decision-making authority            | Low<br>No decision-making power                          | Low-moderate<br>Advises only                                           | Moderate to high<br>May shape or co-create                                          | High<br>Shared decision-making & co-ownership                             | Moderate to high<br>Relational influence          |
| Engagement Style     | Formal, agenda-led, reporting                      | One-off session(s), structured facilitation              | Structured & periodic over project lifespan                            | Relational & inclusive, ongoing over a program timeline                             | Ongoing collaboration, iterative sessions, co-owned process               | Culturally grounded, informal                     |
| Co-Design Potential  | Not co-design<br>Unless power is shared            | Not co-design<br>Consultative only                       | Low to moderate<br>Limited by influence & structure                    | Moderate<br>Can support co-design with right structures                             | Yes<br>Core co-design method with strong power-sharing                    | Yes<br>Relational & community-led                 |
| Typical Group size   | 5-10                                               | 6-30                                                     | 6-15                                                                   | 6-12                                                                                | 6-12                                                                      | 12-30                                             |
| Length of Engagement | Long-term<br>(12-24+ months)                       | Very short-term<br>(1-3 hours)                           | Medium-term<br>(Stages of a single project)                            | Medium-long term<br>(6-12+ months)                                                  | Medium-long term<br>(Project lifecycle/multiple projects)                 | Medium-long term<br>(Project lifecycle)           |

## Group Types Across the Co-Production Spectrum

Co-Production involves five stages: Co-Discover, Co-Plan, Co-Design, Co-Deliver & Co-Evaluate. This table shows how different group types typically contribute across these stages, based on their role, influence & structure.

|                                                        | Steering Committee                   | Focus Group                            | Reference Group                    | Advisory Group                            | Co-Design Working Group                  | Yarning Circle                          |
|--------------------------------------------------------|--------------------------------------|----------------------------------------|------------------------------------|-------------------------------------------|------------------------------------------|-----------------------------------------|
| <b>Co-Discover</b><br>Identify issues, needs, insights | Sometimes High-level data review     | Strong Gather insights or experiences  | Input on issues & context          | Ongoing insight & lived input             | Discover needs collaboratively           | Story & relationship-based discovery    |
| <b>Co-Plan</b><br>Shape strategy, scope, goals         | Strategic planning & oversight       | No influence over planning             | Can provide review or suggestions  | May shape direction & planning            | Plan scope, priorities with stakeholders | May inform culturally grounded planning |
| <b>Co-Design</b><br>Create tools, solutions, content   | Typically, not creators of solutions | Feedback only, not design              | Not involved in design creation    | Can co-create depending on structure      | Actively co-create solutions or outputs  | Community-led input into design         |
| <b>Co-Deliver</b><br>Implement & facilitate            | Approve or oversee delivery          | Not appropriate for delivery           | Not appropriate for delivery       | Rarely May consult on delivery            | May assist with facilitation or delivery | Informal contribution to delivery       |
| <b>Co-Evaluate</b><br>Review outcomes, refine          | Oversee evaluation reporting         | Sometimes – Reflections on service use | Can review outputs & give feedback | Can participate in evaluation discussions | Jointly evaluate & refine                | Reflective, collective evaluation       |

## Co-Design Legacy Tracker

A tool to help you track the ongoing impact of co-design activities over time. Useful for organisational learning and accountability.

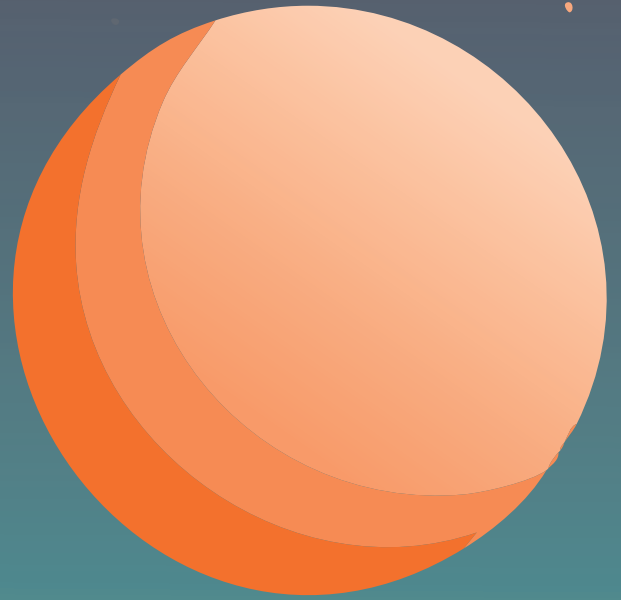
[illegible]

## Celebration and Closure Checklist

Ideas and prompts to meaningfully close out your co-design process.  
Supports recognition, reflection, and transition.

Community members will remember how they were treated – ensure you continue building relationships after co-design is completed.

- ☐ **Co-create a post-design communication plan**  
Work with the group to decide how often updates will be sent and the best method (e.g. email, text, phone call).
- ☐ **Provide clear contact details**  
Share the name and contact information of the person participants can reach out to with follow-up questions.
- ☐ **Offer certificates or letters of appreciation**  
Acknowledge participants' contributions formally with a certificate or thank-you letter.
- ☐ **Acknowledge contributors publicly (with consent)**  
Include names of co-designers on service materials, websites, or publications as appropriate.
- ☐ **Provide endorsements or references**  
Where appropriate, offer testimonials or job references to support participants in future opportunities.
- ☐ **Celebrate the journey**  
Host a wrap-up or celebration event, and provide space to reflect on or process any feelings about the co-design phase ending.
- ☐ **Include participants in future stages**  
Invite co-designers to be part of launch events, speaking engagements, or follow-up project phases.
- ☐ **Ensure fair attribution if work is monetised**  
If the co-designed product or service generates income, ensure credit and value are shared transparently.
- ☐ **Invite participants into new roles**  
Offer opportunities for co-designers to return as mentors, advisors, or facilitators in future projects.



# **Working with Lived Experience**

*ff*



# How to Write a Recognition of Lived Experience

A guide to help organisations write meaningful recognition for people with lived experience. Includes examples and prompts to ensure acknowledgements are genuine, strengths-based, and culturally respectful.



## 1. Acknowledge the Significance of Lived Experience

Begin by clearly stating that lived experience is valuable, legitimate, and central to understanding the issue/s or topic/s at hand (be that mental health, trauma, social injustice, recovery, etc.).

**Example:** *"We honour the voices of those who have experienced significant mental distress, and their meaningful contributions to not just this project but wider mental health reform."*



## 2. Be Respectful and Empowering

Avoid language that frames individuals as victims (see our *Safe Language Guide*) instead choosing language that resonates with the people in the relevant lived experience space. Highlight strength, insight, and the contributions of those with lived experience. Also acknowledge those who have not had the opportunity to have their voices heard.

**Example:** *"To all who have walked these paths, your courage informs and transforms how we move forward together. We also recognise those left behind by the system, and those still experiencing hardship."*



## 3. Centre Their Role in Driving Change

Emphasise how lived experience leads to real-world impact, policy shifts, improved services, or community healing.

**Example:** *"The insight and advocacy of those with lived experience have led to meaningful change and continue to light the way toward a more just and compassionate world."*



## 4. Make it Personal (If Appropriate)

If you or your organisation has been directly influenced by these experiences, share that. Personal connections foster authenticity and connection.

**Example:** *"As someone who has been personally moved by the insights of people with lived experience, I know this work would not be possible without your truth and resilience."*



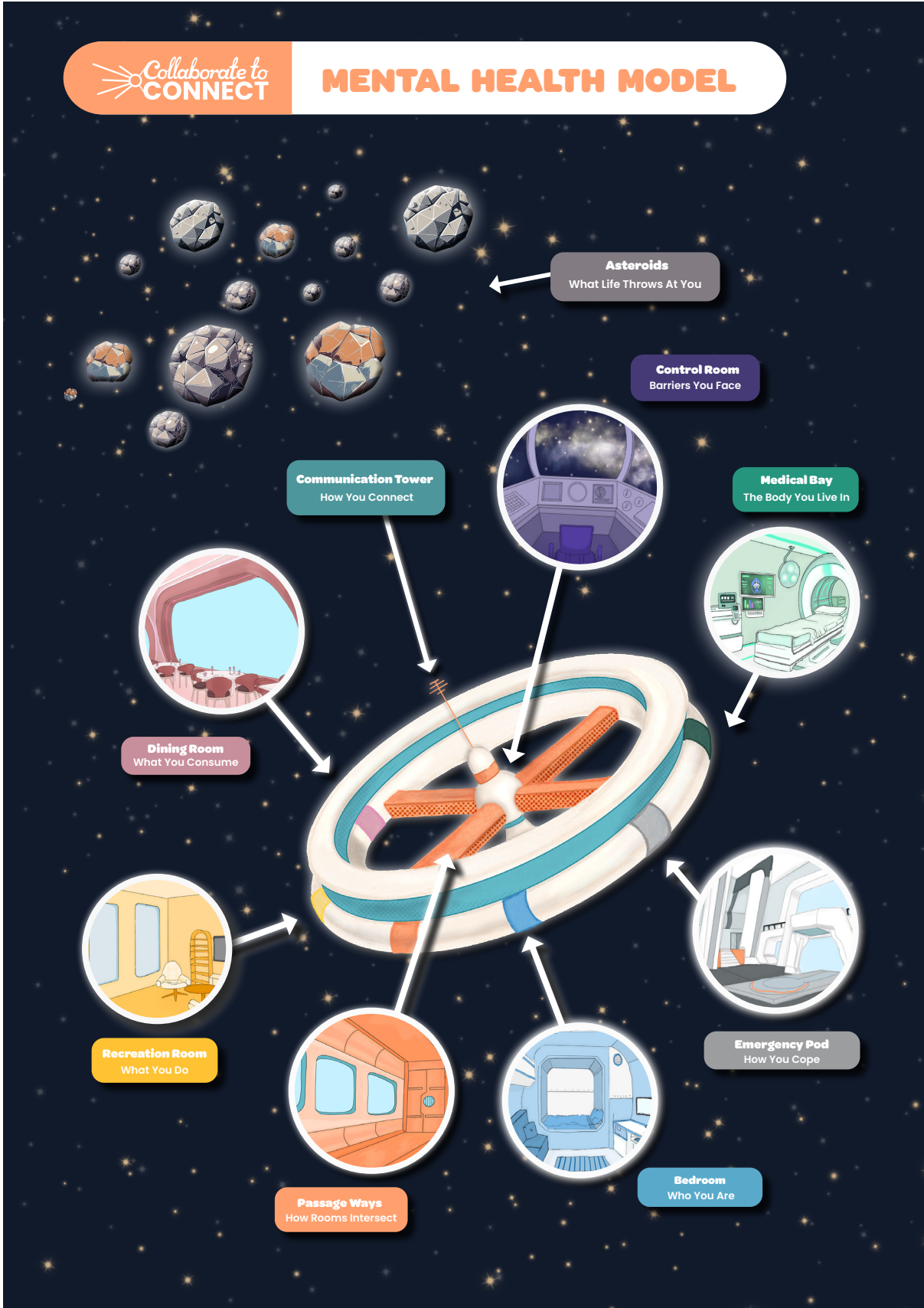
## 5. Ensure Ongoing Commitment

Recognition shouldn't be a one-off gesture. If this is part of a project, policy, or organisation, **reinforce your ongoing dedication** to listening to, involving, and valuing people with lived experience.

**Example:** *"This is not just a moment of recognition, but a commitment to partnership, inclusion, and justice for today and the long road ahead."*



# Mental Health Model



# Mental Health Model Guide



## MENTAL HEALTH MODEL GUIDE

This model was created as an inclusive, non-linear alternative to traditional mental health models. It moves away from stigmatising or overly clinical frameworks and reflects lived experience perspectives, cultural diversity, and systemic context.

### ROOMS

#### INTERNAL EXPERIENCE & DAILY LIFE

##### Bedroom Who You Are

Represents your **identity, culture, personal history, spirituality**, and **internal sense of self**. This room honours that mental health is shaped by who we are, not just what we feel.

##### Emergency Pod How You Cope

Reflects **personal safety mechanisms, crisis responses**, and what **strategies** we use to **repair and recover**. This room respects the validity of all coping styles, even those that are misunderstood or judged.

##### Medical Bay The Body You Live In

Acknowledges the **connection between mental and physical health**. Includes experiences of **disability, neurodivergence, medication effects**, and how the body is **read and treated by others**.

##### Dining Room What You Consume

Encompasses **everything you take in: food, media, information, substances**, and **narratives**. Recognises how culture, class, and access shape what and how you consume.

##### Recreation Room What You Do

Focuses on **meaningful activity: work, rest, creativity**, and **structure**. This room honours that purpose and routine support wellbeing in diverse, individualised ways.

### FUNCTIONAL HUBS

#### INTERPRETATION & INTERACTION

##### Control Room Barriers You Face

Represents both **internalised experiences** (like **trauma and stigma**) and **external challenges** (like **discrimination and housing insecurity**). It reframes “barriers” as consequences of social and structural inequality, not personal failure.

##### Communication Tower How You Connect

Reflects **relationships, communication styles, cultural norms, community belonging, and connection needs**. Recognises how social connection can both support and strain mental health.

##### Passage Ways How Rooms Intersect

A key feature of the model — **rooms don't operate in isolation**. These paths show the complex, fluid movement between parts of life. The passageways reflect **intersectionality** by the way **identity, culture, trauma, relationships** and **systems overlap** to shape your experience of mental health.

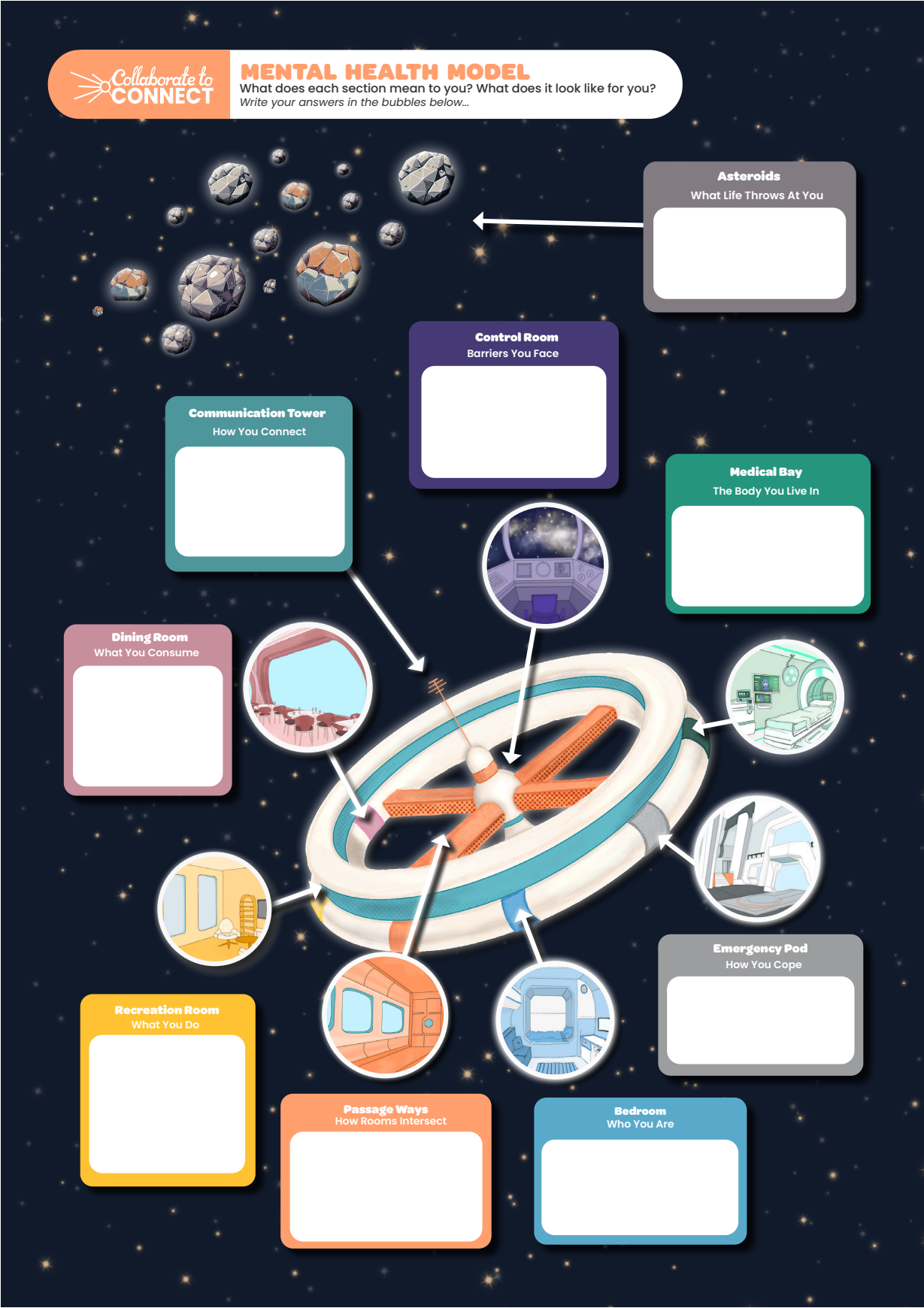
##### Asteroids What Life Throws At You

**Unexpected life events: grief, injustice, job loss, family crisis, natural disasters, or state violence**. These stressors are often out of your control and shaped by where you sit in the world. Asteroids remind us that **mental health is also political, economic, and collective**.

# Mental Health Model Worksheet



**MENTAL HEALTH MODEL**  
What does each section mean to you? What does it look like for you?  
Write your answers in the bubbles below...



**Asteroids**  
What Life Throws At You

**Control Room**  
Barriers You Face

**Medical Bay**  
The Body You Live In

**Emergency Pod**  
How You Cope

**Bedroom**  
Who You Are

**Passage Ways**  
How Rooms Intersect

**Recreation Room**  
What You Do

**Dining Room**  
What You Consume

**Communication Tower**  
How You Connect

**SCENARIO 1**

Your space station is functioning well, travelling on-time and all systems are go!

(Think about a time when things felt stable or positive — maybe you reached a personal or professional goal, or felt connected and in control.)

**How do the rooms function/reflect this?**

**What strategies/supports help maintain your space station?**

**What rooms require extra attention to help you prepare for more challenging moments?**

**SCENARIO 2**

You've hit an asteroid belt and its now bumpy ride to navigate.

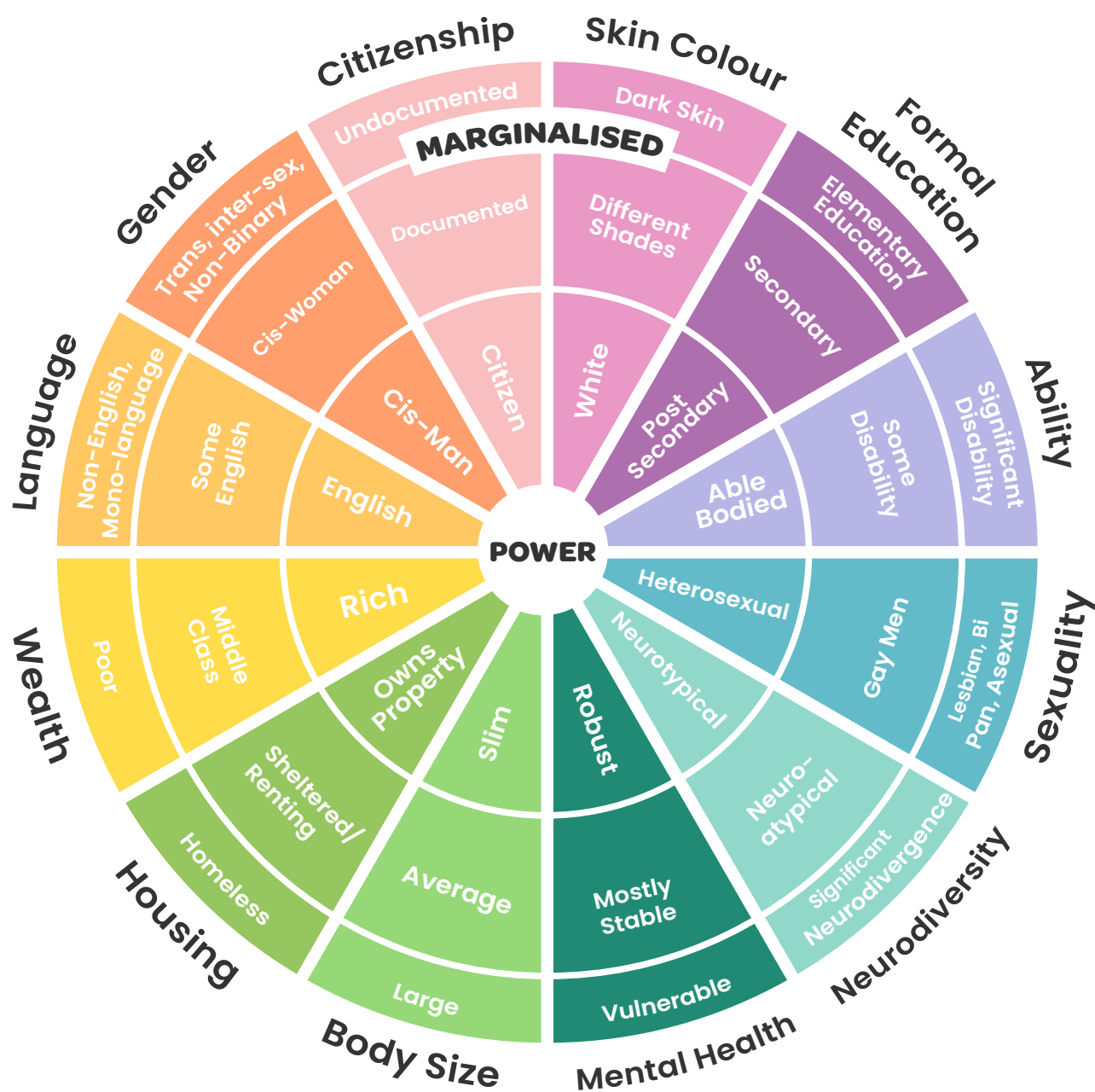
(Think about a time when life felt uncertain or overwhelming — routines were disrupted, or your usual coping tools didn't feel as effective.)

**Which room(s) are impacted when navigating asteroids?**

**How does this impact the rest of your space station? Does your space station have conditions that make it more vulnerable to external harm?**

**Are there any rooms that could offer support or strategies when navigating asteroids?**

# Power and Privilege Wheel



Based on Slyvia Duckworth's Power and Privilege Wheel

# Mitigating Power and Privilege Disparities

A simple guide with tips for organisations to reduce power imbalances and build trust across all stages of co-design.



## BEFORE Co-Design

- Plan a warm and genuine welcome for participants.
- Dress casually. Avoid uniforms or anything that may signal hierarchy.
- Use clear and accessible language. Avoid acronyms and jargon.
- Invite diversity. Include a mix of lived and experiences.
- Offer flexible ways to participate (online, in-person, written, phone).
- Start relationship building earlier, using culturally preferred methods (consider the community you wish to connect with).
- Consider doing staff reflection activities on power, privilege and bias before facilitating.



## DURING Co-Design

- Treat all expertise equally. Lived and professional insights matter.
- Ensure staff understand and practice active listening.
- Involve people with lived experience in facilitations or co-chairing (when possible).
- Be transparent by naming power in the room.
- Explain and discuss exactly how feedback will be gathered and used.



## AFTER Co-Design

- Celebrate everyone's contributions, include everyone who supported the project, not just the organisational project team.
- Aim to design for sustainability so change lasts beyond the project.
- Keep participants informed about the project's impact.
- Maintain relationships with participants and offer channels for ongoing dialogue.



# Plain Language Guide

A quick guide on writing in plain language. Includes key principles and examples to make communication clearer.

## Why Plain Language Matters

- **Enhances Accessibility:** People with lived experience may have varying levels of literacy, cognitive capacity, or mental fatigue. Plain language removes barriers and makes information easier to understand and engage with.
- **Promotes Inclusion:** Complex jargon, technical terms, or bureaucratic language can alienate participants. Using straightforward, everyday language ensures everyone can contribute meaningfully.
- **Supports Effective Engagement:** When information is clear, individuals can confidently share their perspectives and participate in decision-making. This leads to more authentic and representative co-design outcomes.
- **Builds Trust and Transparency:** Clear communication demonstrates respect for participants and their experiences, fostering a culture of openness and shared understanding.

## Best Practices for Using Plain Language

- Use everyday words instead of technical or complex terms.  
*Example:* Instead of “utilise,” say “use.” Instead of “facilitate,” say “help.”
- Keep sentences and paragraphs short and to the point.  
*Example:* Instead of “The committee will convene in order to discuss the implementation of strategies to enhance inclusivity,” say “The committee will meet to discuss ways to be more inclusive.”
- Use active voice and direct language.  
*Example:* Instead of “This will be reviewed by the team,” say “the team will review this.”
- Break up information using bullet points, headings, and white space.
- Provide definitions or alternatives for unavoidable technical terms.  
*Example:* “Psychosocial disability means a condition that affects a person’s mental health and ability to engage with daily activities.”
- Use visual aids, such as diagrams or icons, to support understanding.
- Test materials with lived experience participants to ensure clarity.

Plain language is a fundamental tool for ensuring inclusive, equitable, and effective co-design. Organisations committed to meaningful engagement must prioritise accessible communication to empower all participants and create impactful, user-driven solutions.



# Safe Language Guide

Outlines inclusive, respectful language choices for working in co-design. Helps prevent harm and misunderstanding.



## Why Safe Language Matters

- **Reduces Harm and Triggers:** People with lived experience may have trauma histories or sensitivities to certain words. Safe language helps prevent distress and ensures a supportive environment.
- **Promotes Inclusion:** Stigmatising or judgemental language can alienate participants. Using neutral and respectful language ensures everyone feels valued and respected.
- **Supports Effective Engagement:** When people feel safe, they are more likely to contribute openly and meaningfully. This leads to more authentic and representative co-design outcomes.
- **Builds Trust and Transparency :** Thoughtful communication demonstrates respect for participants and their experiences, fostering a culture of openness and shared understanding.

The safest language you could use is the terminology, terms and references that the consumers you're engaging with nominate for themselves or within the context of the group.



## Best Practices for Using Safe Language

It's worthwhile spending time at the beginning of the engagement process with your consumer representatives/consumer advisory groups to establish a shared understanding of language used within the group.

**This could look like:**

1. Asking the group to write their own biography prior to the first consumer advisory meeting.
2. Developing a list of common terms within your field or an example of a biography and having them either critique or give feedback on the list and/or the exemplary biography.

It's always good practice to test materials with lived experience participants to ensure they feel truly representative and inclusive.

The following suggestions are compiled from a variety of resources which are referenced below.

| Thematic Element                                                             | Examples                                                                                                                                                                                                                |
|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Using language, that empowers and reflects people’s lived experience.</b> | <ul style="list-style-type: none"> <li>● Instead of “suffering from a mental illness,” say “living with a mental health condition.”</li> <li>● Instead of “disabled person,” say “person with a disability.”</li> </ul> |
| <b>Avoid labels that reduce a person to their condition.</b>                 | Instead of “They are schizophrenic,” say “They have schizophrenia.”                                                                                                                                                     |
| <b>Be mindful of words that imply blame or weakness.</b>                     | Instead of “failed treatment,” say “treatment was not effective.”                                                                                                                                                       |
| <b>Avoid using overly clinical or technical terms without explanation.</b>   | Instead of “executive dysfunction,” say “difficulty with planning and decision-making.”                                                                                                                                 |
| <b>Provide content warnings for potentially distressing discussions.</b>     | “This session will include discussions about trauma. Please take breaks as needed.”                                                                                                                                     |

Adapted from Everymind(2023).Our words matter Guidelines for language use. Newcastle, Australia.

# A Simple Guide to Pronouns

A short guide that explains why pronouns matter and how to use them respectfully in co-design settings.

## What are pronouns?

Pronouns are words we use to refer to someone or something without repeating their name. Common pronouns include: I, you, we, he, she, they – and many others.

We use pronouns to make sentences smoother and more natural. Repeating someone's name over and over can make a sentence sound clunky.

For example:



### Without pronouns:

*Mark was making a coffee and offered Michele one. Michele said yes to Mark, and Mark ordered Michele one. Then Mark and Michele chatted.*

### With pronouns:

*Mark was making a coffee and offered me one. I said yes to him, and he ordered me one. Then we chatted.*

## Why do pronouns matter?

Using someone's correct pronouns shows respect, inclusion, and kindness. It's a small but important way to affirm someone's identity.

If you're not sure what pronouns someone uses – it's okay to ask politely. And if you make a mistake, simply correct yourself and move on without making it a big deal.

**Learn more about pronouns here:** <https://www.youtube.com/watch?v=3xpvricekxU>

### Gender-Neutral Pronouns:

**They/Them/Theirs** are gender-neutral pronouns.

These pronouns can be used by anyone, and are commonly used by people who identify as non-binary, gender diverse, or gender fluid.

You probably already use gender-neutral pronouns without realising it!

### Gendered Pronouns

**He/Him/His** are pronouns typically used by people who identify as male.

**She/Her/Hers** are pronouns typically used by people who identify as female.

### Gender is not defined by someone's body or genitals.

It's essential not to assume a person's pronouns based on how they look, sound, or present themselves.

# Co-Design Readiness Reflection: For Participants

A self-reflection tool for participants with lived experience to assess their own readiness and supports needed for co-design involvement.

**We share from scars, not wounds:** This means being intentional about what we share, and avoiding re-traumatizing ourselves.

| What am I comfortable talking about? | What am I not comfortable talking about? |
|--------------------------------------|------------------------------------------|
|                                      |                                          |

What are my values? Do they align with this project?

| Value |                          |
|-------|--------------------------|
|       | <input type="checkbox"/> |
|       | <input type="checkbox"/> |
|       | <input type="checkbox"/> |
|       | <input type="checkbox"/> |

## Making a Plan

| How might I...                                                  | Before a meeting                               | In the moment                                               | After a meeting                                       |
|-----------------------------------------------------------------|------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------|
| <b>Ensure I am feeling comfortable and safe to participate?</b> | <i>Example: Bring a fidget</i>                 | <i>Example: Take regular sips of water</i>                  | <i>Example: Debrief with a friend</i>                 |
| <b>Show up and contribute?</b>                                  | <i>Example: Journal to collect my thoughts</i> | <i>Example: Remind myself that my experiences are valid</i> | <i>Example: Email facilitator with other thoughts</i> |
| <b>Respond to someone who disagrees with me?</b>                |                                                | <i>Example: Take a deep breath before speaking</i>          | <i>Example: Talk to facilitator</i>                   |
| <b>Respond if I become distressed?</b>                          |                                                | <i>Example: Ask for a break</i>                             | <i>Example: Call my support person</i>                |

# Engaging in a Co-Design Meeting: For Participants

A plain-language resource to help participants feel confident joining and contributing to co-design discussions.

Co-design meetings thrive on respect and attentiveness. The following are a series of tips to keep in mind to engage in a co-design meeting effectively.

## For Online Meetings

A smooth online meeting experience relies

| Do                                                                                                                                                                                                                                                                                                                                                     | Don't                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>✓ Mute your microphone when not speaking to minimise background noise.</li><li>✓ Use the "Raise Hand" feature (on Zoom/Teams) when you'd like to speak.</li><li>✓ Turn on your camera when/if possible</li><li>✓ Actively participate and listen – try and respond to group questions and discussions.</li></ul> | <ul style="list-style-type: none"><li>✗ Interrupt others while they are speaking</li><li>✗ Ignore the agenda – try to contribute at the appropriate moments for the topic.</li><li>✗ Engage in side conversations (either verbally or via chat) that distract from the discussion.</li></ul> |

## For In-Person Meetings

| Do                                                                                                                                                                                                                                                                                                                                                                         | Don't                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>✓ Come ready to participate – try to ask questions, share ideas and engage in discussion.</li><li>✓ Agree on group conduct by setting expectations for respectful language, communication signals and support options.</li><li>✓ Give others the chance to speak and respect different perspectives and lived experiences.</li></ul> | <ul style="list-style-type: none"><li>✗ Talk over others.</li><li>✗ Leave feeling distressed without seeking support, if something affects you let the facilitators know so they can offer assistance.</li></ul> |





# Designing Accessible Workspaces

Tips and examples for creating physical and digital spaces that are accessible, welcoming, and inclusive.



**Note:** co-occurring medical issues, chronic health issues, and physical disabilities are also common and should be considered when designing workspaces.

Creating a supportive environment is not just a legal or ethical responsibility — it also enhances productivity, well-being, and retention. This guide provides principles and practical recommendations for designing or modifying workspaces to meet diverse cognitive and emotional needs.

## Core Principles of Inclusive Workspace Design

### ★ Sensory Modulation

- **Lighting**
  - Use natural light wherever possible.
  - Provide dimmable lights or desk lamps to give individuals control.
  - Avoid flickering fluorescent lighting.
- **Noise Reduction**
  - Use acoustic panels, carpeting, or soundproof dividers.
  - Offer noise-cancelling headphones
  - Provide quiet zones/spaces.
- **Smell and Air Quality**
  - Avoid strong scents.
  - Use air purifiers and ensure good ventilation.

### ★ Flexibility

- Allow employees to customise their space where possible (e.g., lighting, seating).
- **Offer a mix of work areas:** private spaces, open collaborative zones, and low-stimulation quiet rooms.

### ★ Structure

Use clear signage with simple language and icons.

- Keep layouts consistent and organised to reduce cognitive overload.
- Offer visual schedules and cues where possible.

### ★ Psychological Safety and Wellbeing

- Create non-judgemental environments where mental health is normalised.
- Train staff in mental health first aid and neurodiversity awareness.
- Provide accessible mental health resources.

### ★ Routine

- Use shared calendars, reminders, and visual timetables.
- Make expectations and schedules transparent and consistent.

## Modifying Existing Workspaces on Different Budgets

### \$ Low Budget Options (Under \$1,000)

- Rearrange existing furniture to create quiet corners or zones.
- Add inexpensive acoustic panels or rugs to reduce sound.
- Use desk dividers/acoustic panels for privacy.
- Provide ergonomic furniture and technology.
- Provide pin-boards to allow staff to personalise their space.
- Offer access to clean, modern kitchen facilities.
- Ensure that all dietary requirements are catered for.
- Provide easy access to medical and hygiene supplies.
- Add indoor plants for a calming environment.
- Provide noise-cancelling headphones and desk lamps.
- Offer fidget tools or sensory kits.
- Train staff using free or low-cost online resources (e.g., Neurodiversity Hub).

### \$ Medium Budget (\$1,000–\$10,000)

- Invest in modular furniture to support flexible layouts.
- Improve lighting (install dimmable or daylight bulbs).
- Create a dedicated quiet or sensory room with soft furnishings.
- Offer standing desks or ergonomic chair options.
- Provide air purifiers.
- Install air conditioning.
- Add visual signage and cue systems throughout the space.
- Install ramps and wheelchair accessible desks.

## \$ High Budget (\$10,000+)

- Set up outdoor areas to allow for outdoor working.
- Design to accommodate therapy animals, and emotional support animals.
- Consider offering wellness services like an in-house therapist, chef or masseuse.
- Install full soundproofing or white noise systems.
- Implement smart workspace controls (e.g., lighting, temperature, air quality, scheduling).
- Hire consultants to audit and co-design inclusive environments.
- Conduct staff-wide training and develop neuroinclusive policies.
- Install ramps, wheelchair accessible elevators and desks.
- Renovate to include purpose-built:
  - ⊕ High sensory areas
  - ⊕ Low sensory areas/quiet rooms
  - ⊕ Private offices
  - ⊕ Meeting rooms of varying size
  - ⊕ Nap pods
  - ⊕ Wellbeing/medical room
  - ⊕ Creative work areas (resourced for more creative work)
  - ⊕ Group work areas
  - ⊕ Social areas
  - ⊕ Outdoor areas
  - ⊕ Natural lighting

## Additional Considerations



### Inclusive Co-Design

Involve neurodivergent staff and people with psychosocial disabilities in the design process. Use surveys, focus groups, and feedback loops.



### Technology Support

Offer accessible software, captioning, and digital tools that assist with task management and communication.



### Remote and Hybrid Work

Provide flexibility and support for home workspace adaptations, including funding for ergonomic tools and assistive technology.

---

## References & Resources

British Standards Institution (2022) – PAS 6463: Design for the mind – Neurodiversity and the built environment

<https://www.bsigroup.com>

Australian Human Rights Commission (2014) – Workers with Mental Illness: A Practical Guide for Managers

<https://humanrights.gov.au>

Wong, C. et al. (2021) – “Workplace accommodations and support for employees with mental health disorders.” Occupational Medicine, 71(5), 234–240.

<https://academic.oup.com/occmed>

Neurodiversity Hub – Practical resources for employers and designers

<https://www.neurodiversityhub.org/organisation/>

Autistica – Research and guidance on autism-friendly workplaces

<https://www.autistica.org.uk>

Job Accommodation Network (JAN) – Accommodation ideas by condition

<https://askjan.org/organisation>



# A Guide to Adapting to Office Life: For Participants

Helps participants with lived experience navigate office-based work settings, with tips on what to expect and how to prepare.

Working within an office environment can be both exciting and overwhelming.

If you're someone with a psychosocial disability or identify as neurodivergent, you might experience unique challenges. This guide is here to support you as you adjust to office life in a way that **works for you!**



## Know Your Rights & Needs

### Know Your Rights:

- In Australia there are laws that protect your right to reasonable accommodations in the workplace.
- These might include flexible hours, noise-cancelling headphones, quiet spaces, or alternative communication methods.
- Fairwork provides information on workers rights: [Know your rights and obligations – Fair Work Ombudsman](#)

### Identify Your Needs:

Reflect on what supports help you feel safe, calm, and productive.

**You might want to create a list like:**

- "I focus best with soft lighting and minimal interruptions."
- "I get overwhelmed by strong smells or loud printers."



## Prepare for the Physical Environment

Office environments can vary, but here are some common sensory factors and how to manage them:

**Noise** Noise-cancelling headphones, earplugs, or a white noise app.

**Lighting** Request a desk away from harsh lights or bring a desk lamp.

**Temperature** Bring a personal fan, sweater or blanket for comfort.

**Smells** Keep essential oil roller nearby, sit away from break-rooms.



## Self-Accommodation is OK

- Use visual aids or check-lists to manage tasks.
- Create scripts or templates for common emails and communications.
- Keep a "calm kit" with sensory tools, comfort items, or grounding reminders.



## Ask for Help

- Talk to your manager, HR representative, or a trusted co-worker.
- Ask for a mentor or buddy during the first few weeks.
- Join employee support networks if available (e.g., disability employee resource groups).



## Navigating Social Interactions

### Communication Tips:

- Ask if your team prefers emails, chats, or face-to-face chats.
- It's okay to request written communication to help you process information.

### Understand Office Etiquette (but on your terms):

It's common for small talk, group lunches, or impromptu chats in the kitchen to occur.

#### You can set boundaries:

*"Hey, I'm taking a break right now—can we chat later?"*

*"I'd love to join the next lunch outing when I'm feeling less overwhelmed."*



## Manage Time & Breaks

### Structure Your Day:

- Use timers or calendar apps to break your work into chunks.
- Try the *Pomodoro* technique (25 mins work / 5 mins rest).

### Take Meaningful Breaks:

- Find a quiet space or go for a walk outside.
- Use breaks to self-regulate: Vagus nerve activation exercises, breathe, stim, journal, or listen to music.



## Mental Health Check-Ins

- Make space for regular check-ins:
  - *"How am I feeling today?"*
  - *"What do I need to feel okay?"*
- Reach out to a therapist, peer support group, or mental health professional.
- Use journalling, art, or voice notes to process your day.



## Celebrate Your Wins

- Adaptation isn't about changing who you are, it's about making the environment work with you.
- Celebrate small victories: learning a new system, surviving a meeting, or just showing up.

### Remember:

- Your brain, your rhythm, and your ways of being are valid.
- You bring experience and incredible skills that are highly valued.
- Be patient with yourself, adapting to a new routine or environment often takes time. With the right support, tools, and self-awareness, you can adapt—on your own terms.

# Microsoft Teams Guide

Step-by-step instructions for using Microsoft Teams in online co-design. Designed for participants with varied digital experience.

## How to get started

If you don't already have Microsoft Teams installed, you can download it here: [Download Microsoft Teams Desktop and Mobile Apps | Microsoft Teams](#)

Once downloaded, follow the instructions to install Teams on your computer. You do not need a plan/subscription to download and use Teams.

**Note:** If you have been invited to a meeting, you may be able to join directly through your browser without needing to download the app.

## How to use Teams

If you're a visual learner, you might find this helpful: [How to practice meeting features in Microsoft Teams](#)

### Steps to Set Up Microsoft Teams

1. Once you have downloaded and run the installer, enter your Microsoft email account and select *Next*. If you don't have one, you can create an account by clicking the *Create one!* button.
2. Enter your phone number and verify it.
3. That's it! Teams should now be installed and ready to use on your device.

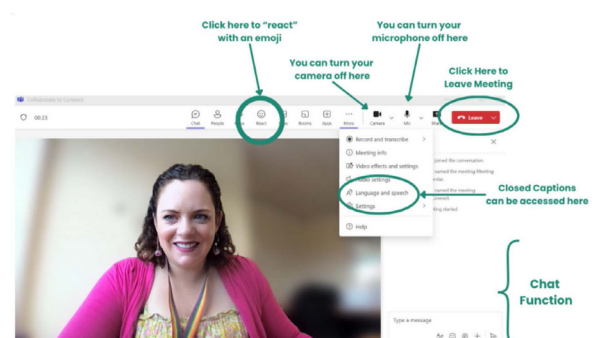
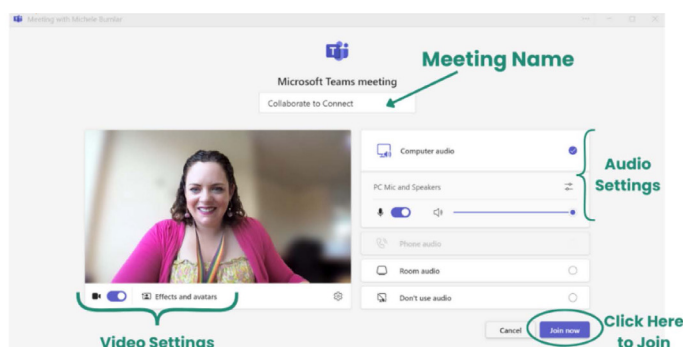
**Note:** You may not need to create an account if you've only been invited to attend a meeting.

### How to Practice Before the Meeting

If you'd like to practice using Teams before attending a meeting, follow these steps:

1. From the left-hand side menu, select *Calendar*.
2. Click *Meet Now* (look for the video icon) at the top right of the menu banner.

This will start a meeting with only you as the attendee. You can check how you appear on screen, test your camera and audio, and make any adjustments (e.g. blurring your background).







# Facilitation

*ff*



# Facilitator Checklist

Covers what facilitators should prepare, do, and reflect on before, during, and after a co-design session.

| Before Facilitation   |  |                                                        |  |
|-----------------------|--|--------------------------------------------------------|--|
| Am I...               |  | Have I...                                              |  |
| Comfortable?          |  | Familiarised myself with people's accessibility needs? |  |
| Prepared?             |  | Familiarised myself with the content?                  |  |
| Ready to share power? |  | Taken care of my own needs?                            |  |
| Calm?                 |  | Checked in with my co-facilitator?                     |  |

| During Facilitation                 |  |                                      |  |
|-------------------------------------|--|--------------------------------------|--|
| Am I...                             |  | Have I...                            |  |
| Calm?                               |  | Monitored my own well-being?         |  |
| Comfortable?                        |  | Taken care of my own needs?          |  |
| Sharing power?                      |  | Checked in with my co-facilitator?   |  |
| Familiar with the group guidelines? |  | Surveyed well-being of participants? |  |

| After Facilitation              |  |                                          |  |
|---------------------------------|--|------------------------------------------|--|
| Am I...                         |  | Have I...                                |  |
| Calm?                           |  | Collected feedback?                      |  |
| Comfortable?                    |  | Checked my energy levels and well-being? |  |
| Ready to partake in reflection? |  | Checked in with my co-facilitator?       |  |
| Ready to partake in self-care?  |  | Debriefed?                               |  |

# Writing a Biography

Below are some guidelines to help you write an effective and inclusive biography.

## Key Elements of an Effective Biography

### Your Name and Role

- Clearly state your name and your role within the organisation.
- **Example:** *"My name is Alex Taylor, and I am a Project Coordinator at CoMHWA."*

### Your Background and Experience

- Share relevant professional or personal experiences that contribute to your work.
- **Example:** *"I have worked in community engagement for over five years, focusing on advocacy and inclusion."*

### Your Interests and Passions

- Mention what drives you in your work or personal interests that you are open to sharing.
- **Example:** *"I am passionate about co-designing solutions with people who have lived experience."*

### Your Identity (If You Wish to Share)

- Identity can be expressed in different ways. Use language that feels right for you.
- **Example:** *"I identify as neurodivergent and bring my lived experience to my work."*
- **Example:** *"I have autism and ADHD, and I am an advocate for accessibility in the workplace."*
- It is completely okay to keep this private – sharing is always optional.

### How You Like to Work and Collaborate

- Let your team know how best to work with you.
- **Example:** *"I work best in a collaborative environment where ideas are shared openly."*
- **Example:** *"I appreciate clear communication and structured timelines in projects."*



## Tips for Writing an Inclusive Biography

- **Use Your Own Voice:** Write in a way that feels natural and comfortable to you.
- **Respect Individual Choices:** Everyone expresses their identity differently; use wording that aligns with how you see yourself.
- **Consider Your Audience:** Think about how your biography will help others understand and connect with you in a team setting.
- **Consider adding a photo of yourself:** (if you are comfortable).

## Example Biographies

***“Hi, I’m Jamie Lee (they/them), a Community Engagement Officer. I have a background in social work and a passion for disability advocacy. As a neurodivergent person, I bring my lived experience into designing accessible programs. Outside of work, I enjoy writing poetry and exploring new cafés.”***

***“My name is Sarah Wong, and I am a Training Facilitator. I have over ten years of experience in mental health education. I live with bipolar disorder and believe strongly in the power of lived experience in shaping meaningful training. I thrive in environments where people share knowledge openly and respectfully.”***

***“I’m Miguel Rodriguez, a Research and Policy Officer. I come from a background in psychology and public policy, with a strong interest in co-design practices. I enjoy structured collaboration and value clear communication.”***

**Practice writing your own biography here:**

# Bias Reflection Tool

A worksheet for facilitators to explore their own biases. Encourages critical self-awareness and inclusive practice.

Imagine you're arriving to facilitate a co-design session, and you're carrying a metaphorical backpack. Inside it are the experiences, values, beliefs, and assumptions you carry into the space – consciously or unconsciously.



Everyone holds bias – the goal is to recognise and manage it.

## ★ Values

What is important to me?

.....

.....

.....

.....

.....

.....

→

How might this value impact my work?

## ★ Experiences

|                     | Previous experience of this | How I could respond, because of that experience |
|---------------------|-----------------------------|-------------------------------------------------|
| Being a leader      |                             |                                                 |
| Working in a group  |                             |                                                 |
| Facing Disagreement |                             |                                                 |



## Assumptions

How am I feeling about the upcoming experience?

.....

.....

.....

.....

.....

.....

How do I assume the group members are feeling about the upcoming experience?

.....

.....

.....

.....

.....

.....

How will I respond if my assumptions are wrong?

.....

.....

.....

.....

.....

.....



## Safe(r) Disclosure for Facilitators

Tips on how to handle personal stories and disclosures during co-design. Supports psychological safety and ethical engagement.

Sharing lived experiences of mental health challenges can foster connection, reduce stigma and inspire hope – **but only when done in a safe and intentional way.**

### Why does this matter?

When stories of lived experience are detailed, unfiltered or emotionally charged, they can unintentionally distress audiences or reinforce negative narratives. While we can't create a completely safe space, we can aim for a safer space by considering:

- **Purpose:** Why are you sharing this? What message do you want to convey?
- **Intention:** What do you want your audience to know or take away?
- **Audience:** Who is listening? How might they respond?
- **Timing:** Is this the right moment to share this story?
- **Language:** Are you using respectful language rather than self-stigmatising or harmful phrasing?

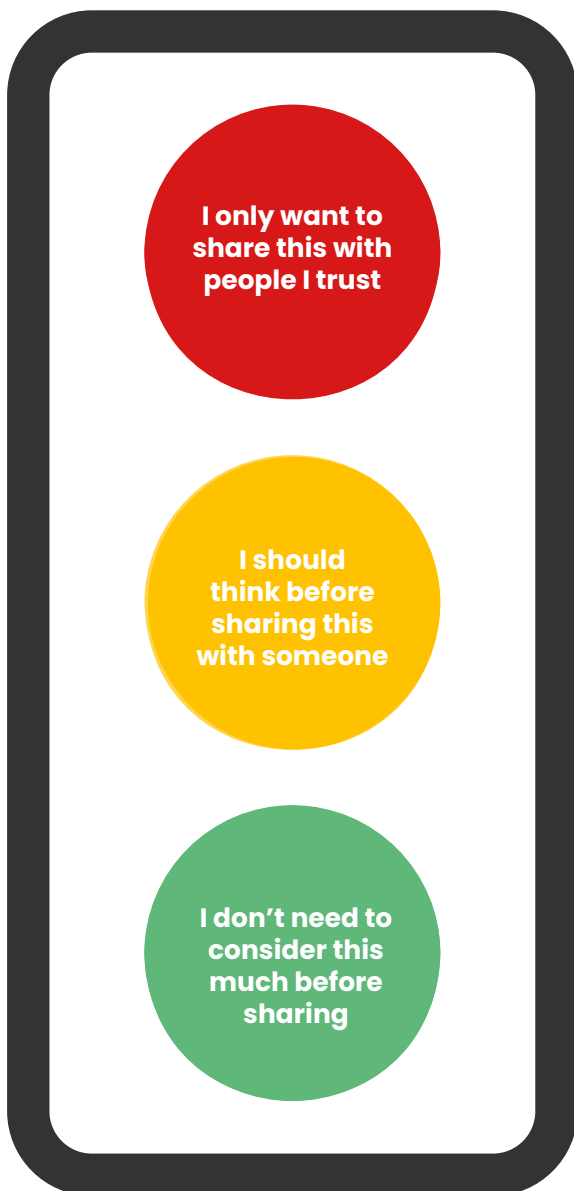
Start by exploring your own story and relationship to it before sharing. The Traffic Light Exercise is a great tool to help identify what is safe to share, what should be adapted, and what may be best kept private.

### How to Share Your Story Safely

| Before You Share – Prepare                  | While You Share – Check In        | After You Share – Reflect                                     |
|---------------------------------------------|-----------------------------------|---------------------------------------------------------------|
| ● How are you feeling?                      | ● How do you feel?                | ● What was the impact of telling your story, on you?          |
| ● Is your audience in a place to hear this? | ● Is your story being understood? | ● What was the impact of telling your story, on the audience? |
| ● What is your intention?                   | ● How are people responding?      | ● Would you tell this story the same way next time?           |

## The Traffic Light Method

Assign each discussion point to either the red, yellow or green category.



### Discussion Points

- My age
- My finances
- My relationship status
- My mental health diagnosis
- My spiritual beliefs
- My former relationships
- My personal achievements
- My political beliefs
- My past trauma
- My goals
- My physical health
- My hobbies

# Creating a Brave Space: A Guide for Facilitators

Explains what it means to create a 'brave space' and how to support meaningful, honest, and safe dialogue.

Together we will create brave space  
Because there is no such thing as a "safe space"  
We exist in the real world  
We all carry scars and we have all caused wounds.  
In this space  
We seek to turn down the volume of the outside world.  
We amplify voices that fight to be heard elsewhere,  
We call each other to more truth and love  
We have the right to start somewhere and continue to grow.  
We have the responsibility to examine what we think we know.  
We will not be perfect.  
It will not always be what we wish it to be  
But  
It will be our brave space together ,  
And  
We will work on it side by side.

By Micky Scottbey Jones

As the poem above examines, creating a safe space is impossible – we do not know what might trigger distress in participants, as everyone's story is unique. We can, however, create a "safe enough" or "brave" space, where rupture and repair can take place and people are encouraged and supported to engage.

## Tips for Creating a Safe Enough or Brave Space for Participants:



### Invite Participants to Share Their Needs in Advance

- Before the event, provide an opportunity for participants to inform you of any specific needs (e.g., pronouns, dietary preferences, accessibility requirements, sensory considerations). This helps you adjust the environment to be as inclusive and as comfortable as possible.



### Name and Hold Space for Vulnerability

- Introduce the concept of “safe enough” or “brave” spaces at the start. You might read Micky Scott Bey Jones’ poem on brave spaces or share a definition that resonates with you.
- Acknowledge tensions or difficult moments openly but with compassion. Ignoring discomfort allows it to grow, whereas addressing it gently can help ease the room.



### Recognise and Address Power Imbalances

- Power dynamics exist in every space. Naming them can help create a more equitable participation.
- Refer to the **‘Collaborate to Connect Power and Privilege Guide’** insights on identifying and managing power imbalances.



### Offer Invitations Instead of Instructions

- Encourage participation rather than directing it.
- Instead of: *“Now we are all going to practice a breathing exercise,”*  
Try: *“I’ll introduce a breathing technique, feel free to join in if it feels right for you.”*  
This allows for autonomy and reduces pressure on participants.



### Build Self-Awareness and Reflect on Your Practice

- Use mindfulness, journalling, or reflective supervision to increase your self-awareness as a facilitator.

A great framework for reflection is *“What? So What? Now What?”*, which helps process experiences and turn them into action. Learn more here: [Simply Psychology Guide](#)



### Plan with Trauma Awareness in Mind

Use this [Trauma Informed Checklist](#) (developed by Mental Health Commissioning Council) to guide your event planning.

# Trauma-Informed Facilitation

A set of easy-to-apply reminders for creating emotionally safe spaces. Helps facilitators work with care and sensitivity.

## Key Understandings for Trauma-Informed Facilitation



Trauma-informed facilitators do their best to avoid re-traumatising participants or blaming them for how they respond to trauma. Their approach is grounded in safety, empathy, and choice.

### What this may look like:

- ☺ Asking participants in advance about potential triggers
- ☺ Providing content warnings before sensitive topics
- ☺ Offering debriefing and peer support options
- ☺ Ensuring people can step out if a topic is distressing
- ☺ Allowing sufficient breaks
- ☺ Paying attention to cues (including non-verbal signs) that someone may be struggling



Trauma-informed facilitators also bring a sense of hope and optimism, grounded in a genuine belief that recovery and healing are possible.

### What this may look like:

- ☺ Avoiding toxic positivity by acknowledging the weight and complexity of traumatic experiences
- ☺ Creating space for participants to connect authentically and learn from each other



In trauma-informed facilitation, trauma survivors are recognised as unique individuals who have lived through abnormal situations and coped in the best way they could.

### What this may look like:

- ☺ Understanding that distress responses vary widely between individuals
- ☺ Learning about trauma responses (e.g. fight, flight, freeze, fawn)
- ☺ Building in opportunities for participants to check in, including non-verbal options (e.g. thumbs up/thumbs down)
- ☺ Taking time to get to know participants, including their interests and sensitivities

## Core Principles of Trauma-Informed Facilitation

Trauma-informed facilitation is grounded in practices that promote safety, trust, choice, collaboration, and respect for diversity. These principles guide facilitators to create inclusive, empowering spaces that minimise harm and support healing.

### 1. Safety

Create environments where people feel physically and emotionally safe during interactions, discussions, and throughout the process.

#### What this could look like:

- ☺ Offering a quiet or safe space for participants to step away if overwhelmed
- ☺ Co-creating and upholding a group agreement
- ☺ Using intentional questioning (avoiding pressure to disclose personal trauma)
- ☺ Being self-aware and responsive to your own impact on the group

### 2. Trustworthiness

Foster trust through consistency, honesty, and clear communication.

#### What this could look like:

- ☺ Following through on what you say you'll do
- ☺ Respecting and using people's preferred communication methods (text, email, phone)
- ☺ Maintaining open, non-judgemental body language
- ☺ Being transparent about how feedback will be used in the co-design process
- ☺ Holding the group accountable to shared agreements

### 3. Choice

Wherever possible, give participants options in how they engage and contribute.

#### What this could look like:

- ☺ Asking participants if they'd like a break, rather than assuming
- ☺ Offering different ways to engage (e.g. talking, writing, drawing)
- ☺ Using low-pressure check-ins to gauge comfort and readiness
- ☺ Asking how participants would like to be involved, and adapting accordingly

## 4. Collaboration & Empowerment

Work alongside participants as equal partners. Value their perspectives, support their autonomy, and foster agency.

### What this could look like:

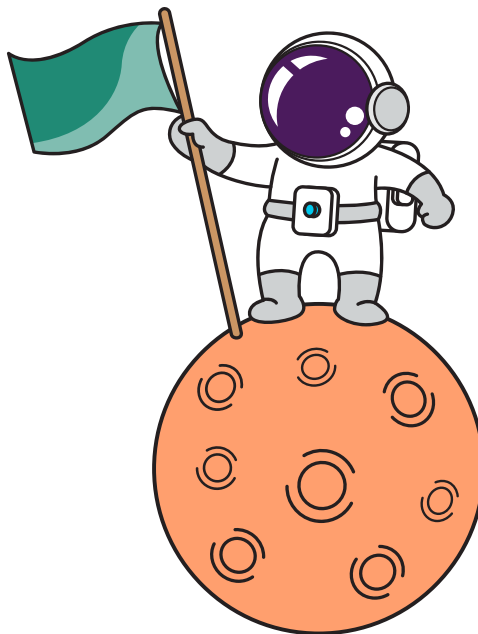
- ⦿ Trusting co-designers to lead and contribute meaningfully
- ⦿ Closing the feedback loop by showing how contributions are used
- ⦿ Encouraging genuine connection, laughter, and playfulness
- ⦿ Practising active listening and reflection
- ⦿ Providing multiple options for giving feedback

## 5. Respect for Diversity

Recognise that trauma disproportionately affects marginalised groups and take steps to work inclusively and respectfully.

### What this could look like:

- ⦿ Engaging in self-reflection on privilege and bias
- ⦿ Using peer supervision or reflective practice
- ⦿ Providing Easy Read or plain language materials
- ⦿ Supporting varied ways of participation
- ⦿ Using tools and checklists to guide inclusive practice







# Engaging in Co-Design Meetings:

## As a Facilitator

Outlines facilitator responsibilities and techniques to support inclusive, collaborative co-design sessions.

### Choosing your meeting type: online vs in-person

| Platform  | Why Choose This Style?                                                                                                                                              | How This Supports Co-Design                                           |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| Online    | Removes travel barriers for those with: <ul style="list-style-type: none"><li>Busy schedules</li><li>Caring responsibilities</li><li>Mobility challenges.</li></ul> | Increases accessibility, enabling broader participation.              |
|           | Offers flexibility and comfort, allowing participants to join from familiar environments.                                                                           | Creates a more inclusive environment where participants feel at ease. |
|           | Reduces costs (e.g., travel, venues, catering).                                                                                                                     | Allows more funding to be directed to project outcomes.               |
|           | Digital tools make it easy to record, transcribe and share discussions.                                                                                             | Enhances transparency and accurate feedback collection.               |
|           | Built-in features like polls, chat and break-rooms.                                                                                                                 | Encourages diverse forms of engagement.                               |
| In-Person | Improves non-verbal cues and focus.                                                                                                                                 | Fosters trust and deeper discussion.                                  |
|           | Hands-on activities, such as prototyping are more effective in physical settings.                                                                                   | Supports tangible and creative problem solving.                       |
|           | Casual interactions help build rapport.                                                                                                                             | Encourages open dialogue, especially around complex topics.           |
|           | Sensory engagement (e.g., working with materials) supports different learning styles.                                                                               | Enhances participation and collaboration.                             |

## Meeting Principles: Best Practice

### Online

- Digital PDFs and workbooks
- Live digital documents
- Breakout rooms
- Whiteboard apps
- Interactive poll apps
- Chat function on teams
- Emojis
- Emailing follow-ups

### Both

- Independent, group and whole class activities
- Whole group and breakout discussions

### In Person

- Hands-on tools for brainstorming
- Paper-based worksheets
- Art and Craft Activities
- Sticky notes

### What To Do

- ✓ Provide clear, structured agendas.
- ✓ Set clear expectations early.
- ✓ Discuss respectful communication upfront.
- ✓ Creating a plan to support your own mental health.
- ✓ Encourage boundaries for self-care.
- ✓ Acknowledge emotional impact.
- ✓ Practice trauma-informed facilitation:
  - Give advance notice for sensitive topics.
  - Use trauma safe language.
  - Allow for choice in participation.
- ✓ Build in time for follow-up:
  - Share accessible meeting minutes
  - Offer peer support and follow-up support post-meeting.

### What Not To Do

- ✗ Force participation.
- ✗ Put participants on the spot.
- ✗ Pressure participants to speak.
- ✗ Offer only one way to engage.
- ✗ Give unhelpful criticism or cutting off people when they share.
- ✗ Ignore signs of emotional distress.
- ✗ Meetings that are:
  - Use vague agendas
  - Hold overly long meetings or have no scheduled breaks.
  - Overloaded with activity or information.
- ✗ Disregarding privacy or confidentiality:
  - Record meetings without consent of the whole group.
  - Discuss sensitive topics in public.

# Facilitator Considerations

## ✦ In-Person

### Accessibility and Wellbeing

- Choose accessible, comfortable venues with good lighting and airflow.
- Share transport and parking info ahead of time.
- Offer a quiet space for breaks or sensory needs.
- Be responsive to environmental adjustments (e.g., lighting, temperature).
- Have a wellbeing plan (support person, resources).

### Logistics and Time Management

- Prepare the room in advance.
- Reinforce confidentiality and offer private spaces for sensitive discussions.
- Schedule regular breaks and check-ins.

## ✖ Actions to Avoid: Online Facilitation

### Logistics and Time Management

- Using complex platforms without support or alternatives.
- Failing to provide help with tech issue

### Accessibility & Wellbeing

- Holding long, continuous sessions.
- Rapid transitions between topics.
- Mandatory camera use
- Using inaccessible slides or one-way facilitation.
- Allowing one person to dominate the discussion.

## ✦ Online

### Accessibility and Wellbeing

- Encourage participation in flexible ways.
- Keep sessions short to avoid fatigue.
- Use engagement tools (chat, emojis, polls).
- Support use of captions, transcripts, and accessibility features.
- Respect camera/microphone choices.
- Provide virtual peer support.

### Logistics and Time Management

- Use secure platforms.
- Explain recording policies.
- Provide dial-in or tech support options.
- Have a backup plan for technical issues.

## ✖ Actions to Avoid: In-person facilitation

### Accessibility & Wellbeing

- Using overstimulating spaces (e.g., noisy, crowded, poor airflow).
- Shutting down disagreement instead of managing it respectfully.
- Not providing water, food, or rest options.
- Forcing rigid seating or long sessions without breaks.
- Encouraging debate styles that feel aggressive or unprepared.



***Icebreakers***

*ffr*

## Ice Breakers

Ideas and instructions for running effective icebreakers that build comfort, trust, and connection among participants.

### Here's how icebreakers are valuable in such settings:

#### Building Trust and Relationships

Co-design often involves diverse teams with varied expertise, and icebreakers help to break down initial barriers, enabling participants to feel more at ease. When people are comfortable with one another, they are more likely to communicate openly and contribute meaningfully.



#### Setting a Positive, Inclusive Tone

Icebreakers can help establish a safe and inclusive space where all participants feel respected and heard. This is crucial in co-design processes, where everyone's ideas and perspectives are essential for creating better solutions.

#### Promoting Creativity and Openness



Co-design often involves brainstorming and creative thinking. Icebreakers that focus on playful or out-of-the-box activities can help participants get into a more creative mindset, preparing them for the collaborative tasks ahead.

#### Facilitating Communication



Effective communication is key in co-design, and icebreakers can help to practice communication skills in a low-stakes environment. It helps participants get accustomed to sharing ideas and thinking aloud, which are essential skills for successful co-design.



#### Encouraging Participation

Sometimes, especially in groups where participants don't know each other well, people might hesitate to speak up. Icebreakers can encourage people to engage and share their thoughts, setting a tone that everyone's input is valued.

When selecting an icebreaker for a co-design session, ensure it aligns with the session's goals and creates a productive, inclusive, and comfortable atmosphere.

**Key factors to consider include:**

### Group Dynamics and Size

**Diverse Backgrounds:** In co-design, participants often come from varied disciplines, cultures, or experience levels. The icebreaker should be inclusive and not favour one group over another. The facilitator should ensure they're not making assumptions based on their own experience.

**Group Size:** The size will help determine the choice of icebreaker. Large groups benefit from small-group or paired activities before sharing, while smaller groups can use more intimate, in-depth icebreakers.

### Purpose of the Icebreaker

**Goal Alignment:** Ensure the icebreaker aligns with the session's goal. For creativity and ideation, choose a stimulating challenge, and for relationship-building, opt for personal storytelling.

**Setting the Tone:** Match the icebreaker to the session's tone. It could be light for fun or reflective for serious and focused discussions.

### Time Constraints

- Icebreakers should be quick and efficient, especially when time is limited.
- Select a 5–15 minute activity, based on session length.

### Comfort Levels

**Personal Boundaries:** In a co-design environment, people may feel more vulnerable when they must share personal information. Consider icebreakers that encourage sharing without putting participants on the spot. If you're facilitating a session with participants you don't know well, avoid overly personal or sensitive questions.

**Physical and Emotional Safety:** Embody trauma informed practice by ensuring that the icebreaker doesn't require physical activities or personal disclosure that may make some people feel unsafe.

### Cultural Sensitivity

- Co-design environments are often diverse, so it's essential that the icebreaker respects cultural differences.
- Avoid activities that may be misinterpreted or uncomfortable for people from different cultural backgrounds.

### Facilitator's Experience

- As a facilitator, choose an icebreaker you're familiar with, as some require more facilitation, especially those involving discussion or creativity.
- Choose an icebreaker that you are confident you can lead smoothly, ensuring everyone gets involved.

### Remote vs. In-Person

- If the co-design session is virtual, choose icebreakers that work in digital environments (e.g., breakout rooms, virtual polls, or online documents)
- In-person activities may include physical props/exercises, while virtual ones should utilize tools that are remotely accessible and engaging.

## Example Ice Breakers

Comfort Scale :



### Photo Album

**Group Size:** Any (done in pairs)

**Comfort Level:** 2

**Tone:** Introductions, relationship building

**Location:** Can be adapted for online

**Materials:** Participants need their smart phone

**Time:** 5-10 minutes

#### Theme suggestions:

- Something that makes me smile
- An achievement
- A happy memory
- My favourite person/animal

#### Method:

1. Have participants pair up.
2. Give them 1 minute to choose a photo from their phone based on a theme.
3. Each shares their photo and why they chose it (1 minute each).
4. Wrap up with a quick reflection on what they learned and how they felt.



### The Gift

**Group size:** Any

**Comfort Level:** 1

**Tone:** First time introductions

**Location:** In person only

**Materials:** None

**Time:** < 5 minutes

#### Method:

1. Sit everyone in a circle.
2. Tell everyone to tell the person to their right a noun (a person, place or thing).
3. Tell everyone to tell the person to their left an adjective (describing word).
4. Go around the circle, each person introducing themselves and telling the group what gift they received (by combining the adjective they received with the noun they received – for example, “I’m Michele, and I was given a disturbed toast.”)





## Lifeboats

**Group size:** 10–20

**Comfort Level:** 2

**Tone:** Relationship building

**Location:** In person only

**Materials:** None

**Time:** 5–10 minutes

### Method:

1. Explain the icebreaker is about finding common ground to “share a lifeboat.”
2. Call out a prompt (e.g., “Find someone who shares your favourite fruit”).
3. Participants group up based on shared answers.
4. Ask each group to share their answer, then call a new prompt and regroup.
5. Mix silly and serious questions as you go.

### Question Suggestions:

- Favourite planet
- Shared experiences
- Favourite music genre
- Favourite Season



## Two Truths and a Lie

**Group size:** Under 10

**Comfort Level:** 3

**Tone:** Relationship building

**Location:** In person only

**Materials:** Pen & A4 paper pp

**Time:** 10–15 minutes

### Method:

1. Give each participant a pen and paper. Ask them to write two truths and one lie about themselves (in any order), ensuring they do not indicate which is which. Remind them it will be read aloud.
2. Start by sharing your own as an example and let the group guess which of your 3 statements is the lie.
3. Go around the group with each participant taking their turn.



## Picture This!

**Group size:** Any

**Comfort Level:** 2

**Tone:** Relationship building/check in

**Location:** In person only

**Materials:** Deck of Image Cards

**Time:** 5–10 minutes

### Method:

1. Lay the picture cards face up on the table.
2. Give a prompt (e.g., “Pick a card that shows how you’re feeling today”).
3. Encourage gut instincts – first choice is best.
4. In groups of 10 or fewer, share and explain cards one by one. In larger groups, break into pairs or small groups.

## Animal Check In

**Group size:** 5–15

**Comfort Level:** 2

**Tone:** Relationships/check in

**Location:** Online/In person

**Materials:** 6–8 animal images

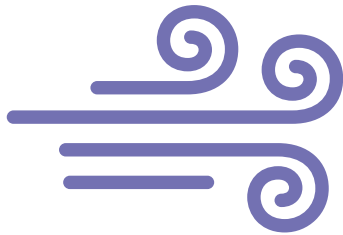
**Time:** 5 minutes

**Which red panda  
are you today?**



### Method:

1. Collect 6–8 images of an animal. It works best if each image shows a different expression or pose.
2. Combine images into a slide and number each animal
3. Ask the group “*which animal are you today*”
4. Share your choice first and something about yourself to help break down barriers (e.g., “*I’m no.5 because it looks sleepy, I didn’t sleep well last night and I feel sleepy today*”).
5. Invite participants to choose an animal that best represents how they feel.



## The Big Wind Blows

**Group size:** 5–15

**Comfort Level:** 3

**Tone:** Relationship building

**Location:** In person only

**Materials:** Chairs

**Time:** 5–10 minutes

### Method:

1. Have the group sit in a circle with one less chair than participants. Clear the area of any tripping hazards.
2. Stand in the middle and explain: the person in the centre says, “*The big wind blows for...*” followed by something true about themselves (e.g., “*...everyone who had coffee this morning*”).
3. Anyone that the statement is true for must stand up and switch seats; the last person standing then stands in the middle and comes up with the next choice.
4. Facilitator should observe the group’s tone and adapt accordingly.
5. After the game, hold a brief debrief to check in, especially if personal topics came up.

*Note: This game can be adapted for people who have difficulty moving by telling them they can stand up and then sit back in their spot.*

# Selecting Co-Design Activities

A tool to help facilitators choose co-design activities and engagement methods that align with the purpose and focus of the inquiry.

## Why Activity Selection Matters

Co-Design activities should suit both the topic and the people in the room. Matching activities to participants' ways of working helps build trust and ensure everyone can contribute meaningfully.

### Step 1

#### Clarify Your Area of Inquiry

##### Ask yourself:

- What are we trying to learn, understand or co-create?
- Is the goal to explore, prioritise, create, decide, or test?

This is also where you want to define your inquiry questions; the key points you want your activity to help capture. You want your question to be 'open', meaning it can't be answered with a simple 'yes' or 'no'. For instance:

| Closed Question                  | Why It's Closed                                |
|----------------------------------|------------------------------------------------|
| Did you enjoy today's session?   | Can be answered with "yes" or "no."            |
| Would you like to stay involved? | Simple yes/no or multiple-choice style answer. |

| Open Question                                                            | Why It's Open                           |
|--------------------------------------------------------------------------|-----------------------------------------|
| What did you enjoy or find challenging about today's session?            | Encourages reflection and storytelling. |
| Can you tell us about a time you felt included or excluded in a service? | Invites a personal story.               |

### Step 2

#### Match the Inquiry Type to Activity Styles

Select an activity that will help to answer your question/s, whilst also being mindful to the participants in the room and what they will find the most impactful and engaging.

**Tip:** Use a mix of activities (*e.g. one reflective, one interactive, and one decision-focused*).

| Type of Inquiry          | Activity Goal                            | Potential Activity Types                                               |
|--------------------------|------------------------------------------|------------------------------------------------------------------------|
| Exploring experiences    | Gather lived experience insights         | Storytelling circles, journey mapping, picture card reflections        |
| Understanding needs      | Identify unmet needs or pain points      | Empathy mapping, storyboarding, picture card reflections, Why analysis |
| Generating ideas         | Co-create new possibilities or solutions | SWOT analysis, sticky note brainstorming, pros and cons spreadsheet    |
| Testing ideas            | Assess reactions or feasibility          | Dot voting, decision trees,                                            |
| Prioritising or deciding | Make choices based on input              | Matrix plotting (impact vs effort), PESTLE analysis                    |

### Step 3

#### Consider Your Group

##### Ask yourself:

- ☐ Are there access or cultural considerations that might affect activity choice?
- ☐ What energy levels do you expect in the room?
- ☐ What communication styles are most comfortable for participants?
- ☐ What ways of working do participants prefer (e.g. visual, discussion, written)?
- ☐ Are there power dynamics that the activity needs to help balance?
- ☐ Does the subject have potential to bring up sensitive issues? How can you navigate this safely?

# Adult Learning Guide

Introduces key adult learning principles to support co-design training and workshop delivery.

## Key Principles of Adult Learning

According to adult learning theory, adults learn best when the approach aligns with their experiences, motivations and needs. Here are the core principles that shape adult learning:



### Self-Direction

- Adults prefer independence in learning and appreciate autonomy.
- They value having control over what, when, and how they learn.



### Motivation

- Adults are driven by factors such as self-esteem, quality of life, personal growth, and career development.
- Learning is more effective when it connects to their personal or professional goals.



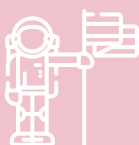
### Experience

- Adults bring a wide range of lived experiences, skills and prior learning into new learning situations.
- This means they often engage in critical thinking and problem solving but also may have ingrained perspectives that shape their approach to learning.



### Readiness to Learn

- Adults learn best when they see relevance and value in the content.
- They are goal oriented and want to understand “why” and “what” of what they are learning.



### Orientation

- Adults prefer practical, real-world applications over theoretical concepts.
- They focus on immediately useful knowledge that applies to their daily lives or work.

## Best Practices for Engaging Adult Learners

By applying these strategies, you can create meaningful, engaging, and effective learning experiences.

### Make Learning Practical and Experiential

- ♥ Use hands-on activities, real-world scenarios, and role-playing to encourage active learning.

### Encourage Self-Directed Learning

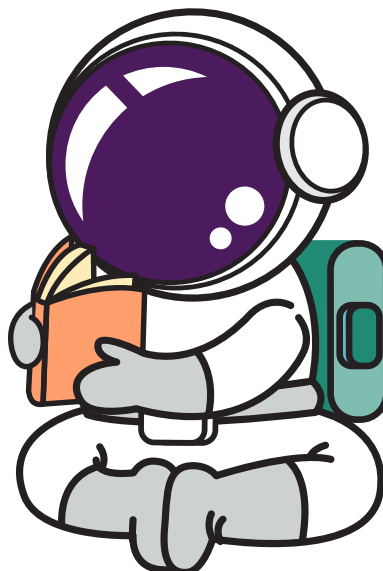
- ♥ Provide choices in how participants engage (reading, discussion, hands-on activities).
- ♥ Allow room for self-reflection and independent problem solving.

### Use a Variety of Learning Approaches

- ♥ Visual aids (info-graphics, videos, slides).
- ♥ Discussion and group work (peer learning, storytelling).
- ♥ Reading and self-paced content.
- ♥ Practical, hands-on activities.

### Acknowledge and Build on Lived Expertise

- ♥ Validate and integrate participants' knowledge and skills into the learning process.
- ♥ Encourage knowledge-sharing and discussion, allowing participants to contribute their expertise.



# Facilitator Wellbeing Guide

Provides practical suggestions for maintaining facilitator wellbeing during emotionally demanding or complex projects.

Facilitating co-design, especially when working with people who share lived experiences of distress or trauma, can be both deeply rewarding and emotionally demanding.

Participants may express strong emotions, share confronting stories, or disengage due to discomfort. Navigating these dynamics require resilience, preparation, and self-care.

Below are some key self-care practices that facilitators can incorporate into their routine:

## 1. Debriefing After Sessions

Regularly debriefing with peers, co-facilitators, or supervisors after a session provides an opportunity to process emotions, reflect on the experience, and gain perspective. This practice helps facilitators acknowledge challenges, celebrate successes, and avoid carrying emotional burdens alone.

### Tips for effective debriefing:

- ♥ Schedule time after sessions to check in with a colleague or supervisor.
- ♥ Share your experiences and emotional responses in a supportive space.
- ♥ Reflect on what worked well and what could be improved.
- ♥ If helpful, participate in peer supervision or structured reflection.

## 2. Setting Clear Personal Boundaries

Boundaries are not barriers, they are a foundation of safe and respectful facilitation for both yourself and participants. Clear boundaries help prevent burnout and make facilitation more sustainable over time.

### Ways to set boundaries:

- ♥ Clarify what falls within your role and what doesn't.
- ♥ Communicate your boundaries with co-facilitators and the broader team.
- ♥ Prepare strategies for moments when boundaries are tested.
- ♥ Take breaks when needed and avoid over-committing.

## 3. Familiarising Yourself with Content and Triggers

Being familiar with your content and identifying topics that may personally affect you is an important part of emotional preparation. Facilitators bring their own lived experience, and some topics may resonate deeply or feel confronting.

### Strategies for managing triggering content:

- ☮ Review training materials thoroughly before sessions.
- ☮ Identify specific topics or activities that might be difficult for you.
- ☮ Develop coping strategies, such as grounding techniques or self-care routines.
- ☮ Communicate with co-facilitators about areas where you may need support.

## 4. Recognising and Managing Signs of Distress

As a facilitator you may experience stress or emotional distress during or after sessions. Recognising your own signs of distress allows you to take proactive steps to manage your wellbeing.

### Common signs of distress may include:

- ♥ Feeling emotionally drained or overwhelmed during or after a session.
- ♥ Physical symptoms such as headaches, tension, or fatigue.
- ♥ Difficulty concentrating or feeling disengaged.
- ♥ Heightened irritability or emotional sensitivity.

### How to manage distress:

- ♥ Engage in self-care activities such as mindfulness, deep breathing, or physical movement.
- ♥ Create a personal check-in system to assess how you are feeling.
- ♥ Speak with co-facilitators about how they can support you.
- ♥ Seek support from a supervisor or mentor if needed.

## 5. Accessing Professional Support When Needed

Asking for help is a strength, not a weakness. Facilitation is relational work and no one does it alone. Therapists, counsellors, or peer support networks can offer tools and guidance tailored to your needs.

### Ways to access support:

- 😊 Engage with Employee Assistance Programs (EAPs) if available.
- 😊 Seek individual counselling or supervision from a mental health professional.
- 😊 Connect with other facilitators through peer support groups.
- 😊 Take breaks or adjust workloads if experiencing ongoing stress or burnout.

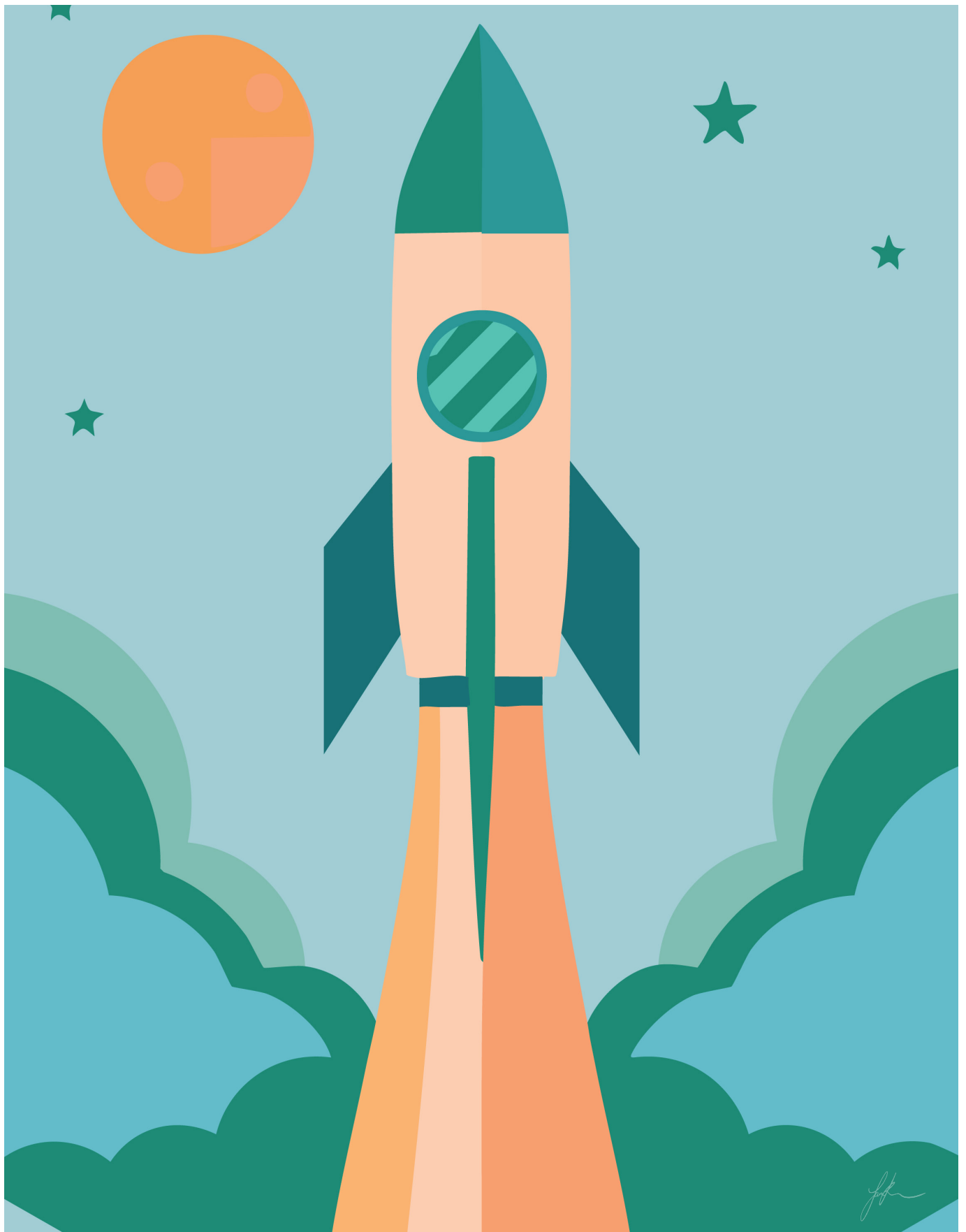


### Remember:

Your wellbeing matters. Caring for yourself is part of caring for the co-design process.







**Facilitation Reflection  
Workbook**

**A Guide for Facilitating Co-Design**

# Facilitation Reflection Workbook

## A Guide for Facilitating Co-Design

A guided workbook to help facilitators reflect on their practice, strengths, and areas for improvement over time.

Facilitating a co-design session is a dynamic and collaborative experience. Your role is to create an inclusive environment where all participants feel heard, valued and empowered to contribute.

**This workbook supports self-reflection throughout your facilitation journey, helping you:**

- Assess your strengths and areas for growth.
- Identify patterns in group dynamics.
- Improve facilitation techniques to better support participants.
- Navigate challenges, conflicts, and successes with confidence.

### Recommended Use:

- *Before your first session:* Reflect on strengths and areas for growth.
- *After each session:* Capture insights and refine your approach.
- *After the full project:* Evaluate impact and celebrate achievements.

## Before your First Session

In the table below are a series of **facilitation skills**.

**Select 3** that you feel are strengths of yours to bring to co-design facilitation:

|                                                                                                            |                                                                                                                           |                                                                                              |
|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <b>Active listening</b><br>Attentively listening, understanding, responding thoughtfully.                  | <b>Impartiality</b><br>Remaining neutral and guiding discussions fairly.                                                  | <b>Time Management</b><br>Keeping sessions on track while ensuring meaningful contributions. |
| <b>Awareness</b><br>Recognising group dynamics and adapting your approach.                                 | <b>Questioning Technique</b><br>Asking open-ended questions that encourage deeper thinking.                               | <b>Conflict Resolution</b><br>Managing disagreements constructively.                         |
| <b>Safety &amp; Inclusivity</b><br>Ensuring all voices are heard and respected.                            | <b>Responsiveness</b><br>Adjusting facilitation style based on participant needs.                                         | <b>Synthesis</b><br>Summarising key themes for discussions.                                  |
| <b>Engagement</b><br>Keeping energy levels high through interactive activities.                            | <b>Clarity</b><br>Communicating instructions and expectations clearly.                                                    | <b>Energy Management</b><br>Monitoring group energy and adjusting accordingly.               |
| <b>Trauma-Aware</b><br>Framing discussions carefully to minimise harm, allowing participants to step back. | <b>Cultural Awareness</b><br>Understanding and respecting cultural contexts, using collective language where appropriate. | <b>Relationship-Building</b><br>Prioritising trust and rapport before deeper engagement.     |

## Your Strengths:

### Skill 1

How have I demonstrated this strength in the past?

Why is this a strength of mine?

### Skill 2

How have I demonstrated this strength in the past?

Why is this a strength of mine?

### Skill 3

How have I demonstrated this strength in the past?

Why is this a strength of mine?

## Recognising Areas of Growth

Now, select two skills you would like to strengthen.

### Skill 1:

How do I feel about having to use this skill in facilitation?

How can I improve this skill?

How can I manage difficulties with this skill whilst facilitating?

### Skill 2:

How do I feel about having to use this skill in facilitation?

How can I improve this skill?

How can I manage difficulties with this skill, whilst facilitating?

## Co-design Preparation

### Key Considerations Before Your Session:

What is the overarching goal of this co-design project?

**Who are your participants? How will you ensure they feel comfortable and confident engaging?** Consider the physical environment, your communication, and how you welcome participants.

# After Each Co-Design Session

These pages can be printed multiple times to reflect after each session.

## Strengths in Action:

How did I apply my strengths in this session – what went well?

| Strength Used             | Positive Outcome                             |
|---------------------------|----------------------------------------------|
| Example: Active Listening | Helped participants feel heard and validated |
|                           |                                              |
|                           |                                              |
|                           |                                              |

## Challenges and Responses:

What challenged me in this session, and how did I respond?

Did participants seem:

- Engaged? (e.g., note taking, nodding, responding, discussing)
- Comfortable? (e.g., contributing, smiling, relaxed body language)
- Understanding your instructions? (e.g., responding to tasks/activities)

| Challenge                | Mitigation Strategy                                                         |
|--------------------------|-----------------------------------------------------------------------------|
| Example: Power imbalance | Co-create and set clear group guidelines, encourage shared decision-making. |
|                          |                                                                             |
|                          |                                                                             |
|                          |                                                                             |
|                          |                                                                             |

### Improving for Next Time:

Consider what you learned during today's session.

**What will I adjust in my facilitation approach for the next session?**

**How did you spend time building relationships with participants in this session?**

**How did you mitigate power imbalance?**

**What was achieved in today's session?**

**What did you get out of today's session?**

**On a scale of 1–10, how do you feel about today’s session?**

Consider your mood, energy level, physical state.

1 ----- 2 ----- 3 ----- 4 ----- 5 ----- 6 ----- 7 ----- 8 ----- 9 ----- 10

**What self-care actions will you take today?**

### **After a Co-Design Project**

Upon completion of your co-design project, you may find completion of this final reflection to be helpful.

**What about the project made me proud?**

**What did we achieve?**

**What feedback did I receive about my facilitation?**

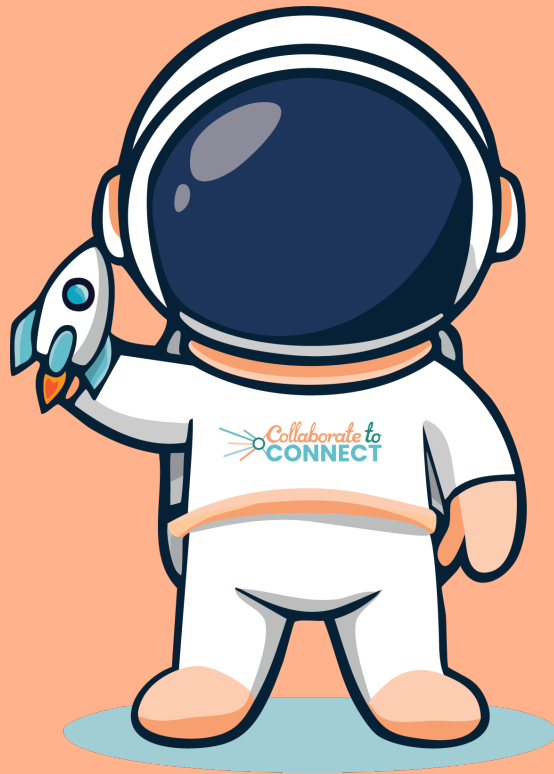


**What did I learn about myself, through this project?**

**How can I reward myself for my dedication to this project?**







# ***EXPLORE NEW FRONTIERS OF COLLABORATION***



**Consumers of  
Mental Health WA**  
*Listen. Advocate. Change.*



**[www.comhwa.org.au](http://www.comhwa.org.au)**

This project is funded by the Australian Government  
Department of Social Services.

© 2025 Consumers of Mental Health Western Australia