

# When, why, and how to do co-production in wellbeing policy and practice

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## About the What Works Centre for Wellbeing

We are an independent collaborating centre and the aim of our work is to improve wellbeing and reduce misery in the UK. We believe that this is the ultimate goal of effective policy and community action.

By accelerating research and democratising access to wellbeing evidence, we develop and share robust evidence for governments, businesses, communities and people to improve wellbeing across the UK.

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# Introduction

Co-production involves bringing together stakeholders, practitioners, and technical experts in an area of policy<sup>1</sup> to collaboratively conceptualise the nature, objectives, metrics, and evaluation paradigms for that area (Sollis et al. 2021). It is a fundamentally participatory and deliberative practice that is often juxtaposed against more top-down, governmental, or bureaucratic practices (Fung 2015).

This methods paper analyses when co-production might be appropriate, why it is valuable, how to execute it, and what could go wrong. The methodology is illustrated with reference to a recent co-production exercise between people with a lived experience of financial hardship, the UK national anti-poverty charity Turn2us, and academics from the University of Cambridge, to develop a theory of 'thriving' that the charity is now applying throughout its operations<sup>2</sup>. The associated report<sup>3</sup>, and a draft academic paper outlining the exercise in greater detail<sup>4</sup>, are also available.

A motivation for writing this article is that 'how to guides' for co-production, and for participatory practices more broadly, are rare and embryonic. To our knowledge, no co-production guide exists for wellbeing specifically. Most expertise regarding how to run such exercises well is locked up in the minds of practitioners or consultants. Besides limiting the ability of interested parties to undertake co-production, this paucity of documentation also undermines our ability to evaluate what works in co-production and improve our methods.

We are hopeful that this methods paper will go some way towards alleviating this situation, but we are under no illusions. This is an incomplete guide and is doubtless naïve in many regards. We would welcome feedback on what we have written and hope that our efforts stimulate others in this space to catalogue their own insights in a public-facing manner. Our own experience of co-production is influenced by Abby Meadows, a knowledgeable and an exceptionally thoughtful chair of co-production at the national anti-poverty charity Turn2us.

## Contexts for co-production

Co-production is especially well-suited to highly 'value-laden' areas of policy where the definition of key terms, how they are measured and how policy is eventually evaluated, all require substantial value judgements to be made. Wellbeing policy is one such area (Haybron & Tiberius 2015). Wellbeing is what makes someone's life 'go well'. It is what is 'good for' them. Words like 'well' and 'good' alert us to the presence of value-claims.

A purely 'scientific' or 'technical' approach to such matters is impossible. Liberal-democratic norms and aspirations demand that the value-judgements inherent to working with terms like wellbeing be left to citizens (Alexandrova & Fabian 2022). But

1 This paper is written with both public policy and other forms of practice (e.g. private organisations, NGOs, community groups, etc.) in mind, but we will stick to the word 'policy' rather than 'policy and practice' for brevity.

2 Turn2us is a national charity in the UK that provides practical information and support to people who are struggling with money. It also provides direct financial assistance through a range of specific funds managed directly by the charity. Turn2us has a campaigning and policy arm that advocates for welfare and other policy reforms and a safeguarding team. Co-production is an integral part of all operations. For more on co-production at Turn2us see <https://www.turn2us.org.uk/Working-With-Us/co-production-and-involvement-at-Turn2us>

3 *Our Model of Thriving* <https://www.turn2us.org.uk/T2UWebsite/media/Documents/PDFs/Our-Model-of-Thriving.pdf>

4 Working Paper: A Coproduced Theory of Thriving for People Experiencing Financial Hardship [https://www.bennettinstitute.cam.ac.uk/media/uploads/files/Working\\_Paper\\_A\\_Coproduced\\_Theory\\_of\\_Thriving\\_for\\_People\\_Experiencing\\_Financial\\_Hardship.pdf](https://www.bennettinstitute.cam.ac.uk/media/uploads/files/Working_Paper_A_Coproduced_Theory_of_Thriving_for_People_Experiencing_Financial_Hardship.pdf)

good policy making requires more. Practitioners must be active participants in the conversation to ensure that whatever framework is developed for wellbeing policy is feasible and can be readily applied. Technical experts are also required to ensure that conceptualisations of value-laden terms are logical and their measures valid. Technical experts can also input into deliberations over value-laden policy, answering stakeholders questions to enhance judgements.

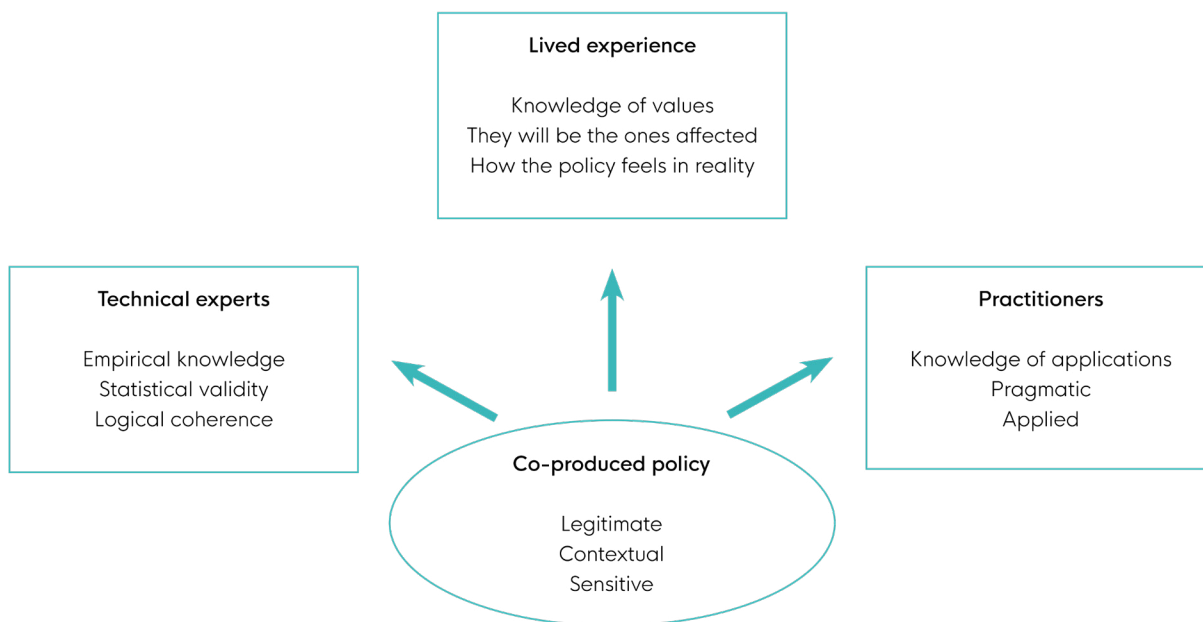
Co-production aims to facilitate the blending of three sources of expertise: citizens (people with lived experience), practitioners (applications), and technical experts or academics (rigour). It involves genuine power-sharing among these groups, especially with respect to decision-making (Daniels et al. 2018). It also goes beyond consultations or surveys, where policy makers have already substantially determined the structure of engagement and the questions to be asked of citizens. Co-production aims to engage stakeholders and ensure a two-way learning process.

In co-producing a town-revitalisation plan, for example, practitioners from the council and technical experts from a local university can learn what local citizens value most. In turn, those citizens can learn from the council how policies could be implemented, what budget constraints are in place and what governance processes need to be negotiated. From the experts, they can learn the likely economic consequences of particular revitalisation options, the costs associated with particular proposals, and whether there are any holes in how they conceptualise 'revitalisation', such as no long-term plan for investments or financing.

## Why co-produce?

There are three primary motivations for co-production: legitimacy, contextualism, and sensitivity (figure 1).

Figure 1: Model of the three primary motivations for co-production.



### Legitimacy

Politicians must justify their budget decisions to the people whose lives are affected in a way that is explicitly ethical, not just technical. Many areas of policy, wellbeing among them, require a range of value judgements to be made. Those most affected have a right to have their opinions taken into consideration over, or at least as well as, politicians, academics, the median voter, or high taxpayers (Degeling et al. 2015).

This can sometimes be difficult, particularly in cases such as dementia care or the wellbeing of newborns. But, where it is possible, co-production ensures that people have a voice in shaping policies that affect them directly. This is a way to revitalise civic life, encourage political participation, empower the grassroots, and forge respectful partnership across hierarchies, whether between workers and managers in organisations, or citizens and policy makers in governance.

### Contextualism

Conceptions and measures of wellbeing must be tailored to specific domains. This has both theoretical and practical advantages. The definitions of wellbeing are widely debated within academia (Alexandrova 2017, Fabian 2022) and views are typically informed by disciplinary backgrounds. Psychologists focus on mental states and how you feel; development practitioners and anti-poverty organisations place emphasis on basic needs and political enfranchisement; economists define wellbeing in terms of whether you can satisfy your preferences; philosophers, though rarely in agreement, are fond of accounts of wellbeing that consider whether one is living wisely and virtuously, as philosophers aspire to do.

A challenge for such 'all things considered' definitions of wellbeing is that how they manifest often vary by where they are applied (Alexandrova 2017). For example, one theme that is common to almost all accounts of wellbeing is health. But prioritising 'health' means different things for someone in a wheelchair, an expectant mother, a professional athlete, a retiree, or a diabetic. To apply wellbeing policy that prioritises the health of each of these groups requires 'contextualising' health to their specific needs. Co-production is a way to ensure that wellbeing policy is sufficiently tailored, both in terms of value judgements and the needs of practitioners in each context.

## Sensitivity

Sensitivity is related to contextualism – it refers to harnessing granular, context-specific knowledge to improve the effectiveness of policy in the affected areas. This is the main driver of present efforts across numerous governments to involve those with lived experience in policy making in a variety of domains (McIntosh & Wright 2019).

People who are directly affected by policy and 'street level bureaucrats' who deliver that policy often possess insights that an analyst or senior bureaucrat cannot glean from their data or the analytical tools at their disposal. Indeed, the metrics they focus on when evaluating policy may actively blind them to the nuances of what determines policy success and failure. For example, in unemployment policy, the objective and metric of is re-employment, end of story. But re-employment may require feelings of self-efficacy, improvements to mental health outcomes, assistance with navigating online job boards, guidance on how to re-skill, reliable child-care to improve timetabling flexibility, and a range of other variables that are too detailed and heterogeneous across individuals to turn up in a spreadsheet.

Co-production increases the likelihood that policy will not only be sensitive to these complexities, but actually incorporate them into design, measurement, and policy objectives. This increases the likelihood of good outcomes and the ability of policy makers to track progress.

## How to set up co-production

Before getting to operational matters, it is important to first underline that co-production will fail if it is merely used as a tokenistic way to platform people with lived experience. From our conversations with actors in this space, such tokenism is too common at present (Blacker et al 2021). We greatly welcome the objective of giving people with lived experience a greater role in policy making, and to amplify their voices and perspectives.

While this can result in people with lived experience being given a large audience to speak to about their lives, on its own this does little to produce a coherent or effective analytical framework for tackling complex policy challenges. It can also place a burden on people with lived experience to do policy makers' jobs for them.

Lived experience performs best when it is supported by well-honed questions, purposive processes, and powerful frameworks that can organise the insights of people with lived experience in a way that directly addresses knowledge and analysis gaps in policy. In our work with national anti-poverty charity Turn2us (Fabian et al. 2021), people with lived experience strongly requested sample questions and feedback that could shape their testimonies into usable information. These testimonies were then further structured by the academics and practitioners involved into a succinct and analytical model of thriving that could be straightforwardly applied by the charity.

### **Balancing 'conceptual saturation' with 'representativeness'**

Conceptual saturation refers to whether your sample of participants is diverse enough to capture the many nuances of your context and generate rich qualitative data for interpretation. It requires an intimate setting that facilitates genuine power sharing, in-depth dialogue, reflexivity, and two-way learning (Clark et al. 2019).

Representativeness refers to whether your sample reflects the composition of your stakeholders more broadly, which can require a large number of participants. It's possible that some stakeholders have particular experiences that are important to recognise and take into consideration. But if 90% of your stakeholders have a very different experience, this crucial fact should inform your policy planning. However having 90% of people with lived experience from this demographic would be representative but less useful because they will duplicate their inputs into the deliberations. So as a rule of thumb, have diversity at small scale with a focus on qualitative insights, and then check these quantitatively at large scale for representativeness.

How to balance conceptual saturation and representativeness will depend on the resources available to you. In a small to medium sized organisation, you might be able to have a small working group of a dozen people who deliberate and secure conceptual saturation, and then a firm-wide survey and/or survey of users that checks whether the outcomes of that working group resonate with the broader population.

A local council could similarly recruit a small group of interested citizens for a working group, but these are likely to be unusually active and invested members of the community. The council could complement this group's deliberations by commissioning a market research company to undertake a statistically representative poll of the council area's population to canvass its perspective.

The situation is likely to be very different for a nation-wide policy proposal like making infrastructure development more sensitive to wellbeing concerns. We will return to some of these scale considerations at the end of the paper.



## Recruiting stakeholder, practitioner and technical expertise

Once diversity and representativeness have been considered, the next step is to recruit the three kinds of expertise: stakeholder, practitioner, and technical. Like much of co-production practice, how this is done will vary by context.

Practitioners are people with the knowledge of the policy or the service you seek to co-produce. They are typically the easiest to recruit because they can be drawn from whatever body is organising the co-production. However, there will be times, especially when the scale of the policy area is large, that you need to think deeply about what practical insights you need to harness. Unemployment policy, for example, would need representatives from case workers, job centres, retraining services, and managerial-level bureaucrats, among others.

The main issue to consider when recruiting people with lived experience, beyond diversity and ethics, is whether they will be reliable members of the co-production process (Oliver et al. 2019). This goes for all participants in co-production, but is especially salient for people with lived experience because they will often be coming to an entirely new environment.

Securing people who have the time, capacity, temperament and drive to contribute is crucial to success. They should be compensated for their time and be properly credited for their contribution to the outputs of co-production. People who dominate conversation, impose their own perspectives, get side-tracked, attend irregularly, or can't articulate themselves will hamper co-production. This is true for all participants, not just people with lived experience. However, as co-production places a special emphasis on showing respect and deference to people with lived experience and sharing power with them, once they are in the process you should refrain from 'managing' them. As such, it is ideal to recruit people who manage themselves well

Recruiting technical experts might at first seem challenging. However, while wellbeing expertise is useful, the priority is to source expertise about technical matters that people with lived experience and practitioners might have questions about. For example, when co-producing wellbeing policy for a national park, it would be most helpful to have someone there with expertise around how greater volumes of visitors to that park will affect it aesthetically and biologically. Such expertise may already be available within or to the practitioner community.

## Turn2us theory of thriving: an example of the co-production process

As this can vary significantly by context, we will use our work with Turn2us on producing a theory of thriving as a baseline illustration and starting point to discuss other experiences.

Turn2us is a national charity representing a diverse base of service users. The audience for its grants is typically quite different from the audience for its helpline, online benefits calculator, and information programmes. As such, the charity cannot accept a theory of thriving that only reflects the experience of a narrow subset of these individuals.

Our five-stage process was designed to generate data and feedback in a way that balanced conceptual saturation and representativeness; we combined a core methodology of qualitative data collection in an intimate setting with quantitative surveys at the beginning and end of the process.

### Stage one: surveying

We surveyed 1,571 people who have previously or currently used Turn2us' services. We sourced these responses using Turn2us' monthly newsletter, which reaches around 5,000 former or current service users. The online survey consisted of demographic questions plus six questions concerning how service users conceived of the notion of thriving. Four of these were ranked-choice questions, such as:

Please rank the following items in terms of how much they resonate with what thriving means to you (leave blank any that do not resonate):

- a. Being in a positive mental state (good moods, satisfaction with life, happy, etc.)
- b. Being able to satisfy your desires and preferences
- c. Having income, health, education, and political rights
- d. Being free to decide for yourself how you want to live your life, feeling effective in your life, and having supportive social connections
- e. Being able to develop and express your unique personality

These ranked-choice questions were designed to assess the extent to which prominent theories of wellbeing from the academic literature mapped on to service users' conceptualisations of thriving. For example, in the question above, (a) corresponds to mental state accounts of wellbeing like subjective wellbeing (Sumner 1996, Frijters & Krekel 2021), (b) to preference satisfaction theories common in economics (Hausman 2015), (c) to the capabilities approach prominent in development studies and indigenous policy (Robeyns 2017), (d) to the three basic psychological needs of self-determination theory, one of the more prominent psychological accounts of 'eudaimonic' wellbeing (Ryan & Deci 2017), and (e) to nature fulfilment theories of wellbeing, which are common among philosophical accounts of eudaimonia (Haybron 2008, Besser-Jones 2014).

The two remaining wellbeing questions solicited open-ended responses. They were:

- What is the single biggest obstacle to your thriving?
- Is there anything that you feel your friends, family, colleagues, community, social workers or the government misunderstand about what would help you thrive?

The objective of this survey was to get an initial steer for the qualitative portion of the co-

production process. We wanted to ensure that we discussed issues that were of interest to the broad spectrum of Turn2us service users.

## Stage two: working group

We presented findings from the survey in the first meeting of the working group using charts and word clouds. The working group consisted of representatives from the three 'expert' groups: four people with lived experience, three academics, and five practitioners from Turn2us.

All people with lived experience involved at any stage of the co-production process were paid the London living wage of £11/hour for their time, including for reading and administrative tasks.

The primary activity of the working group was for members to interview each other one-on-one to gain an interpersonal understanding of what thriving means to people experiencing financial hardship, what practical needs Turn2us had from a theory of thriving, and in what ways existing thinking about wellbeing and its measurement could inform the theory of thriving we aimed to produce. These interviews formed the principal source of qualitative data for the project and underwrote discussions of thriving in all-participant working group meetings that further informed the theory.

The working group began with a three-hour meeting to outline the project, to discuss the survey results, to explain the administrative procedures associated with logging interviews, and to consider potential interview questions. An academic participant also provided some simple tips for good interviewing procedure, as requested by some of the participants. Many of the people involved asked for sample questions, so these were prepared by the academics and sent round in a separate document summarising all the interview tips (available in the full working paper).

Each working group member then interviewed at least one person from each expert group other than their own. For example, people with lived experience would interview at least one academic and one Turn2us representative. The project lead interviewed every member of the working group and listened to every other interview as part of transcribing them using speech-to-text software. In addition, the academics interviewed several staff at Turn2us who could represent parts of the organisation, such as safeguarding, that were not present in the working group to get a broad sense for the organisation's needs.

After a break of two weeks to give the academics time to complete an analysis, the working group had a second meeting of all participants. This was an opportunity to discuss the process so far. The academics presented their preliminary models of thriving based on their analysis of the data generated to date.

The models were well received, but the working group had not managed to make much headway on the question of how to measure thriving. This was put as a point of priority for a second wave of interviews that were conducted group-to-group rather than one-on-one. These meetings did not resolve the measurement issues, but they did lead to refinements of the model to the satisfaction of all working group members. This model was worked up into a preliminary report with oversight from the project lead at Turn2us.

## Stage three: half-day workshop

A half-day workshop was conceived as a way to inject greater representativeness into

the qualitative side of the project without logistically overburdening it. We invited an additional 10 individuals with lived experience of financial hardship to offer their thoughts on the preliminary report and deliberate with working group members on how it could be refined ahead of a final report. The event was inspired by consensus conferences from the deliberative democracy tradition (Anderson & Jæger 1999). The 10 new participants were selected primarily from demographics that were not represented in the working group.

To empower the people with lived experience from the working group, the academic and practitioner members encouraged them to take a leadership role in the workshop. This did not take the form of administrative tasks. Rather, the members with lived experience took on the role of facilitators, running the breakout rooms in the workshop and leading discussions. Academics and practitioners handled administration, logistics (notably IT), and scribing. By request, facilitators were sent a schedule and three pages of guidance on how to perform this role ahead of the workshop.

The 10 new participants with lived experience were sent the preliminary report to read two weeks ahead of the workshop. Three days prior to the event, they were asked to complete a brief five-question survey gauging their reaction to that report. This allowed the working group to flag some issues for discussion. The new participants were asked similar questions in a post-workshop survey alongside questions soliciting their satisfaction with the process.

The workshop began with a brief welcome and introduction session. We then moved into breakout rooms of three to four individuals to discuss the preliminary model, with new participants given priority to speak. This was followed by a break to avoid Zoom fatigue.

We returned for an all-in ('plenary') session to pool notes from each breakout room. There was then a presentation from a director at Turn2us on how the charity might use the theory being produced. It was hoped that this would be inspirational and demonstrate to co-production partners how much the organisation values the work they are doing.

After a long break, we went into breakout rooms and then a plenary session to discuss ways that the model could be improved. We then informed participants of how we would communicate the changes we had made in response to their suggestions before wrapping up.

By comparing responses to the pre- and post-workshop surveys, we can see that the deliberative exercise of the workshop, which involved two-way learning between the working group and new participants, served to alter the opinions of the 10 new co-production partners towards the preliminary report.

The discussion increased the extent to which new co-production partners thought the report reflected what thriving means to them, for all but one participant, who was nevertheless satisfied once the final online version of the report was produced.

## **Stage four: final report**

The fourth stage of the co-production process involved refining the report based on workshop comments to arrive at a final report launched in November 2021. Co-production partners were invited to the launch events to acknowledge their contribution to the report, involve them in the Q&A as authors, and show appreciation for their work.

## Stage five: feedback

The fifth stage, currently underway, will be to reach out again to all recipients of Turn2us newsletter with a survey asking for their feedback on the now public thriving report. This will allow us to check whether a more representative sample of service users endorse the report.

At this stage, we will seek only broad assent/dissent rather than detailed comments, but we will allow for open ended responses. If the broad base of service users is dissatisfied with the report we intend to restart the working group process, potentially with new co-production partners.

A Model of Thriving<sup>5</sup> was embedded in the report and is now being implemented in an organic way across Turn2us' operations. As this process matures, we hope to identify ways to refine the model, and also identify applications of it that lend themselves to measurement of thriving. Once we can observe the practical requirements of measurement in greater detail, we will likely commence a second co-production effort to develop and validate these measures.

## Guiding principles and challenges

### Selection of people with lived experience and practitioners

Selecting people with lived experience for our co-production exercise was a somewhat delicate balancing act and we were heavily reliant on Turn2us' experience. People with lived experience needed, first and foremost, to have personal experience of living with financial hardship and some sensitivity to the experiences of other people in similar circumstances. Ideally, they also needed experience of engaging with Turn2us or a similar charity. They also needed to have the time and flexibility to participate and have a disposition suited to participate in the exercise constructively and openly.

Due to the conditions of the Elizabeth Finn Trust, the original endowment that Turn2us administers, the charity works overwhelmingly with people from 'professional' backgrounds. These include service sector workers, like nurses, lawyers, and bureaucrats, as well as people with trades, such as plumbers or beauticians. As such, people with lived experience also needed to have such backgrounds. While we went beyond professionals for the purposes of the workshop, this extension was limited, and so the resulting theory of thriving may not speak to all experiences of thriving under financial hardship. Since our work was completed, Turn2us has embarked on a process of redesigning this fund in a way that is targeted at more marginalised groups.<sup>6</sup>

The four people with lived experience in the working group had some higher education attainment. To offset bias in perspectives that might have arisen from this fact, we selected people with lived experience with more varied educational and intellectual backgrounds for the workshop.

Recruitment was done through the standard process employed by Turn2us. The charity maintains a roster of people interested in co-production. Individuals are added to this as they come into the charity's orbit and potentially removed if they are not suited, for example if they have been rude or domineering in a co-production exercise. New co-

5 <https://www.turn2us.org.uk/T2UWebsite/media/Documents/PDFs/Our-Model-of-Thriving.pdf>

6 <https://www.turn2us.org.uk/About-Us/News/Elizabeth-Finn-Fund-Redesign-Weeknotes-02>

production projects are advertised to the roster by email calls for expressions of interest. Applicants are then short-listed and selected based on suitability. In our case, almost everyone who volunteered was included either in the working group or the workshop.

People with lived experience in the working group were aged late 30s to late 60s, two men and two women, three white and one black, with and without children, and with experiences of racism, disability, domestic violence, homelessness, and mental health issues. Two people with lived experience were social/care workers, another was a disability rights campaigner, and one was extensively involved in campaigning for socially excluded people, particularly the homeless, around London.

We wanted to ensure a wide variety of demographics were represented and did so through recruitment of workshop participants to broaden the group considerably. We brought in several young people aged 19 to 35, people with lived experience from across the geography of the UK, both rural and urban, people of varied sexualities, including two trans individuals, more people of colour, more parents, a person with autism, and people who had migrated to the UK from Europe in the past five years. New people with lived experience also had a diverse range of occupational backgrounds.

Participants from within Turn2us were selected primarily to reflect the variety of programmes the charity runs, and range of seniority levels. The working group was chaired by the head of co-production, who was joined by a caseworker from the grants team, the chief engineer for the benefits calculator, the director of communications, and a new hire who was consulting across Turn2us' operations. This core group included people of colour and individuals of varied economic backgrounds from across the UK.

## Using qualitative methodology in co-production

Overall, our research found a lack of established qualitative research methodologies that were suitable for our co-production approach. For the purposes of this project, we combined elements of different techniques and approaches.

### Generating data

As outlined above, we used interviews and a workshop/focus group to generate our qualitative data. Within these, we employed Fujii's (2017) 'relational interviewing' method. This has the following central features:

- Ensure that power is genuinely shared between the researcher and those researched, and that dialogue runs in both directions.
- Build a working relationship with interviewees that goes beyond 'rapport'.
- A culture and atmosphere of respect, dignity, and humanist values is crucial to ensure that people can be open to the sensitive topics in question.
- Respect different ways of knowing. People's wisdom comes from a variety of sources, such as personal experience, book learning, and learning by doing, and some work might need to be done to translate this wisdom such that it can be understood by others.
- The interview should be 'teller-focused' i.e. learning from the person with the

relevant experience, whatever it is that they think is relevant to tell.

- Reflexivity of all parties is crucial; participants must be aware of how their characteristics and behaviour impact the conversations had, and the data that emerges.
- Interviews should be based on some semi-structured questions, but active listening is in many ways more important. For two-way learning to take place, parties to the conversation must be able to respond to emotional cues and inhabit each other's perspectives.

In practice, we found that our co-production partners were very eager to receive (rather than generate) lists of semi-structured questions and tended not to venture much beyond these.

Interviews also typically, perhaps due to nervousness, fell into the form of one party taking on the role of interviewer and working through the question list, then swapping roles with their partner. There were few follow-up questions posed and the semi-structured questions rarely turned into launch pads for wider ranging discussions.

Nonetheless, in discussion at regular working group meetings, and in feedback we took at the conclusion of each phase of the process, co-production partners were emphatic that they felt able to get their points across, felt respected and heard, and did not feel constrained by the sample questions provided. They reported finding the suggested questions helpful for ensuring their interviews generated useful insights.

## Analysing data

We used a combination of grounded theory (Charmaz 2006) to initially identify all the themes of the data, and then a combination of inductive (Braun & Clark 2006) and theory-driven analyses to organise those themes into a model of thriving.

Transcripts of the interviews were produced using Otter, a speech-to-text software. Themes were then coded into slabs of transcript text to indicate what was being said in those slabs, for example 'basic needs', 'thriving is subjective', 'relationships', 'domestic violence', etc. One academic then grouped these codes according to clusters of emerging themes, while another organised them using existing theories of wellbeing from the literature. This approach allowed us to apply our deep knowledge of wellbeing theories while also sense-checking whether this prior knowledge was blinding us to unexpected themes in the data.

In the end, the two approaches led to similar themes (see Fabian et al. 2021), but this may not be the case in other projects and a reflexive, self-critical approach is always advisable.

This level of qualitative methodology is not always viable or necessary in most instances of co-production. What is much more important, in our view, is to check back at regular intervals or at key stages with the people involved in the co-production to ensure that they endorse the theories, measures, and objectives developed. For example, we held four all-member meetings of the working group as we went along, did pre- and post-surveys with workshop attendees, and book-ended our qualitative method with the quantitative user surveys.

## What we learned about wellbeing from co-production

The theory of thriving we co-produced with Turn2us is summarised in the report *A Model of Thriving*.<sup>7</sup> Here we reprise briefly what is distinctive about it from the point of view of conventional wellbeing research.

The theory is multidimensional and processual – it recognises that thriving is not a single unitary state, but rather a complex process through which individuals who have the necessary means embark on a process of discovering their priorities and values.

We found that many of the existing ideas in wellbeing research – namely capabilities, self-actualisation, and the role of agency – are all useful building blocks.

Although we avoided introducing technical terms, our co-production partners readily picked up on these key notions and used them to articulate their lived experience. On the other hand, we found existing measures of wellbeing such as life satisfaction questionnaires, capability surveys, or mental wellbeing scales to either be too specific, not specific enough, or impractical.

Although there is no bespoke measure of thriving that is suitable for Turn2us as yet, we learned that it will have to be far more legitimate, contextual, and sensitive than what is currently on offer.

### Ethical considerations for power sharing

Co-production requires a sensitivity to ethical issues, particularly if the research concerns vulnerable people, which may require a professional perspective. We do not have this perspective, and so will refrain from offering advice for such cases. We relied on Turn2us' expertise in these matters in our work.

### Assumptions and bias

Too often, those doing co-production have strong priors that they inevitably read into what lived experience and other participants in the process are saying. For example, much of the literature on Principle Action Research, which we drew on in developing our methodology, starts from a Marxist perspective on social change (Ledwith 2020). It is hard to remain open to a variety of value judgements when the foundations of your methodology involve such strong political claims.

More generally, we are all inevitably biased in various ways. Qualitative research methods tend to acknowledge this more than quantitative ones do. Good practice therefore involves intermittently checking to see whether you are misled by your priors or miss aspects of the qualitative data because of them. Reflexivity allows individuals to frequently question the assumptions that may be taken for granted.

A useful practice for reflexivity is to conduct data analysis a second or third time to reassess it in light of new information and with an eye to themes you may have overlooked. Another useful practice is active listening. Make sure interviewees have exhausted their own thoughts before offering interpretations of what they have said. While listening, try to empathically inhabit their point of view and understand how they are making sense of the world rather than trying to understand their experience through your own sense-making frameworks.

<sup>7</sup> <https://www.turn2us.org.uk/T2UWebsite/media/Documents/PDFs/Our-Model-of-Thriving.pdf>



Academics especially should be mindful to stay open to non-academic ways of knowing. Taking a reflexive, open-minded and open-hearted stance to qualitative research (Clark et al. 2019), is critical to the success of co-production. It builds relationships beyond rapport, ensures that research is with people not on them, and helps uncover greater insights.

## Remuneration

Participants must be compensated for their time. This is understandably challenging for some organisations and may even be excusable when everyone involved is a volunteer. By default, however, the value that participants, especially those with lived experience, bring to co-production should be acknowledged and respected, and this means paying people for their work, especially when everyone else involved is remunerated.

## Decision-making

At a minimum, co-production cannot conclude without all participants signing off on the product. This should not be interpreted too strictly; you cannot satisfy everyone, and some sticklers cannot be allowed a veto.

A general principle of treating all participants as authors on the project, and thus entitled to a final say on its contents and take away messages, will encourage genuine power sharing. Participants should feel like they own the product, and are proud to put their name on it.

Ideally, co-production should be institutionalised within policy processes to ensure it goes beyond one-off or infrequent reports and instead sees people with lived experience contributing to policy decisions, designs, and evaluation on a regular basis. They should be germane to the policy process.

## Limits to co-production

While we would like to see co-production applied much more broadly across policy, and think that it is too easily dismissed as infeasible at present, we recognise that it has major limitations (Oliver et al 2019). Operationally these include scale, cost, time frame, and the availability of people with lived experience, practitioners, and relevant technical experts.

There are also broader issues of how generalisable and standardisable the outputs of co-production can be (although the challenge of generalisability applies to many other methods). This is especially an issue for wellbeing policy, where it would be beneficial to have common definitions, measures, and objectives.

The operational challenges of co-production boil down to it being unwieldy. At large scales, like national-level policy, ensuring both conceptual saturation and representativeness requires a big and involved co-production process that will be expensive, time consuming, and hard to manage.

These challenges can be met by working from the bottom up at smaller scales and then generalising results, and by utilising less time- but potentially more resource-intensive methods such as citizens' assemblies and other tools developed for deliberative democracy (Setälä 2017).

What's important to keep in mind is power-sharing and leaving value judgements up to those who will be affected by policy. Value judgements are not technical questions (though academics can certainly discipline thinking around them) and so 'rigorous' policy

making in these areas is less about scientific consensus and more about stakeholder engagement.

We are confident that if policy makers are genuinely committed to co-production, they can find ways to incorporate it into their work in some form or another, regardless of scale. Pilot efforts can then be developed into more substantial forms of co-production over time as experience mounts.

The methodology we have outlined holds promise as a means of creating generalisable wellbeing policy from the bottom up (Fabian et al. 2022). To date, most high-profile efforts at wellbeing policy, such as Bhutan's Gross National Happiness (GNH) planning tool or New Zealand's Wellbeing budget, have proceeded from the top down.

In the GNH tool, for example, wellbeing is defined centrally and measured using standardised metrics that are regarded as universally valid. All policy proposals are assessed in terms of how they perform according to this definition and against these measures.

Frijters & Krekel (2021) recommend a similar approach to wellbeing policy making, with treasury officials allocating funds to policies according to how cost-effectively they maximise life satisfaction.

A bottom-up approach instead empowers the end-users of government services and the lowest spatial levels of policy making, such as communities and local governments, to determine what wellbeing means and how it should be assessed (Scott & Bell 2013). Some of the well-known wellbeing consultation exercises such as those conducted by the Office of National Statistics in 2011, as well as France, Germany, and Italy in the last decade are examples of this. However, they are not contextual and sensitive enough to qualify as co-production in our sense.

The more contextualised wellbeing policies that we have in mind are ones that can be fed back to the centre through a process of scaling up and generalisation. The different branches of policy all ultimately produce wellbeing policy and, as such, can come together in further rounds of co-production to develop relatively more abstract conceptualisations and measures of wellbeing that work across all their contexts. We should not presume that such scaling up will always be successful and that is, in itself, a valuable lesson for wellbeing policy.

For example, Turn2us intends to collaborate with other charities working with individuals facing financial hardship, such as those dealing with debt, housing, mental health, and substance use, to develop a theory of thriving that can inform the social care sector more broadly. This conceptualisation, given its higher scale resolution, will necessarily be more abstract than the fine-grained conceptualisation developed for Turn2us or any other single charity. Nonetheless, it will help sector organisations articulate a shared understanding of what wellbeing is in their context and how they want to promote it.

The same is true for other measures that may emerge. A substance abuse charity may want to measure the number of days clean and sober, for example, and this will not be of much use for other charities. But all charities working against financial hardship may endorse a measure of basic needs being met, or self-efficacy. Further rounds of co-production could then generalise the theory further, across areas of social policy. At this stage, representatives from government and the taxpaying public would need to be involved in the co-production as legitimate stakeholders.

The principal weakness of a bottom-up approach is that it is slow to get established and even slower to become institutionalised. As such, it makes sense to commence wellbeing

policy efforts with top-down approaches, so long as these do not foreclose bottom-up efforts.

In contrast, top-down approaches in this context ensure that interested parties who are constrained in terms of resources, knowledge, or time can consult top-down frameworks to obtain potentially useful conceptualisations, measures, and objectives for wellbeing policy that can readily be applied in their work.

Top-down wellbeing policy plays an important coordinating role here. We hope that as bottom-up wellbeing policy becomes more widespread, it can begin to share in this coordinating role, and eventually subsume it once it has reached the top from the bottom.

By this stage, policy makers should be able to view wellbeing policy at any scale and identify co-produced wellbeing concepts, measures, and objectives that are tailored to that specific scale for whatever context they are interested in. These will be shared in some way up and down the chain of wellbeing policy scales, allowing for effective comparisons across wellbeing policy applications while preserving context-sensitivity.

## Conclusion

We hope that this methodology paper is informative and useful for wellbeing policy makers looking for ways to develop legitimate, context-sensitive and rigorous conceptualisations, measures, and objectives for wellbeing policy.

Our thinking on these themes is very much a work in progress, and we would welcome feedback and inquiries. While we of course have strong opinions, we feel that wellbeing policy is best served by robust dialogues that harness the many different perspectives on wellbeing policy that come from across disciplines, institutions, policy areas, organisational cultures, and individuals investing in this important and thriving area.

We look forward to revising our opinions on the basis of discussion.

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