

The ENSPIRE Codesign Playbook



A step-by-step
guide for codesign
in public health
interventions

Kaiser Permanente Washington Health Research Institute

Kaiser Permanente Georgia Center for Research and Evaluation





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Welcome to the Playbook

The ENSPIRE Codesign Playbook provides:

- A deep dive into **how we used the codesign method** in the **ENSPIRE study**
- **Sample materials** from our project for you to **adapt and use**

We invite you to draw on our experience when developing your codesign project and process.

ENSPIRE at a glance

ENSPIRE was a 3-year study at long-term care (LTC) centers in Georgia and Washington state.

Staff at these centers joined with the study team to codesign posters, brochures, videos, and other materials to promote the COVID-19 booster vaccine to LTC employees.

ENSPIRE compared the impact of these materials with the impact of materials from the CDC (Centers for Disease Control and Prevention) and other national organizations promoting the COVID-19 booster. **The goal was to learn whether either set of materials:**

- Increased COVID-19 booster vaccination rates among LTC staff
- Increased the willingness of LTC staff to promote the booster

ENSPIRE was funded by the Patient Centered Outcomes Research Institute, an independent nonprofit organization supporting research that can help patients and those who care for them make better-informed health care decisions.

Note: We use the term “centers” when discussing the care sites we collaborated with, including assisted living, skilled nursing, and independent living communities.

ENSPIRE:

Engaging Staff to
Improve COVID-19
Vaccination Response
at Long-Term Care
Facilities



Read about our
study's findings:

**ENSPIRE: A cluster
randomized trial of
codesigned, tailored
vaccine promotion
materials.**

*Contemporary Clinical
Trials.* January 2024.

More about ENSPIRE

Each codesign team had 2 co-facilitators:

- A facilitator from the ENSPIRE study team
- A facilitator from the community

Co-facilitators from the community shared racial/ethnic identity with their codesign teams and were recruited and hired by the study team. All had experience working in or visiting LTC centers.

The codesign teams designed materials, selected communications channels, and received brief training on peer advocacy for promoting the COVID-19 booster.

ENSPIRE's model was uniquely designed to be more rapid than most codesign efforts: Design and production took 10 to 12 weeks compared to 6 to 9 months for many other projects.^{1,2}

The codesign process resulted in these deliverables:

- A set of core messages about COVID-19 booster vaccines
- Communications strategies transformed into professionally designed materials and ideas for dissemination at LTC centers

Once materials and plans were presented and endorsed, the LTC centers assumed responsibility for sharing the materials, with the ENSPIRE team providing technical support (phone calls, online meetings) for 3 months.

More about our methods

Our codesign process was based on the following methods and resources:

- Boot Camp Translation²
- Lean-inspired codesign^{3,4}
- User-centered design frameworks for engaging communities and product users⁵
- Immunity Community interventions for decreasing vaccine hesitancy for childhood vaccines⁶



Our playbook

The ENSPIRE playbook provides a **step-by-step guide** outlining what to consider when developing a codesign project and process.

How our playbook is different

Codesign playbooks and toolkits^{7,8} often provide a high-level view into planning a codesign project, covering topics such as:

- Building a team
- Framing the problem
- Mapping user experience
- Testing prototypes
- Monitoring and evaluating

These resources usually focus on the **strengths of codesign and reasons to use it**. In contrast, the ENSPIRE Codesign Playbook provides **stepwise instructions** for how to implement codesign. We build upon the work of 2 key resources:

- The LINCC (Learning to Integrate Neighborhoods and Clinical Care) project⁹
- The Community-Led Codesign Kit from the Inclusive Design Research Centre⁵

These are both excellent sources for advice, instruction, and inspiration. For example, the Community-Led Codesign Kit website includes a remote codesign guide, as well as sections on planning codesign activities and defining roles and responsibilities for codesign sessions.

We hope our playbook is useful to people across a spectrum of professions, organizations, and communities, including those working, volunteering, or creating in:



Public health programs



Quality improvement



Implementation science



Participatory research



Long-term care services

For each step in the playbook, we give you:

1. Questions to consider

What to ask yourself and your team

2. From the field

How ENSPIRE put codesign into practice

- 1 "Boot Camp Translation (BCT)," University of Colorado Anschutz, medschool.cuanschutz.edu/family-medicine/research-and-innovation/research-methods/bootcamp-translation, accessed June 28, 2024.
- 2 Ned Norman et al. "Boot Camp Translation: A Method for Building a Community of Solution," *Journal of the American Board of Family Medicine*, May-Jun 2013.
- 3 Jeff Gothelf. *Lean UX: Applying Lean Principles to Improve User Experience*. O'Reilly Media Inc., 2013.
- 4 Iain Smith et al. "Adapting Lean Methods to Facilitate Stakeholder Engagement and Co-design in Healthcare," *BMJ*, January 28, 2020.
- 5 "Community-Led Co-design Kit," Inclusive Design Research Centre, co-design.inclusivedesign.ca/, accessed September 10, 2024.
- 6 Jennie Schoeppe et al. "The Immunity Community: A Community Engagement Strategy for Reducing Vaccine Hesitancy," *Health Promotion Practice*, September 2017.
- 7 "What is Design for Health?" Design for Health, s3.amazonaws.com/files.designforhealth.org/What+Is+Design+for+Health.pdf, accessed September 10, 2024.
- 8 "Co-design Playbook: Using Integrated Care Partnerships to Design Better Health," Alberta Health Services, s3-us-west-2.amazonaws.com/transformativelearning/2019/test/Integrated+Care+Partnerships+Guide+DRAFT+1.1.6.9.pdf, accessed September 10, 2024.
- 9 "Partnering with Patients as Equals in Co-Designing Primary Care: Examples and Tools from the LINCC Project," Kaiser Permanente Washington Health Research Institute, 2017, kpwashingtonresearch.org/application/files/5615/5866/2635/LINCC_PartneringWithPatientsCareDesign_Final.pdf, accessed September 10, 2024.



1. SETTING THE STAGE

1.1 Discovering codesign – what does "codesign" mean?

Questions to consider:

Codesign compared to traditional design

- How does codesign differ from traditional design approaches?
- Who is involved in a codesign project?
- Who leads the codesign process?

Pros and cons of codesign

- What are some pros of using codesign for your project?
- What are cons of using codesign?

From the field:

ENSPIRE found many benefits to codesign – and some challenges

The Inclusive Design Research Centre in Toronto defines collaborative design – or “codesign” for short – as a process of designing with, rather than designing for:

“Those who are most impacted by the design, especially those with needs least served by existing designs, are involved in the process from its earliest stages. They are engaged throughout the process, and directly contribute to the creation of designs that meet their unique needs. Participants are not involved as research subjects or consultants, rather as designers engaged in active and sustained collaboration.”¹

Codesign is different from traditional design methods in key ways. The Western Victoria Primary Health Network, based in Geelong, Australia, provides this helpful summary:

“Codesign emphasises three problem-solving qualities – explorative, iterative and collaborative. It is differentiated from other problem-solving approaches by its focus on properly spending the time to fully understand the challenge before even attempting to develop the solution. It also makes a point of identifying and testing assumptions, drawing on real human behaviour and motivators, and testing and refining solutions until they are demonstrably fit-for-purpose in the eyes of those who will be affected by the design or change.”²

Our codesign had the following elements recommended by the Inclusive Design Research Centre:¹

- Engaging with people impacted by the issue of interest
- Designing **with** rather than **for** community members
- Recognizing codesigners as leaders in the design process
- Collaborating in a setting familiar to codesigners – in our case, meetings were online and codesigners could join from anywhere convenient to them
- Supporting engagement with the product created through codesign

Pros and cons of codesign

The ENSPIRE team found many benefits to doing our work via codesign:

- Long-term care center staff could create messages and choose images for a public health campaign that reflected values and beliefs shared by their peers.
- Codesigners enjoyed working as a team with a shared mission and getting to know others who had similar life experiences and values outside the context of their work.
- Codesigners felt their opinions and voices were valued and appreciated. This seemed particularly important during the stressful and exhausting COVID-19 pandemic.
- Codesign led to a sense of engagement and empowerment that could have an impact beyond the codesign experience – for example, if long-term care staff saw a positive impact of their codesign efforts in their workplace.

But there were also challenging factors:

- Codesign takes a lot of time and resources. The amount of effort can vary depending on your problem/challenge, how easy it is to find codesigners, and the availability of partner organization staff to support the full process.

- Funding is often needed to offer stipends to codesigners and compensate partner organizations for any staff time required to support codesign.
- An effective process depends on thorough planning of the codesign sessions to ensure activities will be engaging and facilitators are well prepared.
- As with any community and public health project, codesign calls for flexibility, adaptability, and a good sense of humor.
- Although codesigners have knowledge of their peers and may share some values and beliefs, they may also differ from their peers in their opinions related to the issue under consideration in codesign (for example, opinions about the COVID-19 vaccine). It can be hard for codesigners who care deeply about an issue to consider how to persuade others who have a deeply held opposing viewpoint.
- Ensuring engagement requires carefully considering multiple pathways for people to feel comfortable sharing and providing input.

¹ "Introduction to Community-Led Co-design," Inclusive Design Research Centre, co-design.inclusivedesign.ca/introduction/, accessed September 10, 2024.

² "A Guide to Co-design," Western Victoria Primary Health Network, westvicphn.com.au/wp-content/uploads/2021/01/WVPHN_CodesignGuide_Digital-1-5.pdf, accessed September 10, 2024.

1.2 Define your problem/challenge/question

Questions to consider:

- What problem or challenge is your community facing that needs codesign?
- Specifically, what are you wanting to come up with or create to help the community address that problem? Are you trying to create a better program, or education tool, or recruitment message, or something else?
- What makes codesign a good fit for the problem you are addressing?
- Who are possible partners that should be at the table when determining a solution to this problem? Are there, for example, community leaders or policymakers to include?

From the field:

Why use codesign in ENSPIRE, a vaccine-promotion research project?

Our problems to address:

- When we created our codesign project, staff at long-term care centers had the lowest COVID-19 vaccination rates of frontline health care workers in the United States, at around 50% in April 2021.¹
- To motivate staff to get the vaccine, long-term care centers were using strategies similar to those used with flu vaccination annually. They also were using a few novel approaches, including vaccine mandates, required masking for staff who were unvaccinated, and financial incentives. Although these strategies may increase vaccination rates, they do not necessarily improve how confident people feel about the safety and efficacy of vaccines.
- Many center staff were not confident or trusting about the COVID-19 vaccine. Community-engagement strategies are important for improving vaccine confidence, especially for immigrant/refugee groups and communities of color that experience racism and discrimination in both research and health care.²
- Mistrust of governmental and medical systems extends to vaccines and messaging about them.

What is the Problem?



Long-term care staff need to get COVID booster shots.



Some staff still don't trust the vaccine.



Some friends and family still need to get the COVID vaccine.

Why codesign was a good fit for ENSPIRE:

- Through codesign, ENSPIRE was able to foster collaboration with our community of interest: staff at long-term care centers.
- Our codesign teams created and distributed materials promoting the COVID-19 booster vaccine to other long-term care center employees.
- All our codesigners worked in teams with a shared racial/ethnic identity. We believed the messages created by these teams would be more relatable and compelling for long-term care center staff.³

¹ "KFF COVID-19 Vaccine Monitor," Kaiser Family Foundation, kff.org/coronavirus-covid-19/dashboard/kff-covid-19-vaccine-monitor-dashboard/, accessed September 10, 2024.

² Strategies for building confidence in the COVID-19 vaccines, National Academies of Sciences, Engineering, Medicine, The National Academies Press, 2021.

³ Robb Butler et al. "Diagnosing the Determinants of Vaccine Hesitancy in Specific Subgroups: The Guide to Tailoring Immunization Programmes (TIP)," *Vaccine*, August 14, 2015.

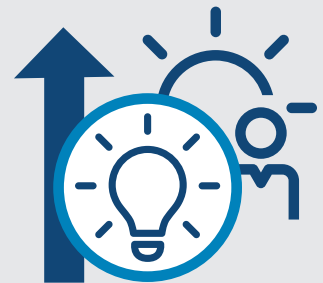
What do we want?



More staff **get** COVID
booster vaccine



Fewer staff **worry**
about COVID vaccine



Staff **know** more about
COVID vaccine



2. MAPPING AND ORGANIZING YOUR CODESIGN

2.1 Shape your codesign approach

Questions to consider:

- What organizational needs or deadlines will determine how much time is available to plan and implement codesign?
- How many codesign teams will you have?
- How often will team(s) meet?
- How many people will be on a team?
- How many staff members (full-time employees) are necessary to implement codesign?
- What will the product or outcome of the codesign be?



From the field:

ENSPIRE created a 10-week codesign strategy

Codesign can vary from a process completed over several hours or several days, to a series of meetings over many months or even a year.^{1,2,3,4}

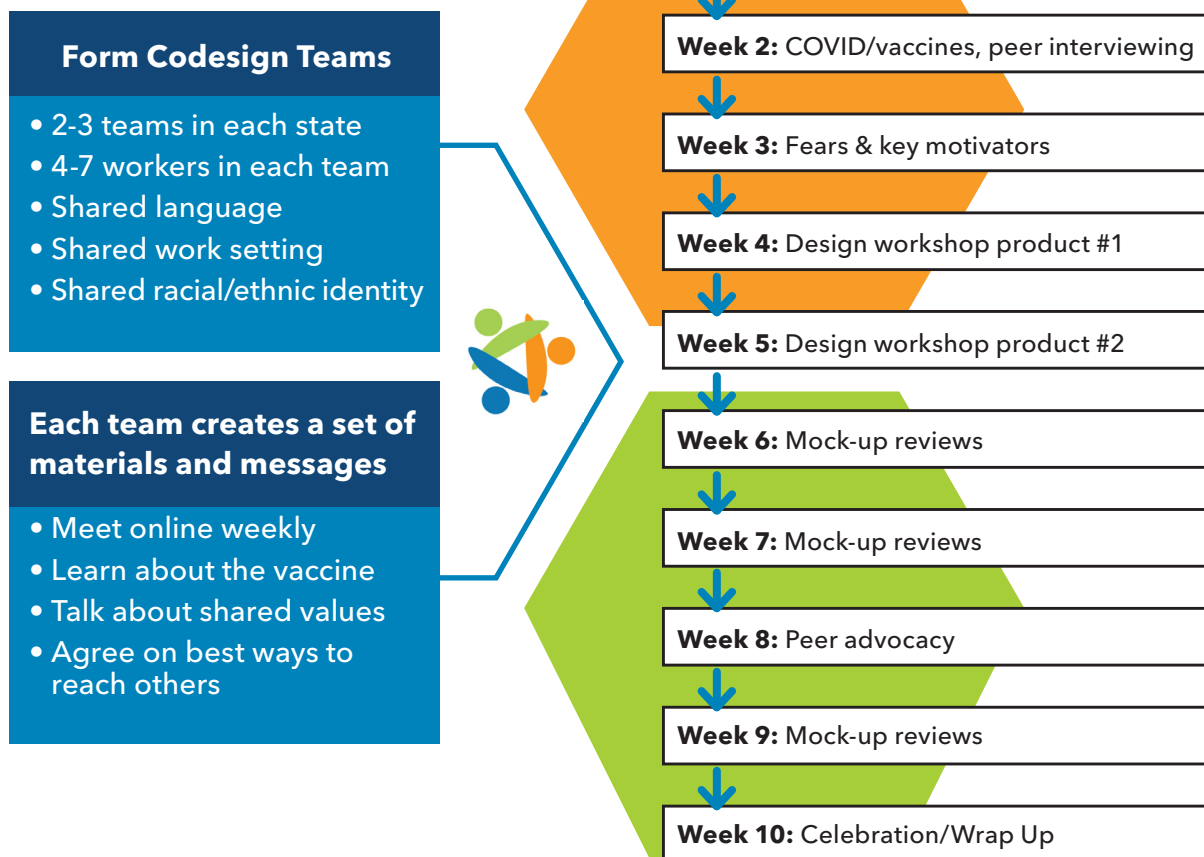
For ENSPIRE, we invited 27 long-term care staff from 10 centers to develop tailored COVID-19 vaccination-promotion materials over several weeks. Codesigners worked in 5 teams, each with a shared racial/ethnic identity. They were also trained in nonconfrontational vaccine conversations to help promote the materials to their peers.^{4,5}

The codesign process – including training, design workshops, and reviews – lasted 10 weeks.

For more on peer conversations, see "Session 8" in the ENSPIRE curriculum.



ENSPIRE's codesign process



ENSPIRE built on the following codesign approaches, adapting their methods to fit our needs, the communities we were partnering with, and our study goals:

Boot Camp Translation (BCT)⁶ is a successful community-based participatory research method for codesigning materials, communicating information, and promoting behavior change for health issues including hypertension, diabetes, colorectal cancer screening, chronic pain, and cardiovascular disease. BCT's efficacy is likely due to an approach that involves:

1. Forming partnerships between researchers and local community members
2. Increasing relevance of evidence-based interventions by using language and concepts that resonate locally
3. Disseminating messages via effective community and personal channels

LINCC (Learning to Integrate Neighborhoods and Clinical Care)^{7,8} was a project that used codesign to develop and implement a new primary care role: a lay staff person to connect patients with community resources. Patients were equal partners with clinic staff in designing this new primary care service. LINCC used a 4-day design event and subsequent 1-day “check and adjust” event a year later.

1 Kelly A. Schmidtke et al, “A Workshop to Co-design Messages that May Increase Uptake of Vaccines: A Case Study,” *Vaccine*, September 2022, p. 5407.

2 “Co-Designing with Kids with Complex Needs,” Inclusive Design Research Centre, co-design.inclusivedesign.ca/case-studies/co-designing-with-kids-with-complex-needs/, accessed September 27, 2024.

3 Nathaly Aya Pastrana et al, “Improving COVID-19 Vaccine Uptake: A Message Co-Design Process for a National mHealth Intervention in Colombia,” *Global Health Action*, August 29, 2023.

4 Sarah E. Brewer et al, “Engaging Communities in Preventing Human Papillomavirus-Related Cancers: Two Boot Camp Translations, Colorado, 2017-2018,” *Preventing Chronic Disease*, January 2, 2020.

5 “Talking about Vaccines: HEART Method,” Immunity Community, immunitycommunitywa.org/talking-about-vaccines/, accessed September 27, 2024.

6 Ned Norman et al. “Boot Camp Translation: A Method for Building a Community of Solution,” *Journal of the American Board of Family Medicine*, May-June 2013.

7 “Partnering with Patients as Equals in Co-Designing Primary Care: Examples and Tools from the LINCC Project,” Kaiser Permanente Washington Health Research Institute, 2017, kp.washingtonresearch.org/application/files/5615/5866/2635/LINCC_PartneringWithPatientsCareDesign_Final.pdf, accessed September 10, 2024.

8 “Community-Led Co-design Kit,” Inclusive Design Research Centre, co-design.inclusivedesign.ca/, accessed September 10, 2024.

2.2 Select the populations where you will recruit codesigners – use your problem/challenge/question to drive this

Questions to consider:

- Who is impacted by the problem or issue you are addressing?
- What kinds of experience should your codesigners already have, and what can they learn along the way?
- Who will want to engage with the issue and team up with others like themselves? Are there others who are important to include but may need more effort on your part to recruit and engage?
- Which of the following attributes would be appropriate for your codesigners – or what other attributes are relevant to your problem/challenge/question and the impacted community?
 - Place where people live, work, play
 - Age
 - Language(s) spoken
 - Impact of a particular health issue/condition/disease
 - Connection to an institution like a school, health system, or workplace
 - Ethnicity or racial identity
 - Gender identity
 - Lived experience

From the field:

ENSPIRE codesigners shared work setting, racial/ethnic identity, location

In our ENSPIRE project, we decided to frame our codesign teams around attributes we thought most important in designing promotional materials for COVID-19 boosters:

- **Place:** Live in Georgia or Washington state (where we were conducting the research)
- **Connection to workplace:** Work at any job in the long-term care centers we were partnering with
- **Racial/ethnic identity:** Matching largest groups working in long-term care in Georgia and Washington
- **Language(s):** Any language that fits with selected racial/ethnic identities
- **Impact:** All long-term care staff had been impacted by COVID-19 during the pandemic
- **Age:** Any age
- **Gender identity:** All genders

We focused on race/ethnicity because:

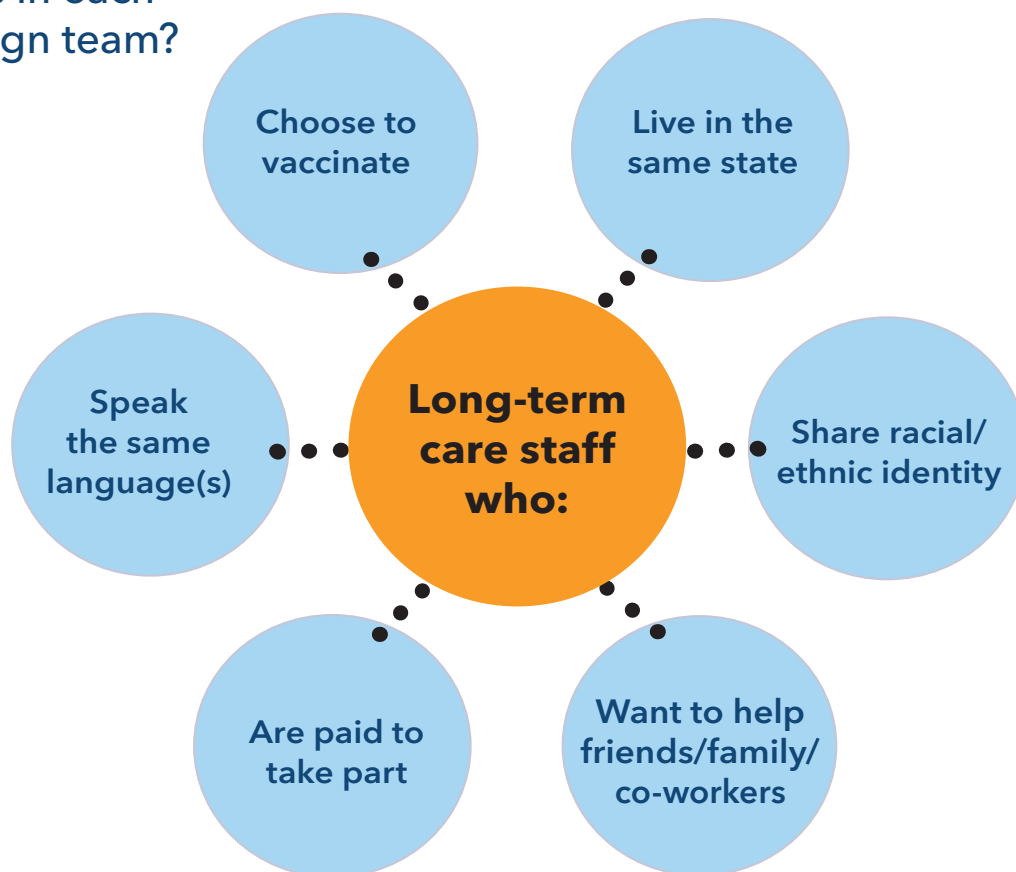
- Research and other reports indicated that race and culture influence attitudes toward vaccines
- Some racial/ethnic groups were disproportionately affected by COVID-19
- This approach allowed for the creation of a safe, comfortable environment

We used survey data and conversations with administrators to identify the racial/ethnic identities most represented among our partnering long-term care centers. We identified:

| WASHINGTON | GEORGIA |
|--|---|
| Black/African American, African, Latino, Asian Pacific Islander, and white | Black/African American, Afro Caribbean, and white |

This would be our starting point for recruitment.

Who is in each codesign team?



2.3 Build a codesign project team and define each person's role

Questions to consider:

- How will you organize your project team?
- What will be the key elements of your codesign team(s)?
- Who will be responsible for activities and behind-the-scenes tasks?
- Who will lead the project team?
- Who will provide support to leaders, co-facilitators, codesigners?

From the field:

ENSPIRE's project team included admin support, leadership, co-facilitators (staff and community), codesigners, and a communications production team.

ENSPIRE's codesign project team

Administrative Support

- Coordinate meetings
- Arrange budgets & payments
- Provide technical support
- Prepare materials

Leadership

- Draft curriculum
- Make timelines & schedules
- Communicate across teams
- Lead meetings

Codesigners

4-10 individuals
Share identity with each other
Connected to the topic
Want to help their community

Co-facilitators

- Staff and community co-facilitators
- Share identity with codesigners
- Have good facilitation skills
- Are familiar with the topic

Communications Production Team

- Meet with teams
- Draft codesign materials
- Respond to edits
- Prepare final products

ENSPIRE's staff had deep experience collaborating with community partners, facilitating group work, understanding the public health topic, and training peers and partners. Some staff had experience doing codesign.

Administrative support

We were fortunate to have administrative support to provide a lot of behind-the-scenes technical and logistic support. These team members arranged incentive payments, conducted screening interviews, provided technical support, and generally kept the project going when an extra set of hands was needed.

Codesign leadership

We asked one staff person to be primarily responsible for leading the codesign portion of our study. This person worked with another colleague to develop early drafts of the curriculum, keep timelines and schedules, serve as a communications point person, and lead regular meetings with the facilitators of our codesign teams. This person was also primarily responsible for maintaining and distributing final versions of the curriculum to all facilitators.

Co-facilitators

Each codesign team had two facilitators:

- One from the research team
- One with extensive community-based experience.* Many of the community-based co-facilitators had direct experience working in long-term care, which was very helpful.

All co-facilitator pairs shared racial/ethnic identity with their codesign team members. This was important, as we wanted codesigners to feel comfortable and confident talking openly with their fellow codesigners and their co-facilitators. We also valued the cultural expertise the co-facilitators would bring to codesign.

**The team in Washington that was Black/African American/African Immigrant was led by 3 co-facilitators: an African Immigrant researcher, an African American community-based co-facilitator, and an African Immigrant community-based co-facilitator.*

Codesigners

Codesigners were all employed as staff in a long-term care center and living in Georgia or Washington state at the time of codesign. They were asked to attend weekly codesign meetings, complete several "homework" assignments, and take part in follow-up evaluation interviews after codesign. All codesigners on any given team shared racial/ethnic identity with each other and with their co-facilitators.

Communications production team

The communications production team included a team lead, a copy editor, a graphic designer, and a video editor. One communications staff member was assigned to each codesign team to attend select meetings and gather input and feedback from codesigners. The communications production staff worked as a team behind the scenes, as all 10 products created through codesign needed production support (writing, editing, design).

2.4 Decide who will best facilitate your codesign sessions

Questions to consider:

Facilitator number, content expertise, attributes

- How many facilitators will you have for your codesign team(s)?
- What are the attributes your facilitators need to have?
- What is more important for your project: having facilitators who match with codesigners on attributes (for example, profession, race/ethnicity) or who have content expertise related to the codesign topic?
- Which skills/knowledge/experiences will your facilitators need in advance versus which can be trained?
- What are some interpersonal skills your facilitators will need (for example, making participants comfortable, encouraging vibrant conversation)?



Meeting scheduling and logistics

- How long will your codesign process take, and how does that impact who you bring on as facilitators?
- Who will determine the codesign meeting times/days – and how does this impact who is available to facilitate?
- Where will your facilitators be based – will activities be in person or online?

Locating facilitators

- Will your facilitators be existing staff members of your project?
- How will you locate, identify, and recruit additional facilitators if needed?

Compensating facilitators

- Will facilitators be paid staff, contractors, volunteers?
- What is the best way to compensate facilitators? How does this fit your organization's administrative system?

From the field:

Facilitator number, content expertise, attributes

ENSPIRE decided to have co-facilitator pairs for each codesign team because we recognized that the process would benefit from having:

- **Community-based co-facilitators** with life experiences similar to our codesigners' and, if possible, expertise in long-term care
- **Staff-based co-facilitators** with ongoing experience with the study

Having co-facilitator pairs would also allow for support and coverage if a facilitator became ill.

Our community-based co-facilitators needed a unique skillset, and finding people who fit each team was challenging. Here are some of the characteristics we were looking for in co-facilitators:

- Very flexible availability to attend possible meetings afternoons, evenings, weekends
- Availability to work with us over the next 6 months
- Group facilitation skills, including confidence and skills to facilitate meetings online
- Shared racial/ethnic identity with codesigners
- Reliable access to technology during all sessions
- Effective communications skills
- Willingness to talk about promoting the COVID-19 booster and develop promotional materials
- Good time-management skills
- Experience in long-term care, if possible

See ENSPIRE's
job description
for the
community
co-facilitator
role.



Meeting scheduling and logistics

Our 10-week codesign timeline was determined by:

- The content we needed to convey to codesigners
- The goal of each team producing 2 motivational products
- The desire to include a buffer week to accommodate unforeseen barriers or slowdowns along the way

Our co-facilitators needed to be available for 12 weeks total:

- 2 weeks of orientation/training
- 10 weeks of codesign meetings

We prioritized accommodating our codesigners' work schedules when we set meeting times and dates. Our co-facilitators had to be available at those same times. Even if they had full-time employment, they would continue to be available throughout our codesign period.

Locating facilitators

We cast our nets far and wide to identify and recruit good candidates for our community co-facilitators. This included reaching out to:

- Community co-investigators and research team connections
- Community partner organizations
- Our national advisory committee

Once we had interested candidates, our staff facilitators interviewed their prospective co-facilitators.

Compensating facilitators

See [section 3.3](#) for information about payment and support.



2.5 Build a timeline – from planning through codesign

Questions to consider:

Staff resources

- How many staff members do you have available to plan and support codesign? How will this affect your planning and codesign timeline?

Facilitation needs

- How many facilitators do you need to hire and train?
- How much training will they need?

Institutional/organizational considerations

- How long does your hiring or contracting process usually take?

Finding and supporting codesigners and their schedules

- Do you have community partners who can help you invite codesigners, or will your staff need to conduct outreach?
- Do you have codesigners who can make time for this (for example, retirees or people who will do this as part of their regular job) or will they engage in this work in addition to a regular job?
- Do codesigners have professional experience related to your codesign topic – both content and process – or is this a new experience for them?

Curriculum needs

- How much structure do the facilitators need in a curriculum to run the codesign process?

Product development as part of the codesign process

- Will you need to include time for your staff or a marketing team to design materials based on what the codesigners decide to include?
- Who do you need to coordinate with about production of the final products?
- How quickly do you need the final products?



From the field:

ENSPIRE had an 8-month timeline for codesign, from start to finish

ENSPIRE was a large research project conducted with a robust staff.

- We were fortunate to have administrative staff as well as leadership to support the project.
- We also had staff codesign facilitators who already had a lot of facilitation experience and only needed training specific to the curriculum.
- We relied on our own staff to do in-person outreach to invite codesigners from our partner long-term care centers.

Key timeframes:

- Planning: 4 months
- Codesign: 10 weeks

| 2022 | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|-----|-----|-----|-----|-----|-----|-----|-----|
| MONTH | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| Develop organizational structure and team roles | | | | | | | | |
| Select community to work with | | | | | | | | |
| Recruit and hire community co-facilitators | | | | | | | | |
| Recruit and partner with long-term care sites | | | | | | | | |
| Recruit and hire codesigners | | | | | | | | |
| Develop curriculum | | | | | | | | |
| Prepare session materials | | | | | | | | |
| Develop orientation and trainings for co-facilitators | | | | | | | | |
| Train, engage, and support community co-facilitators | | | | | | | | |
| Test and train on online platform for sessions | | | | | | | | |
| Engage and support codesigners | | | | | | | | |
| Hold weekly co-facilitator team meetings | | | | | | | | |
| Hold weekly codesign sessions | | | | | | | | |
| April 2023: Conduct codesigner evaluation interviews | | | | | | | | |



3. CONDUCTING YOUR CODESIGN

3.1 Recruit, interview, and select codesigners

Questions to consider:

Codesigner numbers, content expertise, attributes

- How many codesigners will you have for your codesign team(s)?
- Which attributes outlined in [section 2.2](#) do your codesigners need in advance? Which can be taught or trained?

Meeting scheduling and logistics

- How long will your codesign process take, and how does that impact who you bring on as codesigners?
- What factors are important to consider when determining the codesign meeting times/days? How does this impact who is available to participate?
- Where will your codesigners be based – will activities be in person or online?

Recruiting codesigners

- Will your codesigners be people you already know or others?
- How will you locate and identify the codesigners you want and need?
- What kinds of recruitment make most sense for your project? Will you advertise online, through word of mouth, via posters/flyers, at community-based organizations?
- How will you talk about compensation in your communication with potential recruits?

Selecting codesigners

- What is the best way to screen individuals before including them in your project?

From the field:

ENSPIRE recruited through project partners and selected codesigners based on project goals

Codesigner numbers, content expertise, attributes

ENSPIRE planned to include 10 codesigners per team, but quickly discovered that it was going to be very difficult to reach those numbers. We discussed how many codesigners would be necessary for each team to feel robust and ended up with a minimum of 4 members in each team.

Our partnership with specific long-term care centers limited our recruitment pool to the staff working at those centers.

| CODESIGNER ATTRIBUTES SOUGHT | TRAINING PROVIDED |
|---|---|
| Content expertise (this was ensured given that all codesigners worked at long-term care centers) Professional diversity Gender diversity Not anti-vaccine, although we did not require that participants had received the COVID-19 vaccine | Principles of codesign Basics about COVID-19 vaccines Fundamentals about product creation |

Meeting scheduling and logistics

We settled on meeting weekly for 10 weeks for 2-hour sessions. We learned that this schedule limited who could take part.

Other scheduling ideas considered:

- Having longer sessions on 2 separate weekend days
- Reducing the number of meetings to 4 to 6 sessions

Once we had our teams of codesigners, we polled them to identify the best times for meetings. This required schedule flexibility for our participants.

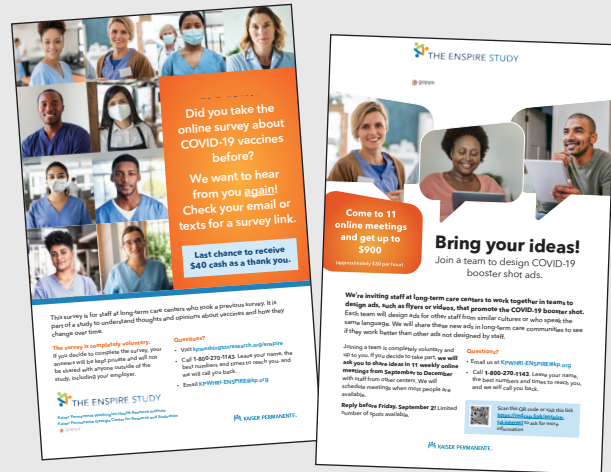
We met online, which had both pros and cons:

- Pros: Increased access to meetings, and no one had to travel to attend meetings.
- Cons: Some participants needed technical assistance, and some people felt meeting online was not as engaging as meeting in person.

Recruiting codesigners

Study staff members worked with our communications production team to design recruitment materials for codesign.

We conducted outreach through emails and posters to all staff at participating long-term care centers. Recruitment materials described compensation of up to \$900 and an expected time commitment of 2 hours per week for 10 weeks.



Selecting codesigners

All interested participants, whether recruited in person or through ads, were asked to complete an **interest survey** to determine their eligibility to take part in codesign. Among the people who replied to our recruitment ads, 51 completed our codesigner interest survey. They then completed the **screening interview**.

Our goal with the screening interview was to confirm that potential codesigners:

- Met the racial/ethnic identity description for their respective teams
- Wanted to work collaboratively with others to promote the COVID-19 vaccine

It was important to ensure codesigners were not against COVID-19 vaccination, as we felt that would create too much conflict during meetings and creative development. We took the time to explain the process and what the tasks would look like, and we ultimately decided not to offer spots to some people who we felt would bring negativity to the team.

3.2 Develop your codesign curriculum

Questions to consider:

Curriculum content and techniques

- How much background material regarding the topic of focus do you want to share with codesigners?
- What expertise do codesigners bring to the process that they will want to share with their peers?
- Will you use homework/assignments outside of sessions as a tool for participation and engagement? If so, what do you need to share during sessions to convey these assignments?
- What kinds of activities or exercises would be effective for working through ideas or questions during sessions? What activities feel right for your topic and community?

Rapport/building comfort

- Do your codesigners already know each other? If not, how much time do you want to spend each week on developing rapport with one another?

Mode and equipment

- How will you share materials during codesign sessions: paper, poster, whiteboard, slides, video, presentation/lecture?
- If meeting in person, what kinds of tangible materials will you use? White board, sticky notes, notepads?

Pacing

- How many hours/days/weeks/months are you using for codesign? What is your codesigner availability like?
- How does the meeting time of day impact how long codesigners would want to spend in a meeting?
- How much flexibility will you build into your curriculum – how fluid will it be?

Writers/developers/presenters

- How much input will people in different roles have in developing the curriculum? Project staff? Facilitators? Community partners? Codesigners?
- Will you invite “experts” to join sessions to share content?

From the field:

ENSPIRE developed a 10-week curriculum that codesign teams could modify as needed

.....

ENSPIRE used a 5-step process to develop our codesign curriculum

- 1** We identified and accessed as many codesign curricula as possible from online searches and conversations with colleagues. This yielded few detailed materials and nothing that was comprehensive enough to adopt and adapt easily without drafting material ourselves.
- 2** Two project staff drafted early versions of our curriculum over several months.
- 3** The larger staff team reviewed and made suggestions to the draft curriculum. Our national advisory committee made up of professionals in public health and long-term care provided reviews and input on an early draft.
- 4** Staff co-facilitators continued to refine the curriculum and prepare exercises and materials until the community co-facilitators came on board and were oriented and trained.
- 5** The complete “final” curriculum was distributed to the co-facilitator pairs at the beginning of the codesign period, and then week-to-week in co-facilitator team meetings. This week-to-week approach ensured that adjustments could be made when teams got behind on the original curriculum timeline or co-facilitators decided that codesign teams needed more or less of a certain content area.

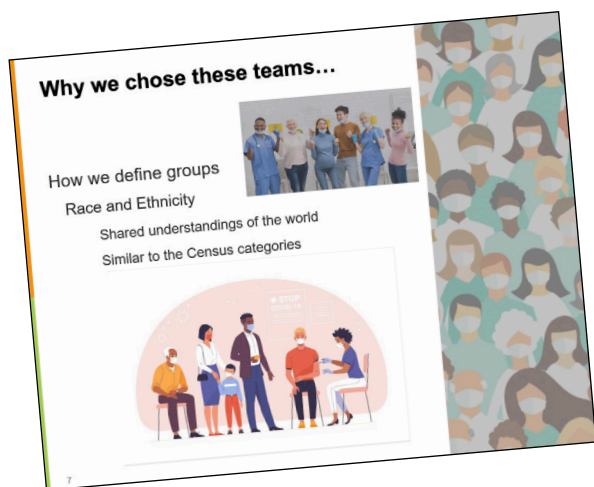
ENSPIRE's curriculum at a glance

| CODESIGN: High-level content areas | | |
|------------------------------------|-------------------------------------|---|
| Sessions | | Content |
| 1 | Welcome & introductions | Introductions: facilitators, codesigners |
| | Project overview & codesign process | <ul style="list-style-type: none"> • Group meeting agreements • Land and labor acknowledgement • Review research goals: increase booster uptake, increase booster knowledge, increase booster promotion • Review codesign process and goals |
| | Active listening & interviewing | Mindful listening activity, practicing active listening |
| | COVID-19 vaccine in our lives | Brainstorm re: COVID-19 vaccine and booster in our lives |
| 2 | COVID-19 basics | COVID-19 virus and vaccine basics, impact in our community DISCUSSION |
| | History of vaccines | History of vaccines: exploitation, testing on vulnerable people, consent, etc. DISCUSSION |
| | Interviewing basics | Tips on doing interviews |
| | ASSIGNMENT: Peer interview | Conduct interview with a peer who shares your racial/ethnic background |
| 3 | Interview findings | Sharing from peer interview assignment DISCUSSION |
| | Fears & key motivators | Discuss why people are and are not getting the booster |
| 4 | Design guardrails | Examples and guardrails to guide design process |
| | Design workshop: Product #1 | Identifying key motivating factors, brainstorming product wording |
| | ASSIGNMENT: Find image & music | Locate photos, images, music to inspire the team |
| 5 | Design workshop: Product #1 | Products and dissemination; images and music; what do we want to say? |
| 6 | Design workshop: Product #2 | Review key motivating factors; products and dissemination |
| | ASSIGNMENT: Find image & music | Locate photos, images, music to inspire the team |

| CODESIGN: High-level content areas | | |
|------------------------------------|---------------------------------|---|
| 7 | Re-introductions | INTRODUCTION: Communications production team/ codesigners |
| | Product #1 mock-up review | Review and edit mock-ups of product #1 |
| | Design workshop: Product #2 | Images and music; what do we want to say? |
| 8 | Peer advocacy | Sharing a personal story, learning the HEART model Empathy and difficult conversations |
| 9 | Product #1 & #2 mock-up reviews | Review and edit mock-ups of products #1 and #2 Finalize dissemination plans |
| 10 | Product #2 mock-up review | Review and edit mock-ups of product #2 |
| | Wrap-up & celebration | Celebrate successes; slide show of final products from all codesign teams |

For each codesign session, we prepared a slide deck, icebreaker topics, handouts, and other visuals, such as video clips. This was a critical step that took time for staff to draft and for co-facilitators to review and adapt.

Co-facilitator pairs were empowered to adapt the slide decks and curriculum as necessary to fit their individual teams. These adaptations proved minimal but significant for co-facilitators to feel confident about using the curriculum with their teams.



3.3 Train, engage, and support facilitators

Questions to consider:

Orientation and training

- Will your facilitators benefit from both an orientation (an overview of codesign) and a training (an in-depth review of the step-by-step process and the curriculum)?
- How much training do your facilitators need?
- Are they familiar with the content area or problem you are addressing?
- Do they have good group facilitation skills already?
- Are you building the curriculum together or training them in something you have developed – or somewhere in between those two?

Engagement, meetings, support

- How often will your facilitators meet to debrief after codesign sessions and prepare for upcoming sessions?
- How will you share impressions, learnings, and inspiration between facilitators?
- How will you compensate your facilitators? How much is reasonable, and what will be a feasible mechanism for paying them?

From the field:

ENSPIRE provided orientation, training, payments, and regular team meetings for facilitators

Orientation and training

Our orientation and training goals were to provide community co-facilitators with a foundation to function as equals with their staff co-facilitator counterparts. We intentionally designed the trainings as an abridged version of the curriculum the co-facilitators would be delivering during the codesign period.

See ENSPIRE's full codesign curriculum.



See the ENSPIRE co-facilitator training curriculum.




Over 3 meetings, we covered the following content areas:

- **Orientation**
 - o ENSPIRE study overview, including study goals, intervention, and research methods
 - o Timeline
 - o Curriculum overview
 - o Expectations for co-facilitators (meeting times, meeting etiquette, absences)
 - o Necessary Zoom skills
- **Training #1**
 - o Participating long-term care communities
 - o COVID-19 in long-term care communities (conversation)
 - o COVID-19 vaccine and booster in our lives (conversation)
 - o Reviewing a COVID-19 video
 - o Group facilitation
- **Training #2**
 - o Mindful listening
 - o Communicating about vaccines (conversation)
 - o Roles and services from our communications production team
 - o Curriculum handbook
 - o Logistics Q&A

Expectations- Meeting Times

- Co-facilitators pairs will meet
 - **Before each session** to decide on the roles for each activity (~30 mins)
 - **After each session** to debrief (could be a single meeting to plan and debrief) (~30-60 mins)
- All co-facilitators will attend a weekly all-team meeting (1 hour)
- During weekly co-design sessions (~2-3 hours)



See ENSPIRE's suggested resources for developing Zoom skills.



Although the orientation and training sessions were designed primarily for our community co-facilitators, our staff co-facilitators attended as well. The orientation and trainings were all scheduled the week before the codesign meetings started to ensure this was fresh in co-facilitators' minds.

Engagement, meetings, support

- **Facilitator meetings**
 - o **All-facilitator meetings:** All our facilitators met weekly to debrief the previous session and become oriented on the next week's session. The upcoming week's curriculum and slides were reviewed as a group.
 - o **Co-facilitator meetings:** Co-facilitator pairs also met immediately following each week's codesign session to debrief with each other, assign duties, and problem-solve any issues anticipated for the next week's session.
- **Compensation**
 - o Our community co-facilitators were paid \$60/hour for all time contributed to the project, including orientations and trainings, meeting planning, and codesign sessions. Because we were working within a large research organization, we had to work with bureaucratic challenges of contracting the facilitators and processing their payment, which required time and patience.

3.4 Gear up for codesign sessions: online versus in person

Questions to consider:

- Considering your codesigners, how would in-person versus online meetings be beneficial?
- What would be the challenges of meeting in person versus online?
- Will your budget cover the costs of in-person meetings? What about the costs of supporting online meetings?
- If you hold meetings online, are some codesigners more likely to take part (for example, codesigners with disabilities)?
- What kind of technology will your codesigners need if you hold meetings online? Can your organization assist with this?
- Are there codesigners who would have challenges with the technology involved in online meetings?
- What kinds of ongoing tech support will you need to provide to codesigners and facilitators if codesign takes place online?

From the field:

Online codesign was better for ENSPIRE but required equipment, training, ongoing technical support

We had originally considered the possibility of holding in-person codesign meetings. We quickly realized that would not be feasible. We identified the following challenges to using in-person meetings for our project:

- Our codesigners were distributed over a large geographic area in each state. Bringing them together in person would have required a lot of travel time, and the travel burden may have prevented some codesigners from taking part.
- Expenses for meeting in person – such as travel costs, lodging, time from work, and childcare – would have quickly increased for the project and for individual codesigners.
- We were working with a low-wage workforce under immense strain due to staffing shortages. It would not have been feasible to ask people to take time off work to attend codesign meetings. Instead, they attended online after work, and some even attended while at work because they could get short-term coverage to take part.

The decision to meet online presented a unique set of planning considerations. We allocated resources for the following:

- Providing loaner iPads with data service to codesigners without adequate devices or internet service for meeting online
- Allocating staff to provide ongoing technical support for codesigners
- Training codesigners to use Zoom
- Training staff to use Zoom fluidly, including instruction on more complex meeting tools to make the meetings engaging and seamless
- Ensuring all materials were developed for an online environment

3.5 Engage, support, and build trust with codesigners

Questions to consider:

Orientation

- Would it be helpful to have a one-on-one orientation meeting with each of your codesigners before the start of the codesign sessions?

Communication

- Considering your codesigners, what are the best ways to communicate with them before and after codesign sessions if necessary? When will you ask them about their preferences for communication?
- What frequency of meeting reminders, if any, would your codesigners appreciate?

Meeting norms and icebreakers

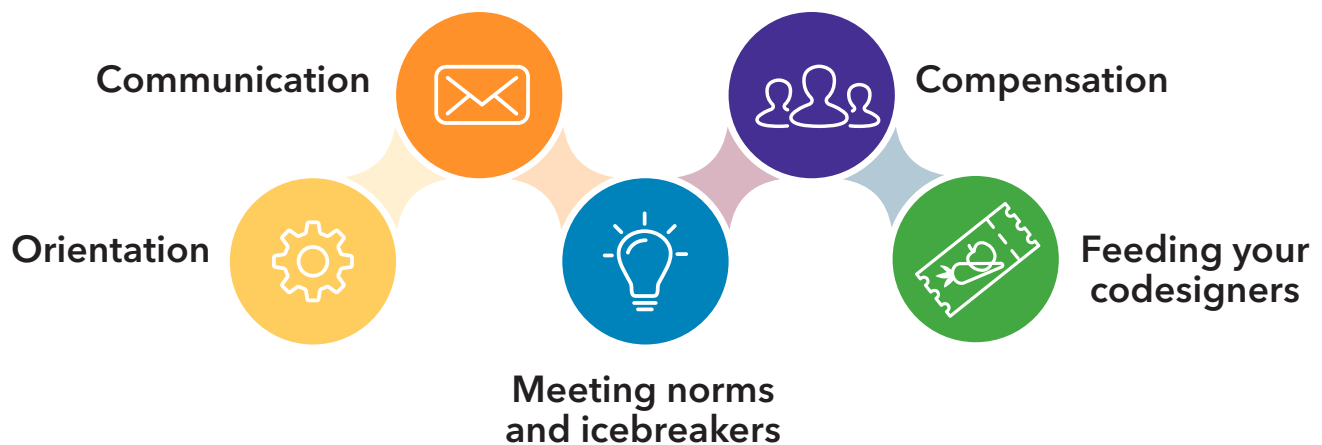
- Will you suggest meeting norms with your codesign team(s), or ask them to suggest norms, or something else? How familiar will they be with this concept of “norms”?
- How often do you want to do icebreakers at the beginning of sessions, and how much time can you allocate for that?

Compensation

- How will you compensate codesigners – how much, through what mechanisms, and how will you describe the compensation?

Feeding your codesigners

- If you are meeting in person, will you provide food at codesign meetings? What logistical issues related to providing food will you consider and resolve in advance? If you are unable to share a snack or meal in person, how will you create a similar sense of community?



From the field:

ENSPIRE used phone calls, text reminders, meeting norms, icebreakers, payments, and meal coupons

Orientation phone calls

Before the first codesign session, every codesigner received a phone call from their staff co-facilitator who reviewed the purpose of codesign, discussed the virtual meetings and the need for online access, and answered codesigner questions. This was the first time we offered to provide technical support and identified any codesigners who would need equipment (an iPad) provided by our project to participate.

| COMMUNICATION | MEETING NORMS AND ICEBREAKERS | INCENTIVE PAYMENTS AND MEAL COUPONS |
|--|--|---|
| <ul style="list-style-type: none">• In our first codesign session, we asked our codesigners about the best ways to communicate and settled on using email and text communication for everyone.• We limited communication to topics relevant to the codesign sessions and kept texts and emails brief.• We sent out weekly text reminders a couple of days prior to each codesign session to remind codesigners of the upcoming meeting and whether they had any assignments to complete. | <ul style="list-style-type: none">• At the first codesign meeting, each codesign team discussed meeting norms, such as punctuality and being respectful to fellow team members. Each team came up with their own set of norms.• We initially built icebreakers with suggested topics into many of the codesign session plans. Over time, some teams kept them in and adapted them, while others substituted different icebreakers or chose not to use them. | <ul style="list-style-type: none">• Codesigners were paid for attending codesign meetings online. Each state distributed incentive payments differently. In Washington, codesigners received cash, while in Georgia they were paid via electronic cards (ClinCards). Each method had benefits and challenges.• We also gave codesigners grocery store gift cards in lieu of the shared food we would have provided at in-person meetings. This was meant to create a sense of camaraderie and lessen the inconvenience of attending a meeting right after work while hungry and tired. |

3.6 Hold regular codesign sessions

Questions to consider:

- How many days/weeks/months do you want to spend on codesign?
- How often will your codesign team(s) meet?
- How long will sessions be?
- What time of day and day of week make the most sense for your codesigners?

From the field:

ENSPIRE had codesign sessions weekly, over 10 weeks

| QUESTION | ENSPIRE'S APPROACH |
|--|---|
| How many days/weeks/months do you want to spend on codesign? | 10 weeks, including an extra buffer week. <ul style="list-style-type: none">• The extra week was intended to be a make-up session if any teams had to cancel a previous meeting. This was still during the intense period of the COVID-19 pandemic, so we anticipated having at least one week when all codesign members on any given team might become sick – this would allow us to cancel a week and still stay on track.• The extra week also allowed us to build more time into the schedule for the communications team to complete their very complex work of creating multiple communications products (10 in total) for the 5 teams. |
| How often will your codesign team(s) meet? | Weekly |
| How long will sessions be? | 2 hours, with a couple 1-hour meetings |
| What time of day makes the most sense for your codesigners? | Early evening |



4. PRODUCING AND SHARING YOUR CODESIGN PRODUCTS

4.1 Make decisions about design and production

Questions to consider:

Identifying options and selecting products

- To what extent will you defer to codesign teams about which products they want to design?
- What parameters, if any, do you want to set in advance? Parameters could be related to your budget, the feasibility of sharing particular types of products with the target audience, prior knowledge of the target audience's preferences regarding types of products or ways of accessing information, or prior knowledge about the effectiveness of particular products based on earlier projects or research.

Editorial and production assistance

- If there will be written products, who will do the final writing and editing to avoid errors?
- Do you need a subject matter expert to review the accuracy of the information provided in written products?
- Will you have professional production support for any materials that are created through codesign? If so:
 - What is your plan and timeline for collaborating with the production team?
 - What codesign curriculum materials, such as a creative brief, do you need to prepare with their help to ensure codesigners can provide what the production team needs and vice versa?
 - What training do you need to provide or what conversations do you need to have with the production team to ensure they respect the codesigners' autonomy and creativity?

Matching products to target audience

- What do you know about how and where your target audience accesses information?
- What format works best for the kind of information you want to share and for your objective in sharing the information?

Using copyrighted material

- Are there copyright issues you need to consider? This can be particularly important when selecting music.

Production timeline considerations

- What is your timeline for production? How does that timeline influence the types of products your codesign teams can develop?

From the field:

ENSPIRE identified products, team members, and support staff to help with production

Identifying options and selecting products

We offered codesign teams a menu of types of products based on our production timeline, budget, and project goals. These included posters, brochures, videos, and giveaway options (such as stress balls and hand sanitizer). As part of exercises conducted during codesign sessions, teams devised their messages and selected products they felt would be most compelling to their communities.

Editorial and production assistance

The communications production team developed a creative brief for codesign teams to fill out to inform the production team about what to produce. The creative brief asked the codesign teams to provide the following information and materials:

- Production schedule
- Text/storyboard (keeping in mind certain word limits)
- Color preferences
- Photos, videos, and music from iStock if desired

The creative brief also included templates for the different products. These templates served as “guardrails” that teams could follow when developing their ideas so that the codesign products could be produced quickly and within budget.

See ENSPIRE's
creative brief.



Matching products to target audience

We spent time during codesign sessions discussing where long-term care staff get information, and what is trusted. This informed the selection of products. A back-and-forth conversation between co-facilitators and codesigners in each group narrowed the selection of which products to finally create.

See ENSPIRE's
curriculum for
more on the
codesign
sessions.



Using copyrighted material

In ENSPIRE, we used publicly available background music. We were also careful to ask codesigners to complete photo releases for any personal photos they chose to include in final products.

Production timeline considerations

When creating giveaway items (stress balls, hand sanitizer), we considered not only how long production would take to develop materials, but also what factors could impact production, such as the availability of the base products. This was particularly important given potential supply chain issues.

4.2 Share your products

Questions to consider:

- What kinds of conversations can you have with partners way in advance so you can adequately plan for sharing and disseminating your codesign products?
- What is the “call to action” for your audience? How does this influence how, when, and where you will share the codesign products?
- What options are available for sharing different types of communications products?
- What are the most feasible options according to those tasked with sharing products?
- Will materials be actively shared in meetings? Or will they be posted or left available for people to pick up?
- How do avenues for sharing impact details about your products (for example, how do the areas available for displaying posters limit your poster sizes)?

From the field:

ENSPIRE included codesigners as partners for sharing and dissemination

- As part of our research project, we partnered with administrators at long-term care centers in our dissemination efforts. We met with administrators shortly after the codesign sessions finished and asked them to commit to specific strategies for sharing the codesign products.
- In retrospect, we could have had administrator conversations about dissemination strategies before starting codesign – this would have helped us better tailor products to realistic options for dissemination.
- One session of codesign included brainstorming about the best ways to share the products in the codesigners’ workplaces. It also included specific commitments from codesigners about how they, as individuals, could support dissemination.
- Dissemination is the final, very important activity that ensures your products will reach your audience. **Don’t leave it up to chance.**



5. EVALUATING YOUR CODESIGN

Questions to consider:

- How will you decide how well your codesign worked?
- Do you want to do a structured evaluation?
- Which aspects of your codesign do you want to evaluate? For example, do you want to evaluate how well your codesign functioned and felt for participants (process evaluation), or how well it worked to change behavior (outcome evaluation), or both?
- What kinds of resources (time, funds) do you have for evaluation?
- How would an evaluation be used by yourselves or others? How does your answer to this question help you decide what kind of evaluation to do?

From the field:

ENSPIRE did a detailed process evaluation of our codesign

Our evaluation assessed a range of questions relating to our codesign methods and process. We gathered data from co-facilitator meetings and debriefing sessions as well as codesigner surveys and interviews.



How well did our codesign process work?

Data source: Weekly meetings where co-facilitator pairs shared their observations with other co-facilitators

Questions included:

- What worked well during this codesign session?
- What were the biggest challenges during this codesign session?
- Were there any contextual or interpersonal factors that appeared to affect participant engagement or group dynamics?
- Did we do all activities as planned? If not, what did we change and why?
- Do we plan to do anything differently for our next session? What will we change and why?
- If anyone missed the session this week, what was the reason for their absence (if known)?
- Is there anything else that we would like to share regarding this codesign session or the whole codesign process so far?



How did co-facilitators feel about their own involvement?

Data source: A debriefing session with all community co-facilitators soon after the end of codesign

Questions included:

- What went well when implementing codesign?
- What was challenging?
- What interest would you have had in participating in more planning and design work?
- How well do you think the concept of having a staff and community co-facilitator pair worked?
- Overall, how would you describe your experience?
- What were your thoughts about doing this in teams organized by racial/ethnic identity? What worked well? What was problematic?
- In terms of timing, what did you think about being brought in very close to the launch of codesign sessions?
- How did the logistics work for you? How was scheduling? How did the technology work for you?
- How well did the orientation and training sessions prior to codesign work?
- How well did the meeting structure work for planning and debriefing?
- How would you like to be involved moving forward?



What were codesigners' experiences with codesign?

Data source: Short online surveys of codesigners after sessions 5, 7, and 10

The surveys used a 5-point Likert scale (ranging from 1 = strongly disagree to 5 = strongly agree).

The following statements were used to solicit feedback on group norms (for example, showing respect for others), content, and overall experience:

- I felt like my ideas were respected by my group.
- I enjoyed participating in the discussions.
- My facilitators made the sessions fun.
- I think the content shared during these sessions was useful to the goal of codesign.
- I'm proud of what we accomplished during these sessions.

We also asked open-ended questions so codesigners could provide additional feedback:

- What went well in the session?
- What would you change about the session?
- Other comments?

Data source: Individual interviews conducted with codesigners 3 months after codesign

Each interview was conducted by a staff facilitator who had the same racial/ethnic identity as the codesigner but who had not facilitated their codesign team. Interview topics included:

- Decision to join codesign
- Experience as a codesigner
- Perception of own racial/ethnic identity, especially as it related to organization of teams
- Perception of and satisfaction with final codesign products
- Codesign engagement, including facilitation and activities
- Effectiveness of codesign support (food, incentives, devices)

See ENSPIRE's
codesigner
interview guide.



Some highlights from our evaluation

Our evaluation showed that co-facilitators were successful leading codesign partly because they trusted participants to take the design lead, ensured balanced participation, and created a comfortable environment for sharing, where all opinions were respected.

Co-facilitators also provided guidance to stay on task, organized the sessions, answered questions in real time or later, provided clarification, and took good notes for future reference.



Michelle Man et al. "Implementing and evaluating co-design: A step-by-step toolkit," New Philanthropy Capital, npproduction.wpenginepowered.com/wp-content/uploads/2019/07/Co-design-guidance-July-2019.pdf, accessed October 29, 2024.



6. RECOMMENDATIONS BASED ON LESSONS LEARNED

Codesign can result in a new or adapted program, a product, a campaign, or many other tangible items. Additionally, codesign has an impact on the people who participate. In ENSPIRE, we learned from doing the codesign with our teams and from conducting a rigorous evaluation with codesigners.

Here are some takeaways. Each includes a lesson learned, an action item, and a quote from our codesigner interviews (when available).

Codesigner contributions

Lesson learned: Codesigners were proud of their specific contributions to the content, messaging, and images included in the final products.

Action: Offer several ways that individuals can contribute to the product: words, ideas, images, music. If you use homework to gather input, make it easy for codesigners to share content/materials with facilitators.

“ A lot of the wording was mine. The video, the verbiage on the video I came up with. There was only one slide toward the end that I was struggling with the wording and we all collaborated on. But when we went over what I came up with, they were all like, ‘Sounds good.’ The theme that we ended up with was one that I had tossed out. So, I think I had a pretty good influence on how we steered the team, but they took the ball that I tossed and everybody ran with it. So, it wasn't just all me. I'm very humble about this. It was definitely a joint effort, but I think I had a nice strong influence on the direction that we went.”

Lesson learned: Some codesigners shared that they felt nervous about how they would fit with the group or what they could contribute. They felt more comfortable after getting to know the other codesigners and seeing their ideas incorporated in the codesign process.

Action: Plan activities to break the ice at the beginning and potentially continue team-building exercises in later sessions depending on how long your codesign runs.

“ It was really the fact that I felt like I was making a difference, like we were doing something really cool. Like I said, I was really nervous about it, but after the first session and getting to know everybody and then really starting to see it kind of come together, that made it easier.”

Personal benefit to being involved in codesign

Lesson learned: Codesigners learned information useful to themselves, their families, and their friends, and felt like they were making a difference. They also felt less isolated and more connected, and enjoyed the activities they did together.

Action: Considering that codesign is unfamiliar to many people, it could be helpful to mention some of these benefits when inviting people to join the codesign project.

Lesson learned: Hearing the stories and experiences of others helped codesigners feel encouraged and connected after going through the pandemic and feeling isolated. This concept has been described as common humanity in the mindfulness literature – the sense that others are experiencing similar struggles, so you aren't alone.

Action: Build in enough time for codesigners to share with one another.

“ Working with the team, you listen to some of those stories that they've gone through – and a good number of them have had COVID, too – we had similar thoughts. It felt like we were kindred spirits, because a good many of them had COVID or had family members that had it. So, I felt that what we were doing was positive for us and to get the word out to other individuals.”

Lesson learned: Our codesigners liked getting to know each other, and some stayed in touch after codesign. They appreciated meeting staff who worked at other long-term care centers, having the chance to hear how others were doing and laughing together.

Action: Recognize that some codesigners may form friendships – if you create a welcoming atmosphere, you don't have to do anything to make friendships happen!

“ The atmosphere was just made comfortable. The moment that you walked in, you were not intimidated. It was a relaxing and welcoming invite coming into the Zoom. It was 'hellos, tell us something about yourself.' I think once or twice it was reflecting on something that happened during your day that was positive. It was never the same opening every codesign – it was something different, something positive you did yesterday, or what you thought or whatever. So, just coming into it, it was kind of a laid-back 'we want you to vent, open your mind, feel free, come in and join and relax.' So, I definitely enjoyed the codesign.”

Lesson learned: Codesigners in ENSPIRE appreciated learning from each other and hearing each other's stories.

Action: Ensure there is ample time for interaction and co-learning rather than including a lot of content that is presented or taught by facilitators!

“ The fact that all of us got to tell a little piece of our story, what we went through during COVID, whether it was that person got COVID or someone they loved got COVID – we got to tell those stories and then go back to our communities and give those pamphlets out. So, again, the coworkers could see what we went through and why we got vaccinated and got boosted. If it just encouraged one or two people, that's a lot to me, because that could save somebody's life.”

Input from others not on your codesign teams

Lesson learned: Codesigners who are passionate enough about a health issue to choose to participate in codesign may not be representative of the target audience. In a project focused on designing materials, codesigners can benefit from peer input during the design process. This step could increase the impact of the materials.

Action: Create activities during which codesigners can gather input from their peers, such as our peer interview activity. You may also want to test your products with focus groups before mass dissemination of a final product.

See "Session 2" in the ENSPIRE curriculum to learn about our peer interview activity.



“ I do believe we had one homework assignment to find out about our family, why they did not want to be vaccinated. That, to me, opened up my eyes when I asked my kids, ‘Why don’t you guys want to get vaccinated?’ So, I enjoyed that as well.”

Skillful and compassionate facilitation

Lesson learned: Facilitators can create a collaborative and supportive environment for dynamic creation during codesign. Participants described how the facilitators created space for the team to share opinions and work together on the design without “interfering” in the work of codesign. This led to the codesign participants feeling that they truly did the work (as compared to only being consulted).

Action: Develop a curriculum in which facilitators share background and goals (that are jointly developed with communities when possible) and leave the creating to the codesigners.

“ They would lead the discussion, but they wouldn’t take over. They let us then do the discussing and the designing and stuff. So, they were there just to keep us on track and keep us going, but they let us do the work.”

Lesson learned: Facilitators ensured participation from codesigners who had varying opinions and comfort levels with contributing in a group setting. Codesigners’ opinions and ideas were solicited, respected, and incorporated into the codesign products.

Action: Create a respectful space for all to contribute – even when opinions differ. Co-creation of group agreements at the beginning of the first codesign session can help with this.

“ The way that they handled this one made it so somebody like me wanted to continue to come and socialize and express their feelings toward things or express their ideas. I think that’s really important, and they should keep doing that – making it a safe place for people to go to bounce ideas off of. Because for something as controversial as the COVID vaccine, it can get heated, and I think they did a really good job making sure that everybody respected each other.”

Lesson learned: Work must get done. Facilitators provided guidance by keeping codesigners on task, organizing the sessions, answering questions, providing clarification, and taking notes.

Action: Use written curricula, audio-visual materials, and an accurate clock to stay on schedule. Be sure to thoroughly explain the process and goals up front, including the intended products, so codesigners have a framework in which to function.

“ They were really good about keeping us all on track, keeping some of the things to the front of our heads about this is what we're doing and keeping us from getting down a rabbit trail. But they also had a lot of really good thoughts and things and stuff for us to brainstorm about. They did a great job about keeping us where we needed to go, so we could wrap it up in the timeframe that we needed to, because we could have easily ended up down multiple trails and not accomplished anything.”

Lesson learned: Specific activities during sessions can keep codesigners engaged. These could be icebreakers, peer interviews, role-playing, or scavenger hunts. Such activities work both in person and online.

Action: Include engaging activities in each session and vary the format from week to week.

“ We did a virtual scavenger hunt which was kind of related to COVID – one of the items was hand sanitizer – but, again, who would have thought in a project like this we would have done a scavenger hunt? But believe it or not, everyone literally got up and ran around the house like chickens with their heads cut off, trying to participate. So, that's a prime example of some of the thinking-outside-the-box ideas that we had going on.”

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