

# GUIDELINES AND TOOLS FOR EQUITY-BASED CO- CREATION (EqCC)

Working Document



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**CCSIP**





## Table of Contents

<b>GUIDELINES FOR EQUITY-BASED CO-CREATION .....</b>	<b>4</b>
WHY USE EQUITY-BASED CO-CREATION IN PARTNERED RESEARCH? .....	4
EQCC CORE PRINCIPLES .....	5
<i>EQUITY. Redistribute power and resources</i> .....	5
<i>RESPECT. Center partners' expertise in all decisions</i> .....	5
<i>RECIPROCITY. Commit to creating mutual value and non-extractive practices</i> .....	6
<i>ACCOUNTABILITY. Be transparent, respectful and accountable</i> .....	6
<i>EXPERIMENTATION. Iterate, learn and adapt</i> .....	6
<i>USABILITY. Focus Design on implementation</i> .....	7
<i>TRANSPARENCY. Govern and Make-Decision to Build Trust</i> .....	7
PROCESS .....	8
<i>Discover</i> .....	8
<i>Explore and Define</i> .....	9
<i>Develop and Test</i> .....	9
<i>Deliver and Listen</i> .....	9
MINIMUM STANDARDS .....	9
DOs .....	9
DON'Ts .....	10
<b>EQUITY-BASED CO-CREATION (EQCC) CORE PRINCIPLES SELF-CHECK.....</b>	<b>11</b>
<b>EQUITY-BASED CO-CREATION (EQCC) GOVERNANCE CHARTER TEMPLATE .....</b>	<b>13</b>
<b>EQCC STATEMENT TEMPLATE .....</b>	<b>15</b>
EXEMPLARS .....	16
<i>Fictional Exemplar 1: EqCC as the Core Research Approach</i> .....	16
<i>Fictional Exemplar 2: EqCC to Ensure Social Impact and Accountability</i> .....	16
<i>Fictional Exemplar 3: EqCC as a Strategy for Ethical, Inclusive, and Effective Research</i> .....	17
<b>REFERENCES .....</b>	<b>18</b>



This document is provided as a reference and background resource for CCSIP. EqCC informs CCSIP’s own approach to partnered research and innovation and the purpose of this document is to make explicit and outlines the principles, language, and practices and evidence associated with Equity-based Co-Creation (EqCC). CCSIP’s EqCC approach is, at its core, inspired by the foundational work of **Dr. Gillian Mulvale and Dr. Sandra Moll** and other colleagues at the **EqCC Hub at McMaster University**, whose scholarship and practice have shaped the development of equity-based co-creation. While CCSIP draws on this document to guide reflection and alignment, it adapts and applies these concepts within its own governance structures, research contexts, and partnership practices.

Authors: **Sandra Lapointe, Tsinat Semagn, Akacia Propst**

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# GUIDELINES FOR EQUITY-BASED CO-CREATION

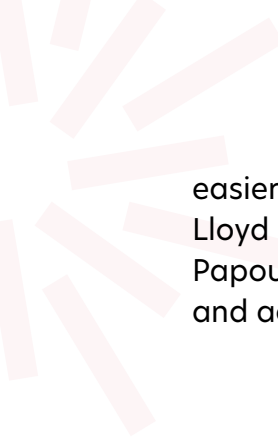
## WHY USE EQUITY-BASED CO-CREATION IN PARTNERED RESEARCH?

Equity-based Co-Creation (EqCC) is a collaborative approach developed at McMaster University (Mulvale et al., 2024; Mulvale et al., 2025) that fosters equitable knowledge systems by intentionally redistributing power throughout the research process. EqCC centers epistemic justice and diverse community expertise and experience across the design, delivery, leadership, implementation and/or evaluation of research, programs, processes and policies to bolster the quality and uptake of research and innovation. EqCC revolves around co-design processes such as human-centered and experience-based co-design which originated in healthcare and social research (Bate & Robert, 2006; Palmer et al., 2019) and to reduce harm to structurally vulnerable communities (Moll et al., 2020; Amann & Sleight, 2021) and have been adapted to foster genuinely interdisciplinary and intersectoral scientific collaborations.

CCSIP uses EqCC principles to structure the governance and the process of research in which non-academic partners are involved. EqCC helps articulate and leverage the “embedded” knowledge and expertise which partners can contribute to research focused on societal impact, in addition to the lived-experience of end-users or other community members where relevant. Co-design positions the expertise as well as the contextual experiences, interests and needs of all research partners as a centrally relevant data needed to properly frame both the problem and its solution, insuring that it integrates the knowledge of those who will ultimately use and/or implement the research to create the desired change.

When used as a social impact research methodology, EqCC helps build trust and reciprocity, advance fair opportunities and improve outcomes for non-academic partners and their communities. It offers a corrective to extractive practices by embedding equity, reciprocity, partners’ expertise and, where relevant, lived experience, at every stage. The core purpose of EqCC is to ensure that those most affected by an issue meaningfully shape research questions, decisions, and solutions (Bate & Robert, 2006; Mulvale et al., 2025). Through apt facilitation, EqCC can help safeguard inclusive, psychologically safe spaces, enable equitable participation, and ensure partners’ knowledge and expertise is the anchor for decisions (Mulvale et al., 2024).

There is strong evidence that co-created solutions are more grounded, legitimate, adoptable, and sustainable (Palmer et al., 2019; Phoenix et al., 2024). They are often



easier to implement and better at addressing real-world barriers (Mulvale et al., 2025; Lloyd et al., 2021), with stronger potential for system change (Micsinszki et al., 2022; Papoutsi et al., 2021). EqCC thus helps ensure research collaborations are equitable and accountable to partners and their communities.

## **EQCC CORE PRINCIPLES**

The principles of EqCC revolve around 6 key concepts: equity, respect, reciprocity, accountability, experimentation, usability and transparency. Each theme is developed below.

### **EQUITY. Redistribute power and resources**

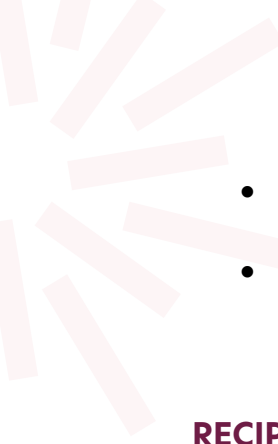
Shift the project's agenda-setting, decision-making, visibility, and benefits toward those most affected

- Grant non-academic partners real decision-making authority—not merely advisory roles.
- Allocate budget resources directly to non-academic partners. Provide compensation, leadership opportunities, and paid co-facilitator roles that reflect their contributions and authority.
- Co-design meeting formats, timelines, and deliverables with partners. Build the project's working rhythms collaboratively rather than imposing academic structures.
- Provide the resources required for equitable participation. Offer training, technology, transportation, childcare, and translation as needed.
- Operate through shared governance models. Distribute power and responsibility across partners rather than centralizing it within the academic team, while taking into account material constraints of partners whose resources might be limited.

### **RESPECT. Center partners' expertise in all decisions**

Let partners' experience and knowledge of their context drive priorities, framing, design choices, and evaluation criteria (Bate & Robert, 2006; Mulvale et al., 2025).

- Engage non-academic partners in the definition of priorities, challenges, and success criteria according to their interests, contexts, and needs.
- Defer to partners' expertise when decisions affect their organizations, communities, or the populations they serve. Treat their contextual knowledge as the primary authority.
- Use co-design tools—such as experience mapping, touchpoint identification, and prototyping—to ground decisions in data that reflects partners' realities.

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- Document how partners’ insights shape, redirect, or refine project decisions. Make the influence of their expertise visible and traceable.
  - Co-lead analysis, interpretation, and dissemination with community partners, ensuring shared ownership of meaning and impact.

## **RECIPROCITY. Commit to creating mutual value and non-extractive practices**

Build relationships and processes that give back knowledge, capacity, compensation and influence

- Ensure community partners feel supported, respected, and valued—never used.
- Provide opportunities for engagement that generate mutual benefit, such as capacity-building, professional development, access to findings, or pathways to community-led outcomes.
- Co-decide how stories, data, insights, and outputs are used. Share authority over interpretation, representation, and dissemination.
- Reject extractive practices. Do not collect data, stories or knowledge without returning value, ensuring transparency, and sharing ownership.
- Provide fair, prompt compensation aligned with community standards. Treat compensation as a core ethical obligation, not a favor or an afterthought.
- Build intentional “give-back” into the project. Offer training, co-authorship opportunities, tools, or other community-directed benefits.


## **ACCOUNTABILITY. Be transparent, respectful and accountable**

- Articulate and communicate expectations, roles, limits, constraints, and decision-making powers clearly from the outset.
- Share decision logs, meeting summaries, etc., openly so all partners understand how decisions were made, who made them, and why.
- Address conflicts and concerns through shared processes that partners design and agree upon together.
- Demonstrate respect through thoughtful facilitation, accessible communication, and consistent check-ins with all partners.

## **EXPERIMENTATION. Iterate, learn and adapt**

Expect to refine and revisit stages as insights emerge

- Remains responsive to emerging insights rather than adhering to a fixed or prescriptive plan.
- Build flexible plans intentionally and allow the work to shift as community partners surface new perspectives or priorities.
- Test and refine prototypes, tools, and decisions through intentional iterative cycles of testing, reflection, and refinement.

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- Use developmental evaluation or rapid-learning methods to capture what works, what does not, and what needs improvement.
  - Return to earlier stages - discovery, framing, or design – when appropriate. Taking a “step back’ is not only acceptable but recommended to deepen understanding.
  - Share learning openly among all partners to foster continuous improvement and collective stewardship of the process.

## **USABILITY. Focus Design on implementation**

Prototype, test, and adapt in real or simulated settings to ensure solutions work in practice.

- Embed Implementation Considerations from the Start by ask: *Who will use this? Under what constraints? With what resources?*
- Ensure that research outputs reflect partners’ capacities, time resources, technological realities, and organizational constraints by designing solutions that “fit” the existing systems rather than assuming systems will adapt
- Check solutions for clarity, simplicity, and ease of uptake and ensure steps, tools, and processes are intuitive for intended users
- Incorporate accessibility, cultural safety, and equity considerations into usability testing
- Develop implementation plans collaboratively
- Identify required resources, training, workflows, and responsibilities and clarify what sustainability looks like and who stewards the solution long-term

## **TRANSPARENCY. Govern and Make-Decision to Build Trust.**

Make visible how community feedback shapes outputs and governance

- Maintain Clear Decision Logs by keeping written records of decisions, including agreements, disagreements, and the rationale behind choices, what changed and why, as well as the evolution of prototypes, problem definitions, and priorities
- Ensure Transparency in Governance Structures by recording who participated in governance and decision-making
- Make power-sharing arrangements explicit and document shifts in roles, responsibilities, or authority
- Share documentation accessibly, by using formats partners can easily understand (e.g., summaries, visuals, plain language notes)
- Store materials in shared, accessible locations and updating partners regularly so documentation becomes part of the process, not an afterthought
- Promote accountability by ensuring documentation demonstrates equity commitments in action, e.g. partners meaningfully shaped decisions
- Make time for reflecting transparently on how power was shared, redistributed, or contested

## PROCESS

The Double Diamond of Design model (Design Council, 2005) can be used to map the EqCC process. The process can be articulated around four phases: **Discover, Explore and Define, Develop and Test, Deliver and Listen**, each involving concrete activities and deliverables.

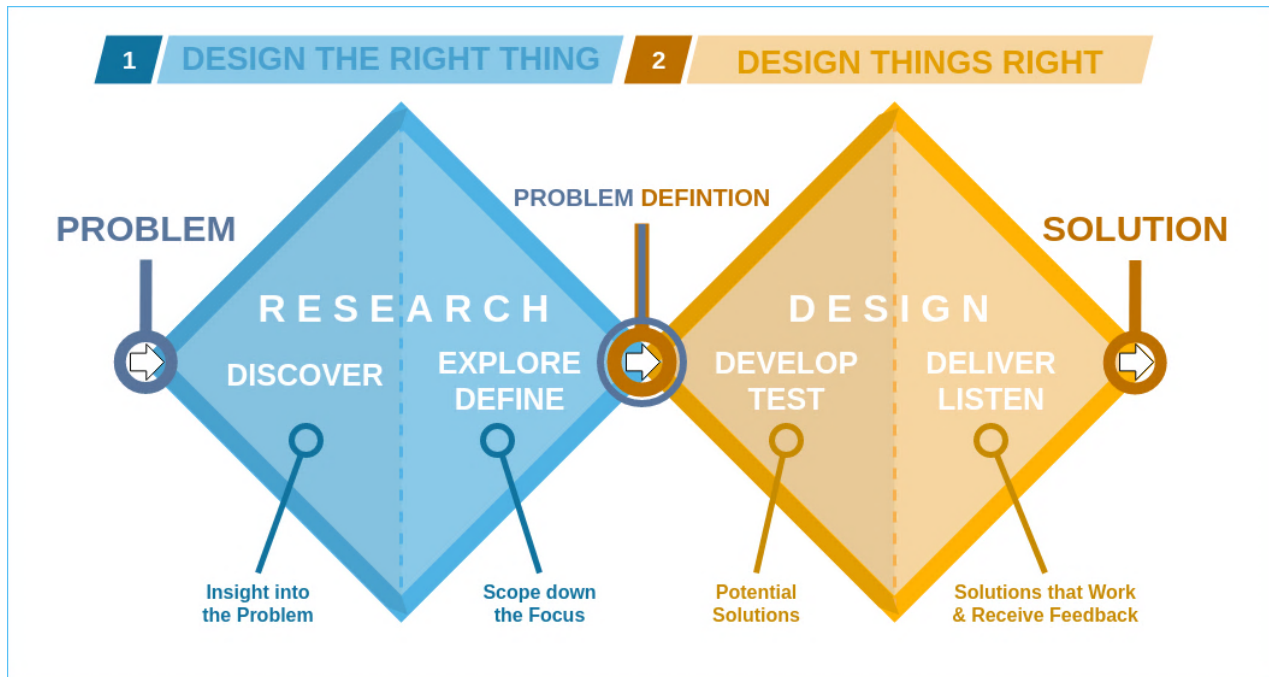


Image Credit: Medium

## Discover

Purpose	Example of Activities	Example of Deliverables
Surface embedded experiences and knowledge, touchpoints, pain points, and root causes to identify and understand partners' unmet needs and context.	<ul style="list-style-type: none"> <li>Interviews and focus groups to capture context and challenges (Mulvale et al., 2019).</li> <li>Experience mapping and touchpoint identification to visualize journeys (Micsinszki et al., 2022; Papoutsis et al., 2021).</li> <li>Pain-point surfacing and <b>root-cause analysis</b> (e.g., <b>Five Whys</b>) to go beyond symptoms (Rybkowski &amp; Ballard, 2008).</li> </ul>	Experience maps, synthesized insight notes, initial list of pain points and root causes.

## Explore and Define

Purpose	Example of Activities	Example of Deliverables
Clarify priorities and frame the problem together to align on shared priorities and "design briefs" that all research partners co-own.	<ul style="list-style-type: none"> <li>Thematic grouping and clustering to find patterns in the data collected in the Discover phase (Lloyd et al., 2021).</li> <li>Co-framing sessions to translate insights into problem statements and criteria for success (Bate &amp; Robert, 2006; Palmer et al., 2019).</li> </ul>	Co-authored problem statements, success criteria, and priority opportunity areas.

## Develop and Test

Purpose	Example of Activities	Example of Deliverables
Turn insights into tangible options and get early feedback to generate options and prototype with partners	<ul style="list-style-type: none"> <li>Small-group <b>co-design and low-fidelity prototyping</b> (sketches, mock-ups, draft tools, workflows) to keep ideas adaptable (Micsinszki et al., 2022; Palmer et al., 2019).</li> <li>Structured <b>feedback loops</b> for critique and adaptation (Bate &amp; Robert, 2006; Micsinszki et al., 2022).</li> </ul>	Prototype versions (v0.1, v0.2...), decision logs, feedback summaries.


## Deliver and Listen

Purpose	Example of Activities	Example of Deliverables
Test and refine to validate usability, and plan adoption and/or implementation.	<ul style="list-style-type: none"> <li><b>Scenario-based walkthroughs</b>, role-plays, and <b>usability assessments</b> in real or simulated settings (Aschbrenner et al., 2024; Papoutsis et al., 2021). <b>Iteration back to earlier phases</b> when new insights arise (Moll et al., 2020; Mulvale et al., 2024).</li> </ul>	Tested solution(s), implementation plan, governance and ownership agreements, evaluation framework

## MINIMUM STANDARDS

### DOs

- Resource accessibility and participation are non-negotiables (Moll et al., 2020; Mulvale & Robert, 2021).

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- Prototype early and often; test with the people who partners or with those who will use the solution (Micsinszki et al., 2022; Papoutsi et al., 2021).
  - Keep transparent decision logs and report-backs (Lloyd et al., 2021; Mulvale et al., 2024).
  - Co-author priorities, briefs, and criteria for success with partners (Bate & Robert, 2006; Mulvale et al., 2025).

## **DON'Ts**

- Treat community as informants only or extract data and/or stories without shared ownership (Moll et al., 2020).
- Freeze the plan—expect to loop back as new insights emerge (Moll et al., 2020; Mulvale et al., 2024).
- Skip implementation planning; design for adoption from the start (Palmer et al., 2019; Mulvale et al., 2024).

# EQUITY-BASED CO-CREATION (EQCC) CORE PRINCIPLES SELF-CHECK

The EqCC Self-Check is a reflective tool designed to support research teams and partners in assessing how well Equity-based Co-Creation principles are being enacted throughout the project. Teams should use it collaboratively—at key stages of the research or at regular intervals—to prompt discussion, surface gaps, and identify areas for adjustment. The self-check is not intended as a compliance checklist, but as a learning and accountability aid that helps partners reflect on power-sharing, reciprocity, transparency, usability, and equity in practice, and to guide iterative improvements over time.

	CHALLENGE	LEARNING	FLOURISHING
<b>Equity</b>			
Decision-making is shared with partners			
Agenda-setting is co-owned			
Resources (time, funds, visibility, authorship) are redistributed equitably			
Roles are clearly defined to elevate partners' leadership			
<b>Respect</b>			
Partner's contextual knowledge drives priorities			
Partner experience is treated as essential data			
Framing and design choices are led by partners' insights			
Success criteria are co-defined to reflect value and impact for partners			
<b>Experimentation</b>			
Iteration is planned and adequately resourced			
Loops back to earlier phases are normalized and seen as part of the methodology			
Changes are documented and communicated transparently			
<b>Usability</b>			
Planned research output reflects the needs of partners, not traditional academic product			
Prototypes of research output are co-created early			
Prototypes are co-tested in real or simulated settings			
Adaptations are made based on partner feedback			
Implementation considerations are embedded from the start			
<b>Reciprocity</b>			
Fair compensation and recognition is provided to partners			
Capacity-building opportunities for partners are built into the process			
Final research outputs are delivered in formats that reflect the needs of partners and are accessible			

Processes minimize the burden of academic research on partners			
<b>Accountability</b>			
Decision logs are created early and maintained to track collaboration dynamics			
Discussion notes and feedback summaries are shared			
Rationale for changes are explicit and accessible			
Governance processes are recorded in the project charter			
<b>Transparency</b>			
Governance processes, e.g. decisions, agreements, disagreements, rationales, etc. are recorded			
Documentation is accessible, uses plain-language and stored accessibly, e.g. on a free cloud-based drive			
Accountability is demonstrated and documented, and commitment to equity includes space for reflection on how power is shared, redistributed or contested.			



# **EQUITY-BASED CO-CREATION (EQCC) GOVERNANCE CHARTER TEMPLATE**

Below you will find a template to help you create a 10-section governance charter for a project based on equity-driven co-creation (EqCC). The governance charter must be directly based on a proper integration of the fundamental principles of EqCC.

## **1. Purpose of the Partnership**

- Describe the shared purpose, goals, and anticipated impacts of the research partnership.
- Reference how EqCC principles will guide priorities and outcomes.

## **2. Guiding Principles**

- List the specific principles that will guide the collaboration. See Core EqCC Principles above.
- Be relevant and intentional. Do not include principles that require commitments which you cannot uphold.

## **3. Partnership Structure and Roles**

- Define the roles of non-academic partners, researchers, facilitators, and other participants (e.g. individuals with lived experience).
- Clearly outline decision-making authority and shared leadership structures.

## **4. Decision-Making Processes**

- Describe how decisions will be co-made, including:
  - What decisions require consensus and how consensus is defined.
  - Which decisions are co-owned and which are delegated.
  - Processes for documenting decisions

## **5. Communication and Information Sharing**

- Specify communication norms, frequency of meetings, formats and accessibility considerations.
- Include how updates and feedback will be shared back with all partners.

## **6. Equity and Accessibility Commitments**

- Describe supports such as compensation, transportation, translation, flexible scheduling and facilitation.



## 7. Conflict Resolution

- Define processes for addressing misunderstandings, conflict, or harm in ways aligned with EqCC equity and relational principles.

## 8. Data Governance and Ownership

- Co-define data ownership, use, storage, authorship, and dissemination. Ensure lived-experience partners have meaningful control over outputs.

## 9. Iteration and Review

- Describe how this charter will be revisited and revised through ongoing feedback loops.

## 10. Signatures and Commitments

- Include space for all partners and collaborators to sign and affirm shared commitments.



# EqCC STATEMENT TEMPLATE

Below is a template for producing a methodological statement about Equity-based Co-Creation (EqCC) Statement at your research proposals and grant applications.

## 1. Project Overview and Rationale for EqCC

Briefly describe the research project and explain why an Equity-based Co-Creation (EqCC) approach is essential. Include the social issue being addressed and why how partners' expertise and embedded knowledge is crucial. Identify the core EqCC principles that will guide the work (see above).

## 2. Partnerships Structure and Shared Governance

Describe the structure of the research partnership, including roles of community partners and lived-experience collaborators.

## 3. Co-Creation and Engagement Methods

Explain how the project will use co-design and co-creation methods such as interviews, journey mapping, prototyping, and iterative refinement to meet its goal.

## 4. Accessibility, Equity, and Support Mechanisms

Describe supports that will ensure equitable participation, e.g. compensation, accessibility planning, etc.

## 5. Decision-Making and Accountability Processes

Outline how decisions will be co-made and documented, referencing transparency and shared authority.

## 6. Ethical Considerations and Harm Mitigation

Describe how the project will safeguard participants, avoid extraction and incorporate iterative ethical reflection.

## 7. Knowledge Sharing, Mobilization, and Ownership

Explain how data, findings, and outputs will be co-owned, co-interpreted and co-disseminated.

## 8. Evaluation and Iterative Learning

Describe how the project will use developmental evaluation and continuous feedback loops.

## EqCC STATEMENT EXEMPLARS


### Fictional Exemplar 1: EqCC as the Core Research Approach

This project will adopt an Equity-based Co-Creation (EqCC) methodology to ensure that our primary community partner, *[Partner Organization]*, meaningfully shape every stage of the research. EqCC is intentionally designed to redistribute power, center lived expertise and disrupt extractive practices that have historically harmed structurally vulnerable communities during environmental transition efforts (Mulvale et al., 2024; Moll et al., 2020). Working directly with *[Partner Organization]*—an organization deeply embedded in the local social, cultural, and environmental realities of *[Community Name]*—we will co-create research questions, governance structures, and implementation pathways using Experience-Based Co-Design (EBCD), which grounds key aspects of problem definition, including the definition of research questions, in the lived experience and expertise of partners (Bate & Robert, 2006). Through iterative feedback loops and shared decision-making, we will document how the insights and priorities of *[Community Name]* meaningfully alter and refine the project direction (Lloyd et al., 2021). This approach ensures that the research remains responsive, accountable, and aligned with community-defined priorities for a just and sustainable environmental transition, thereby strengthening the legitimacy, usability, and long-term impact of the work (Palmer et al., 2019; Phoenix et al., 2024).

### Fictional Exemplar 2: EqCC to Ensure Social Impact and Accountability

Our project is grounded in Equity-based Co-Creation (EqCC), an approach that centers fosters reciprocity, and ensures that community partners meaningfully shape the design and delivery of research activities (Mulvale et al., 2019; Mulvale et al., 2024). In partnership with *[Name of Sex Worker Safety Organization]*—a trusted organization dedicated to improving safety, rights, and harm-reduction supports for sex workers—we will use Experience-Based Co-Design (EBCD) to co-create a new digital safety app informed directly by the lived realities of sex-working community members (Bate & Robert, 2006; Papoutsi et al., 2021). Together, we will surface priority safety concerns, map experiences of navigating risk, and identify features that reflect community-defined needs and preferences.

This work will include accessible engagement supports, fair compensation, and trauma-informed facilitation to eliminate barriers to participation and ensure that contributors can engage safely and equitably throughout the design process (Moll et al., 2020; Mulvale & Robert, 2021). App prototypes—including wireframes, user flows, alert functionalities, resource pathways, and safety-planning tools—will be co-designed, tested, and iteratively refined with sex workers and *[Organization]* to ensure usability, feasibility, and community ownership (Micsinszki et al., 2022). By embedding EqCC into our governance, implementation, and evaluation strategies, the project will generate a




grounded, contextually relevant digital safety tool with strong potential for sustained adoption and real-world impact in improving the safety of sex workers (Palmer et al., 2019).

### **Fictional Exemplar 3: EqCC as a Strategy for Ethical, Inclusive, and Effective Research**

This project integrates Equity-based Co-Creation (EqCC) to create an ethical, inclusive research environment that actively counters extractive practices often experienced by people facing homelessness and housing precarity (Moll et al., 2020; Amann & Sleight, 2021). EqCC provides a relational and power-sharing framework that positions [*Housing First Organization*] and individuals with lived experience of homelessness as co-experts and co-leaders throughout the research process (Mulvale et al., 2024). Guided by Experience-Based Co-Design (EBCD), we will engage in discovery activities such as interviews, journey mapping, and shared analysis to identify priorities grounded in the real housing, safety, health, and service-navigation experiences of the community (Bate & Robert, 2006; Mulvale et al., 2019). Iterative prototyping and scenario-based testing will support the co-development of Housing First tools, practices, or implementation pathways that are usable, acceptable, and feasible (Papoutsi et al., 2021; Aschbrenner et al., 2024). This approach builds trust, strengthens shared ownership, and enhances the likelihood that Housing First strategies developed through the project will be sustainable, community-aligned, and impactful (Phoenix et al., 2024).

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