



Checklist for Coproduction

This checklist should be completed by the Senior Project Manager with reference to the “5 Steps to Coproduction” model developed by the Common Assessment Framework for Adults Demonstrator Programme (CAFA), and the notes on page 13 of this document.

The Senior Project Manager should then use the “results” section, at the end of this document on page 14, to find out if their project is working in coproduction.

This checklist should be completed at each major project checkpoint to ensure coproduction is maintained throughout the life of the project. After each completion of the checklist, if the project is not running in coproduction an action plan should be put in place to resolve any issues.

Project Name:

Project Description:

Project start date:

Project end date:

Completion of checklist

Project Phase	Date	Name (Project Manager)	Contact Details	Link to Action Plan
Start				
End				



Project Background			
Where did the idea for the project come from?			
	A government strategy, regulation or initiative	Yes/No	Name of strategy or regulation
	A member of staff	Yes/No	Name, Position, Organisation
	A professional	Yes/No	Name, Position, Organisation
✓✓✓	A service user or carer	Yes/No	Name, Area of expertise or experience
	Other	Yes/No	Name, Position, Organisation
	Is your project supported by the most senior management in all organisations taking part in the project?	Yes/No	Evidence

1. Identification of all Groups of people affected by the service or project

Have you identified:-

✓	All groups who will be direct recipients of the service or project outcomes, including those groups who may have special needs or those that have specific problems of access (e.g. people whose first language is not English).	Yes/No	List all groups here
✓	Groups positively affected	Yes/No	List all groups here
✓	Groups negatively affected	Yes/No	List all groups here
✓	Secondary affected groups, such as carers	Yes/No	List all groups here
✓	Staff who will use the service/project outcome	Yes/No	List all groups here
✓	Staff who will maintain the service/project outcome	Yes/No	List all groups here
✓	Project team who will implement the service/project	Yes/No	List all groups here
Have you separately confirmed that you have identified everyone who will be affected by your project?			
✓	If yes say how	Yes/No	Evidence



2. Engagement

For each of the groups identified in the previous question, give the name of the person who is representing that group:

	Group from previous question	Name of person representing group
	Group from previous question	Name of person representing group
	Group from previous question	Name of person representing group
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	Group from previous question	Name of person representing group
	Group from previous question	Name of person representing group
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	Group from previous question	Name of person representing group
	Group from previous question	Name of person representing group
	Group from previous question	Name of person representing group
	Group from previous question	Name of person representing group

Please add rows or continue on a separate sheet if necessary



2. Engagement (continued)

For each of the groups identified in the previous question, detail all groups who have **no** representation

	Group from previous question	State how the needs of this group are incorporated in the project
	Group from previous question	State how the needs of this group are incorporated in the project
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Please add rows or continue on a separate sheet if necessary

2. Engagement (continued)

For each group as identified above, list how participants contribute to the project:-

Group Name	Initial input then no further involvement	Kept informed only	Intermittent input	Attendance at meetings	Email updates and correspondence	Telephone updates and correspondence	Other (specify)
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method
Group from previous question	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method	Number of people using this method

Please add rows or continue on a separate sheet if necessary

2. Engagement (continued)

Do you employ methods to remove barriers to involvement

✓	Yes/No	
Please detail the methods you are using to remove barriers to involvement:-		
✓✓✓	Paying expenses so that financial considerations do not stop an individual contributing	Number of people benefiting from this method
✓✓✓	Providing signers to allow deaf individuals to participate	Number of people benefiting from this method
✓✓✓	Choosing accessible locations so wheelchair users can attend	Number of people benefiting from this method
✓✓✓	Scheduling meetings at appropriate times, so for example, avoiding 9 a.m. meetings which would disadvantage people who would like to attend but who have school age children or are carers	Number of people benefiting from this method
✓✓✓	Using an independent facilitator who can ensure everyone has an equal voice	Number of people benefiting from this method
✓✓✓	Other (please specify)	Number of people benefiting from this method

3. Empowerment

Do you employ methods to empower the people participating in your project?

✓	Yes/No	
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Please detail the methods you are using to empower participants in your project, including experts by experience.

✓✓✓	Provide training to enable them to participate effectively in meetings	Number of people benefiting from this method
✓✓✓	Provide coaching to ensure everyone is representing the group they have been chosen to represent, not using their position to highlight their own issues	Number of people benefiting from this method
✓✓✓	Provide opportunities to expand their personal skills, giving them, as an example, an opportunity to take on the role of chairperson or other specific roles	Number of people benefiting from this method
✓✓✓	Provide coaching to allow everyone to work effectively with other team members, perhaps by attending assertiveness training	Number of people benefiting from this method
✓✓✓	Provide training to allow everyone to effectively use IT equipment, be that receiving information by email or more advanced skills.	Number of people benefiting from this method
✓✓✓	Other (please specify)	Number of people benefiting from this method

4. Governance			
✓	Do you have a defined management structure?	Yes/No	Give details
✓	Is the responsible for the successful completion of the project clearly identified?	Yes/No	Give details
✓	Is the person or group who have financial accountability clearly defined?	Yes/No	Give details
✓	Is the reporting line of the project staff clearly defined?	Yes/No	Give details
✓	Is the involvement of the experts by experience clearly specified?	Yes/No	Give details
✓	Is there a person responsible for ensuring the coproduction methodology is maintained?	Yes/No	Give details
✓	Is there a terms of reference for each working group?	Yes/No	Give details
	Do the terms of reference contain:-		
✓	• Aims and responsibilities for the group	Yes/No	Give details
✓	• Role description for all group members	Yes/No	Give details
✓	• Agreement documenting principles	Yes/No	Give details
✓	• Process for resolution of disputes and conflicts	Yes/No	Give details



5. Delivery

Were all the groups identified as being affected by this project involved at every major project checkpoint in the project:-

✓	Project start	Yes/No	Give details
✓		Yes/No	Give details
✓		Yes/No	Give details
✓		Yes/No	Give details
✓	Project end	Yes/No	Give details

Please add in additional lines if required



Representatives

This page should be completed by at least one person who is representing each of the groups as identified in section 1.

Name:

Position or Area of Expertise:

Contact Information:

Question		Yes or No	Comments
✓	Are you representing a specific group who will be affected by this project or initiative?	Yes/No	Specify group
✓	If you are representing a specific group, do you feel the group you are representing is given adequate representation?	Yes/No	Give details
✓	If you are representing a specific group, do you feel you are able to represent the needs of that group, rather than your own specific needs?	Yes/No	Give details
✓	Do you feel you work effectively with other members of the team?	Yes/No	Give details
✓	Have you been offered any training, for example assertiveness or meeting skills?	Yes/No	Give details
	Are your IT skills sufficient to carry out your role?	Yes/No	
✓	If your IT skills are not sufficient to carry out your role, have you been offered training?	Yes/No	Give details
✓	Have you been given the opportunity to take on additional responsibilities, such as an opportunity to chair meetings?	Yes/No	Give details



	Is this something you would like to do?	Yes/No	
✓	If you attend meetings, do you feel you are able to participate effectively?	Yes/No	Give details
✓	Have you been able to contribute to this project where you have not been able to attend meetings?	Yes/No	Give details
✓	Do you feel that your views are always taken account of?	Yes/No	Give details
✓	Do you feel that your skills (either professional skills or those gained from experience) are valued within this project?	Yes/No	Give details
✓	Do you feel you have an equal voice with the other people contributing to this project?	Yes/No	Give details
✓	Do you feel that you are sufficiently involved in the key project activities to properly influence the project?	Yes/No	Give details
X	Have there been any instances when your views have been disregarded?	Yes/No	Give details



Notes for Completion of Checklist

1. Identification of all Groups of people affected by the service or project

This section is used to document all of the groups who will be affected by your project. This includes both the direct recipients of the service, and indirect recipients such as their carers. It also includes special groups, for example, recipients with sight or hearing loss.

2. Engagement

This section contains several different pages and is used to ensure that you have engaged representatives from all of the groups you identified in section 1. You are asked to list all of the groups (on the left hand side of the page) and say who is representing each group. An individual may represent more than one group. Where it has not been possible to provide a representative, you are asked to specifically identify the groups without representation and state how you ensure their needs are represented in the project. If this representation is not adequate, as judged by the other representatives on the project, then your project is not running in coproduction. This section also allows you to document how your representatives contribute to the project, e.g. attending meetings, via e-mail, and what methods you have employed to remove barriers to people contributing.

3. Empowerment

Having representatives contribute to the project by attending meetings or contributing by email is just part of the coproduction methodology. To fully comply you need to actively empower representatives. This could be by giving them training on meeting skills, or by any number of methods. This section allows you to document how you empower your representatives.

4. Governance

This section is all about the rules of the project and making it clear to everybody, not just external representatives, how the project will run and who has the power to make decisions.

5. Delivery

This section allows you to document when representatives are involved in the project. Every major project checkpoint should be documented on the left hand side of the page. For each checkpoint you need to detail how you have involved representatives in your project.



Representatives

Coproduction is about ensuring the people who will be affected by the project have a real say in how the project develops.

The only people who can say if this is so, are the representatives themselves.

At least one representative of each group identified in question 1 should complete this page. If an individual is representing more than one group, they only need to complete the checklist once.

Results

- If you answered “yes” to any question with an “X” to the left of the question, you are not running in coproduction.
- If you answered “yes” to all the questions with a single tick to the left of the question, you are running in coproduction.
- If you also answered “Yes” to any or all questions with a triple tick, you are aiming to run your project at the highest level of coproduction

Additional Information on Coproduction

The following documents are also available on the website www.sayitonce.info

Coproduction - Model - A five step model of coproduction

Coproduction - Frequently Asked Questions (FAQs)

Feedback

If you have any questions or you would like to offer any feedback about this document please contact:-

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