

COCREATE

Co-Creation for Research Action Planning Tool

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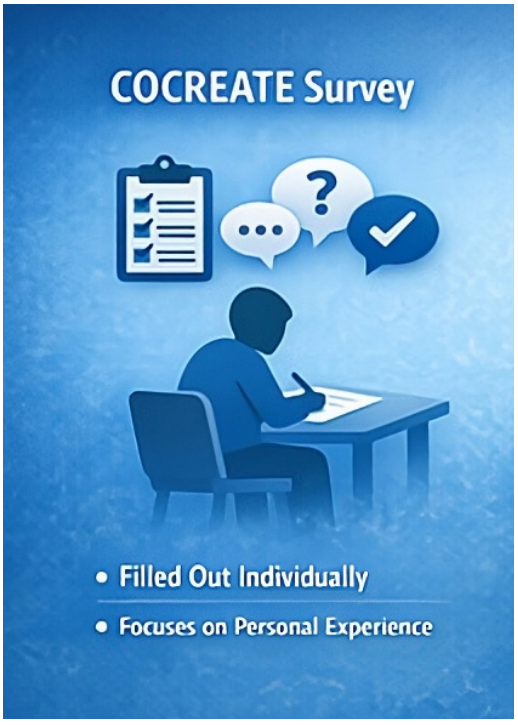
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Introduction

Two Tools, One Mission

Co-creation in research draws from the experiences of community members, patients, caregivers, clinicians, and practitioners to ensure that research interventions address real needs and fit local contexts. This COCREATE Action Planning Tool, alongside the COCREATE survey, provides a practical and partner-friendly resource that helps research teams plan, strengthen, and reflect on their co-creation practices. It is designed for partnerships that want to work together equitably and translate co-creation principles into concrete, shared action steps.





Co-Creation

What is Co-Creation in Partner-Engaged-Research?

> "A research partnership involving an equitable, collaborative process reflecting collective goals, knowledge and perspectives."

Why is Co-Creation Important?

1. **More Relevant and Contextually Appropriate Interventions**
   Co-creation integrates the experiences of patients, community members, and practitioners, ensuring that interventions address real needs and fit local contexts.
2. **Increased Stakeholder Engagement and Participation**
   Collaborative processes foster greater buy-in, trust, and sustained engagement among partners involved in the research process.
3. **Improved Creativity and Innovation**
   Diverse perspectives brought together through Co-creation promote creative problem-solving and generate innovative approaches to complex public health challenges.
4. **Empowerment of Communities and Participants**
   Collaborating with partners in research promotes empowerment and ownership over interventions and decisions.
5. **Higher Validity and Quality of Research Findings**
   Partner input improves construct validity by ensuring research questions, measures, and interpretations reflect lived experiences.
6. **Greater Implementation and Uptake of Findings**
   Interventions developed collaboratively are more likely to be adopted and sustained because partners help design them and feel ownership over the outcomes.

Who is Involved in Co-Creation?

- Community Leaders
- Patients
- Caregivers
- Patient Advocacy Organizations
- Healthcare Providers
- Researchers

Using the COCREATE Action Planning Tool in Research

Examples of implementing the co-create Action Tool and survey

EXAMPLE 1

Action Planning Tool Used First

(Planning Tool → Later Survey Check In)

A community health center is launching a new diabetes prevention program with patients, clinicians, and community advocates. Before starting the work, the group uses the COCREATE Action Planning Tool to agree on how they will share decisions, rotate facilitation, and ensure everyone has the resources they need. After several months, they use the COCREATE Survey as a "temperature check" to see whether partners feel the plan is working and where adjustments are needed.

EXAMPLE 2

Survey Used First

(Survey → Planning Tool to Refine)

A research team and caregiver partners have been working together for six months. They take the COCREATE Survey first to understand how partners feel about communication, fairness, and influence in the project. Survey results show that some partners feel their ideas aren't shaping decisions, so the group uses the Action Planning Tool to create targeted steps—like rotating meeting roles and adding structured time for partner-led agenda items—to strengthen co-creation going forward.

STEP 1: *Discuss Co-Creation Principles*

As a group, review the co-creation principles in the table below and choose a few to focus on. You do not need to address every principle at once: focusing on two or three priorities is encouraged.

TABLE 1: Principles of Co-Creation in Research

Co-Creation Principle	Example Action Items to Consider	Why This is Helpful
1 **Equity in Relationships Without Hierarchy**	• Work together to define what "fair working conditions" look like for your group. • Use non-hierarchical words like conveners instead of leaders. • Talk openly about who has power (formal or informal) and how to balance it. • Pause regularly to check whose voices are missing. • Create a shared leadership structure, like rotating facilitators. • Recognize lived experience and cultural knowledge as valuable as scientific expertise.	• Helps prevent certain people or groups from having too much influence. • Shows that everyone's knowledge—community, lived, professional—is valued the same. • Supports shared decision making rather than top-down control.

TABLE 1: Principles of Co-Creation in Research con't.

Co-Creation Principle	Example Action Items to Consider	Why This is Helpful
2 **Access to Resources Needed for Engagement**	• Ask partners what they need (materials, support, accommodations) to participate fully. • Offer different ways to join and share (chat, writing, verbal, phone, virtual, in person). • Provide information in clear, accessible formats. • Include cultural needs (such as speaking order) in meeting plans. • Seek out resources to help with technology, transportation, childcare, or scheduling when needed.	• Ensures everyone can take part meaningfully. • Removes barriers related to language, disability, culture, or logistics. • Gives people what they personally need to participate—fair doesn't always mean equal.
3 **Mutually Beneficial Engagement**	• Have a conversation about what "value" means to each partner. • Regularly check whether each partner is getting something meaningful out of the work. • Invite all partners as co-authors or co-presenters (as appropriate). • Regularly check in to understand if partners' needs and goals are being met.	• Prevents situations where only researchers benefit from the work. • Makes sure everyone gains something (recognition, learning, impact). • Keeps people committed because their needs and goals are respected.
4 **Safe Spaces During Engagement**	• Start meetings with personal check-ins to build trust. • Ask partners what helps them feel comfortable speaking openly. • Use a rotating "observer" to notice how the group is feeling and participating. • Normalize disagreement and honor different communication styles. • Collaboratively create living group agreements (respect, confidentiality, listening). • Set aside time in each meeting for open, judgment-free feedback.	• People share more honestly when they feel safe. • Encourages creativity and healthy disagreement, which strengthens the work. • Helps protect people who have experienced harm or bias in other settings.
5 **Ongoing Reflection of the Partnership**	• Meet regularly to reflect on trustworthiness, communication, and how decisions are made. • After major decisions, talk about what went well and what didn't. • Ask partners to confirm whether summaries and interpretations are accurate. • Keep a living agreement that can change as the group learns. This could be part of the shared governance. • Hold regular reflection conversations (e.g., monthly) to monitor progress and processes for working together.	• Moves the group forward continuously instead of repeating the same issues. • Clears up problems early before they become bigger. • Builds trust because members see their feedback turn into real change.

TABLE 1: Principles and Considerations con't.

Co-Creation Principle	Example Action Items to Consider	Why This is Helpful
6 **All Members Influence Research and Bring Different Knowledge Types**	• Work together on all parts of the research (drafting, interpreting, designing, implementing disseminating). • Invite partners to shape the questions, study design, conduct and final products. • Support partners in suggesting new project ideas. • Use multiple types of knowledge throughout the research.	• Allows the work to reflect the actual needs and experiences of the community. • Prevents tokenism by partners exerting influence, not just offering "input." • Makes the research stronger and more accurate by using many forms of knowledge.
7 **Sustainability of the Partnership (if Relevant to Co-creation Endeavor)**	• Plan regular relationship-building activities (meals, social events, check-ins). • Communicate in both personal (e.g., asking about weekend plans) and professional (e.g., focusing on the project) ways. • Develop structures like consortia or rotating leaders for a sustained partnership. • Keep relationships going even when funding ends. • Recruit new members to keep the group strong. • Welcome new members with thoughtful onboarding. • Document processes to help new people understand the work. • Create a long-term vision and revisit it each year. • Seek diverse and ongoing funding sources.	• Builds long term trust and makes the partnership more authentic. • Helps the group stay strong even when members leave or funding shifts. • Supports continuity so the group doesn't have to start over every time.

STEP 2: *Develop SMART Objectives to Address Co-Creation Principles*

SMART goals help partnerships turn ideas into clear, shared action steps to meet Co-creation objectives. They provide a way for the group to check in on progress, reflect on how well actions are supporting co-creation principles, and adapt plans as the partnership evolves.

SMART objectives are a set of goals characterized as being **S**pecific, **M**easurable, **A**chievable, **R**ealistic/**R**elevant, and **T**ime-Phased (See Table 2 for information on these elements). They are not to evaluate individuals or measure performance. The partnership should link specific, measurable objectives to the goals identified.

TABLE 2: Tips to Create SMART Objectives for Co-Creation Action Planning

S **Specific**	• Clearly describe what the partnership will do to better align with a Co-creation principle. • Objectives should focus on what the group will do together (for example, how meetings run or how decisions are made), not on how people are supposed to feel. • Formulate the objective in concrete, detailed, and well-defined terms to clarify expectations. • Use concrete action verbs such as develop, agree on, adopt, implement, review, or revise. • Avoid using verbs that may have vague meanings (e.g., "understand" or "know") since the objective may then prove difficult to measure.
M **Measurable**	• Identify how the partnership will document/ determine when the action was completed. This may include observable changes (e.g., a written agreement, a new meeting practice, number of check-ins held, or roles rotated), documentation (notes, plans, guidelines), or frequency (e.g., monthly, quarterly).
A **Achievable**	• Make sure that the objective is realistic given the partnership's time, energy, and resources. • Actions should be feasible within existing meetings or workflows and should not require specialized expertise or additional funding unless explicitly planned.
R **Realistic/ Relevant**	• The objective should clearly relate to the Co-creation principle the partnership is working on and address areas identified as strengths or opportunities for improvement. Ask: Will this action meaningfully improve how we work together? • Given the partnership constraints, determine whether the objective is achievable.
T **Time-Phased**	• Include a clear timeframe indicating when the action will occur or be completed (e.g., by the third meeting, within six months, by the end of the project year). Timeframes help partnerships move from discussion to action and revisit progress intentionally.

EXAMPLE 1

Principle 1 – Equity in Relationships without Hierarchy

Not-so-SMART objective:
Create a more equitable and non-hierarchical partnership.

Why it's not SMART: vague, no action, no timeframe, no way to tell if it happened.

SMART objective:
By the third partnership meeting, the group will adopt shared language guidelines (e.g., "conveners" instead of "leaders") and implement a rotating facilitation role, with at least three different members facilitating meetings by the end of the first project year.

EXAMPLE 2

Principle 7 – Sustainability of the Partnership (if relevant)

Not-so-SMART objective:
Build a sustainable long-term partnership.

Why it's not SMART: vague, no action, no timeframe, no way to tell if it happened.

SMART objective:
By the end of year one, the partnership will develop a written sustainability plan that includes member onboarding practices, communication norms, and at least two potential strategies for continuing collaboration beyond the current funding period.

Template 1: Designing SMART Objectives

Directions: Complete this form to transform goals into SMART goals into SMART objectives! To do this, respond to the questions listed under the Key Component column.

Not-so-SMART Goal 1:	
Key Component	**Objective**
S **Specific** What is the specific implementation strategy?	
M **Measurable** How much change is expected?	
A **Achievable** Can the implementation strategy be feasibly implemented?	
R **Realistic/Relevant** Given constraints, can the implementation strategy be completed?	
T **Time-Phased** What are the start and end dates?	
SMART Objective 1:	

STEP 3: *Turn SMART Objectives into Action Plans*

Template 2: Creating an Action Plan

Directions: Take the SMART objective you created above and use this template to document the actions the partnership will take to strengthen co-creation practices. The template focuses on how the group will work together to align with selected co-creation principles. Partnerships may complete one Action Plan Template for each SMART objective. Modify categories and add rows as needed to fit partnership needs. Collaborate to make sure that there isn't too much burden on any partner. This action plan should be revisited and adapted as the partnership learns and evolves.

Partnership Name:	**Partnership Convener(s) or Point of Contact:**	**Date:**
Partnership Team Members:		**Others Involved (if applicable):**
Co-Creation Principle:		**Duration of Action Plan:**

Objective(s)	Action Steps/ Activity	Who is Involved?	By When?	Resources or Supports Needed
1	A.			
	B.			
	C.			
	D.			
2	A.			
	B.			
	C.			
	D.			
3	A.			
	B.			
	C.			
	D.			
4	A.			
	B.			
	C.			
	D.			

STEP 4: *Evaluate your Partnership with the COCREATE Survey*

COCREATE Survey Engagement Measure

This measure is designed to assess partner research experiences when individuals are engaged in a highly collaborative process (co-creation), not as study participants but as partners/members. Co- creation in engaged research refers to "a research partnership involving an equitable, collaborative process reflecting collective goals, knowledges and perspectives." See the COCREATE Action Tool for more information on terms, and on how to use the COCREATE action tool to structure your research partnership group as a Co-creation partnership.

Key Features of the COCREATE Survey

- **Purpose:** Evaluates the experiences of individuals who are engaged as partners/members in research or program evaluation projects
- **Measurement:** Overall scores are calculated as a mean, reflecting the level of agreement on high quality co-creation partner engagement experiences.
- **Versions:** We offer an abbreviated 8-item measure and a comprehensive 19-item measure.
- **Audience:** Can be completed by members of a research partnership group such as community members (e.g., partners from patient advocacy organizations and community leaders), patient partners, healthcare providers/staff, or researchers.

TABLE 1: Psychometric Properties of the 8-item and the 19-item Survey Versions

Feature	8-item Abbreviated Version	19-item Comprehensive Version
Items	8 short items, rated on a 7-point Likert scale (Strongly Disagree to Strongly Agree)	19 short items, rated on a 7-point Likert scale (Strongly Disagree to Strongly Agree)
Psychometric Properties	The 8-item COCREATE measure demonstrated high internal validity overall for standardized Cronbach coefficient (0.85), and within scales from 0.61 to 0.89	The 19-item COCREATE measure demonstrated high internal validity overall for standardized Cronbach coefficient (0.94), and within scales from 0.73 to 0.94

Pragmatic Qualities:

- No specialized training is needed to administer, score, or interpret the measures.
- Cut-off scores for interpretation not yet available; however, higher scores indicate greater acceptability, appropriateness, or feasibility.
- Norms not yet available.
- There is no cost to use these measures.
- Time to complete for the 8-item version: less than 3 minutes per measure.

Scoring instructions are available in the survey document, SAS and excel template, and website.

FAQs

COCREATE Action Planning Tool Frequently Asked Questions (FAQs)

COCREATE Action Planning Tool

1. **What is the tool?**
   The tool helps partners talk about what matters most to them and plan for how they can best work together. The goal is to help strengthen co-creation partnerships.
2. **When should the tool be used?**
   The tool should be used at the start of a Co-creation process and again at key points throughout the project.
3. **How is the tool different from the survey?**
   The tool is intended for use alongside the survey. The tool is used by the group together to action plan how they will meet the goals of co-creation (e.g., sharing decision making, making sure everyone benefits, giving everyone the resources they need to participate, and treating partners fairly). The survey is filled out by each person on their own. The survey checks how people feel about the co-creation process and how well it is going.

COCREATE Survey

The COCREATE Survey is a PCORI-funded Science of Engagement validated measure that your team can use to assess partner experiences during their engagement process when they are engaged as collaborators or "co-creators." We offer comprehensive and abbreviated versions of the survey.

1. **What is this survey about?**
   This survey asks about your experience working as a partner on a research project. It focuses on how people work together, share ideas, and make decisions.
2. **Why is this survey important?**
   The tool should be used at the start of a Co-creation process and can be used again at key points throughout the project.
3. **Is the survey offered in other languages?**
   Yes. The survey is available in English and Spanish.

Disclosure: This FAQ was created with the assistance of Microsoft Copilot.

Resources

How to Cite this Action Tool

Ostendorf, D., Tufte, J., Willging, J (2026, May).
COCREATE: Co-Creation for Research Action Planning Tool.

General Resources

1. Stakeholder Engagement Navigator: https://DICEmethods.org
2. PCORI Foundational Expectations for Partnerships in Research | PCORI Rocky Mountain Public Health Training Center (RM-PHTC): https://www.rmphtc.org/
3. CIRTification: https://training.ccts.uic.edu/Course/CourseDetails.aspx?CourseID=3
4. Collective insight: https://share.google/EwLST7P247oLxG87C

Resources for Patient/Community Partners

1. https://www.cochrane.org/learn/courses-and-resources/evidence-essentials
2. Web-based Toolkit Available to Facilitate Patient Engagement in Research: https://share.google/BU36KYdX8eAsyExZk

Examples

1. https://doi.org/10.7812/TPP/15-162
2. https://doi.org/10.7812/TPP/18-101

Authorships and Acknowledgements

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