The Victorian Collaborative Centre
For Mental Health & Wellbeing

Working it out together

Phase 3 Report

A brief pilot of the research toolkit and concise workbook

wellways

LA TROBE UNIVERSITY

VICTORIA State Government

Preface

This project was completed by Wellways Australia for the Victorian Collaborative Centre for Mental Health and Wellbeing.

Project Leads: Dr Catherine Brasier – National Manager of Evaluation and Research (Lived Experience) and Adjunct Research Fellow, School of Social Work and Social Policy, La Trobe University and Alicia Baker (Senior Policy Officer – Knowledge Sharing and Practice Translation - Victorian Collaborative Centre for Mental Health and Wellbeing).

Acknowledgements: Wellways Australia - The Lived Experience Leadership Team, Mary O'Hagen (Director of Lived Experience), Gerard Reed (Director of Business Development), Rob Trewin (Emerging Ally Research Assistant), Charunda B. Bodaragama (Implementation Lead), Anita Conlon (Lived Experience Coproduction and Engagement Lead), Sally Whitelaw (Operations Manager, Greater Shepparton City, Shire of Strathbogie and Moria Shire, Mental Health and Wellbeing Local).

Acknowledgment of Country

The Victorian Collaborative Centre for Mental Health and Wellbeing (the Collaborative Centre) acknowledges with deep respect all First Nations people and Traditional Owner groups within Victoria. We recognise their enduring connection to Country, Culture and Kin, a connection that has been nurtured for thousands of years. We acknowledge government's role in the devastating impacts of colonisation, the displacement and dispossession of First Nations people, and the ongoing social, emotional, biological and political consequences. We pay our deepest respects to elders past and present, recognising their ongoing resilience, wisdom and leadership. We acknowledge that this land was, is, and always will be Aboriginal land.

Recognition of Lived Experience

We acknowledge people with Lived and Living Experiences of mental ill-health and psychological distress and the experiences of people who have been, and are, families, carers, supporters and kin. We are grateful for their expertise and generosity in guiding the Collaborative Centre's work.

Some of the most powerful evidence of the Royal Commission into Victoria's Mental Health System came from the personal experiences of people living with mental ill-health, their families, carers, supporters and kin. There has been extraordinary determination and courage as people have revisited painful memories in the hope of shaping a better future for themselves and others. The Collaborative Centre celebrates, values and welcomes people of all backgrounds, genders, sexualities, cultures, religions, ages, bodies and abilities.

Dr Cat Commentary

Hi everyone, I'm Dr Catherine Brasier (you can call me Cat). I am a Consumer Academic and was the Project Lead for the scoping review, toolkit and workbook and concise workbook. I've been an active member of the Lived Experience movement since 2006. Before I was a Consumer Academic, I was a community mental health worker. I'm now the National Manager of Evaluation and Research (Lived Experience) at Wellways Australia where we are pioneering service participant and Lived Experience driven research.

Partnership Reflection

Alicia Baker – Victorian Collaborative Centre for Mental Health and Wellbeing

As a traditional researcher, working with Catherine and the Wellways team the on the Lived and Living Experience Research Toolkit and mini pilot project truly brought to life for me what authentic Lived Experience co-design/co-production research looks like in practice. Impactful and meaningful outcomes for people with Lived Experience. When research is Lived-Experience led, it can have life-changing impact for people but also build the capability of the lived experience research workforce. I look forward to putting this toolkit into practice in my future research and sharing it with other mental health researchers in Victoria via the Knowledge Sharing Platform.

Supporting the development of the scoping review, toolkit and the pilot project has also generated meaningful outcomes for the Victorian Collaborative Centre for Mental Health and Wellbeing by championing Lived Experience leadership and engagement, consistent with our Translational Research Strategy and legislated functions. Moving forward, I hope we can continue to build upon the foundation that the toolkit has provided for supporting Lived Experience centred research via opportunities for the next stage of implementation, for example via a self-sustaining program of Lived Experience led mentoring or workshops.

Dr Catherine Brasier – National Manager of Evaluation and Research – Wellways Australia and Adjunct Research Fellow, Social Work and Social Policy, La Trobe University

This Lived Experience-led program of research has been an important accomplishment for Wellways and La Trobe University, affirming their commitment to putting the recommendations of the Royal Commission into Victoria's Mental Health System into action and contributing to reform by supporting others to enact change. The project took a "walk-the-walk" approach which was truly translational working with Lived Experience (consumer, family/carers/supporter/kin and intersectional perspectives). This program of research linked Lived Experience peak bodies, government, research, universities and a wide range of key stakeholders to show that "Working It Out Together" is possible, deeply valued and produces world class work that could improve real-world outcomes for consumers and family/carers/supporters/kin.

Robert Trewin – Bachelor of Social Work (Honours), La Trobe University and Wellways Emerging Ally Research Assistant

I first joined Wellways as a social work student completing my first professional placement. Luckily, I commended during the Lived Experience toolkit project, which provided me with an invaluable learning experience. I had already elected to complete the research honours stream of my degree, so commencing a placement in the research field with Wellways was excellent timing for my learning and development. Not only did this project allow me to sharpen many skills critical to research, it was also my first real exposure to the Lived Experience movement, which is important for me both as a researcher and a social worker. I do not have Lived Experience myself, so this was an opportunity for me to learn how to be an ally in this space. I thoroughly enjoyed the overall experience of working on the toolkit, so transitioning from placement student to research assistant was an opportunity I eagerly took. I am also thankful to work under Dr Cat, who's supports has been invaluable to my development as a researcher and ally and has given me a significant boost in completing my honours research.

Executive summary

Background

This pilot is the third phase of this research program, it aimed to test an innovative and accessible workbook that seeks to promote Lived Experience-centred research by providing a structured approach for researchers, services and people with Lived Experience to "work it out together". The concise workbook is a compilation of the workbook exercises from "Working It Out Together: A toolkit and workbook for Lived Experience-centred mental health and wellbeing research practice". It is also supported by a report and a scoping review that details the background and the gap that this program of research fills. Together these resources aim to provide a comprehensive resource to:

1. **Articulate the critical value of Lived Experience-centred research**
2. **Present the "Working It Out Together" key tools and workbook exercises**
3. **Resources and information addressing how to implement Lived Experience-centred research**
4. **Information about evaluating the impact of authentic Lived Experience-centred research**

This program of research considers the following research steps:

Piloting the concise workbook

We conducted a brief pilot of the exercises from the concise workbook in five research projects that were being developed at Wellways Australia between April 1st and June 9th, 2025. This pilot included developing and testing a concise workbook, and this report. The project team also submitted a revised version or "mock up" of how these changes would appear in the toolkit/workbook and report draft (phase 2 deliverables).

Objectives: The objectives of this evaluation report are to explore the impact, experience and satisfaction of the participants with the concise toolkit. Feedback about the broader program of research were also noted.

Adapting the pilot to include research capability elements: Early findings suggested that research mentoring for people with Lived Experience and service backgrounds was required alongside the concise workbook. The pilot refocused early on to include a combination of support that addressed the workbook exercises in tandem with research skill development. This included mentoring (in groups and one-on-one) and three research skills workshops provided by a Lived Experience Researcher (Dr Brasier). The workshops included:

1. Searching for and understanding grey literature

2. Searching for and understanding peer reviewed literature

3. Synthesising grey and peer reviewed literature with ease and efficiency

Data collection included a collaborative feedback log that captured data about the overall workbook, individual workbook exercises and any additional suggestions using collaborative exercises (see Appendix). We also conducted additional CEO/Executive, industry leader and intersectional feedback activities (see Appendix). All projects completed a feedback focus groups and/or interviews.

Results: A synthesis of the findings found that people who were new to research felt that this program of research provided an important and practical step-by-step guideline, in an accessible and Lived Experience-centred way. Participants reported that this gave them a greater sense of confidence that they would be able to learn research skills and complete their research tasks. Many participants preferred using the concise workbook to the original toolkit/workbook for everyday use, although the original toolkit/workbook provided important background information. Feedback from a wide range of participants (including honours students, Lived Experience staff and other leaders) stated that the language and presentation was accessible and made the challenge of learning to conduct research feel more achievable.

Key recommendations

Recommendation one – Easy and accessible navigation. The original toolkit/workbook and concise workbook should use digital links (or visual markers) so that people can quickly and easily move between them. This is especially important to people who speak English as a second language and emerging researchers. It was also key to add some concise but effective signposts and instructions to support teams to interpret the workbook in the way that is flexible and right for their specific project.

Recommendation two: Restructure research stages "Connect and Identify" and "Power". Advice by Mary O'Hagen highlighted that these stages could be re-ordered to reflect that Lived Experience and intersectional expertise, accessibility and inclusivity, research culture and the research team's mental health and wellbeing as inherent parts of how power is created and shared, (see Appendix – original and updated Actions).
It was also noted that the "Lived Experience Action Log" should be added to the concise workbook, this was a key feature of Phase Two and is useful in all meetings where Lived Experience is being centred, including service design/delivery meetings.

Recommendation three: Provide mentoring and research skill development alongside the implementation of the toolkit/workbook and concise workbook. Although each project started with a session which introduced the concise workbook and overview of the original toolkit/workbook, participants found this more helpful and meaningful when paired with research mentoring and skill development. This was especially important for Lived Experience participants who wanted to integrate their discipline perspective with critical research skills. This was done successfully using one-on-one and group mentoring/skill development. This should be done by an experienced Lived Experience researcher and could include support from non-Lived Experience researchers. This could be supported through PhD and translational research programs where research teams can learn together and co-reflect on their technical and critical stances.

Recommendation four: Share what we learned from using Lived Experience-centred research methods to create safe and positive experiences for participants, and rich effective research outputs. Additional feedback about the overall program of research indicated that there are valuable learnings connected to **how** we conducted this program of research and the way that good research techniques were combined with Lived Experience values. It is important for the Collaborative Centre to implement Lived Experience-centred research techniques and create opportunities for researchers to experience this and learn by being a part of projects where they are 'working it out together'.

Recommendation five: Translate the key concepts of this program of research beyond research and evaluation. This translational program of research includes key information, concepts and definitions that are important but often insufficiently understood across the broader mental health eco-system (e.g. Lived Experience designated roles, dual consumer/carer perspectives, intersectionality, trauma informed practice, cultural integrity, accessibility and inclusion etc.), including service design, delivery, management and practice. It also contains content that may be of value to Lived Experience organisations/peak bodies and researchers.

Recommendation six: Co-create a practical plan to launch and rollout this program of research over the next 12months to 5 years. A plan for the first 12 months should include finalising the materials and publishing them on the Collaborative Centre's Knowledge Sharing Platform. A public launch (on-line and/or in person) and dissemination plan is recommended and should include Lived Experience leaders, organisational leaders, consortium partners, members of their Lived Experience workforce, universities and academics, researchers and other key stakeholders. We also recommend connecting with university, state and national grant bodies to explore how this program of research can be shared, implemented and contribute to the development of Lived Experience-centred research (e.g. our Lived Experience-centred reporting guideline, Lived Experience Action Log and accountability tools, etc.). A roll out and resourcing plan should be developed that identifies future funding, partnerships, grants and other opportunities.

Conclusion: This pilot provided many new insights about the potential development of the Working It Out Together program of research and confirmed that this structure approach

alongside mentoring and support led to greater confidence amongst Lived Experience participants, and excellent research project outcomes.

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Background - Our program of research

Introducing the lead organisation – Wellways Australia

This program of research was led by Wellways Australia. Wellways runs psychosocial services that work with individuals, families and communities to build social, emotional and physical wellbeing. It is a leader in pioneering the integration of Lived Experience into service delivery and design. It has established a Lived Experience Authority that runs parallel to the Board, a Lived Experience Director and Lived Experience Leadership team. Wellways has adopted a committed Lived Experience and service participant-centred research and evaluation strategy and has appointed a Lived Experience academic (Dr Catherine Brasier) to lead the research and evaluation team.

Working It Out Together - Lived Experience-led project team

This Lived Experience-led team included Lived Experience and intersectional experts that contributed to every stage of the project. The project team included consumer, family/carer/supporter/kin, First Nations, LGBTIQA+SB, disability and CALD expertise, as well as service provider and researcher input.

Working It Out Together - The program of research to date

This program of research is comprised of the following.

Phase 1 outputs:

- A scoping review addressing Lived Experience input into research

Phase 2 outputs:

- A Lived Experience-centred best practice toolkit and workbook
- A report outlining the evidence used to develop the toolkit and workbook

Phase 3 outputs:

- An accessible and concise compilation of the workbook exercises from phase 2
- This report detailing the findings from the brief pilot of the concise workbook
- The updated “mock up” of the original workbook/toolkit and report with the recommended changes based on this pilot

Our report, toolkit/workbook and concise workbook are interlinked and designed in a modular way to be accessible and flexible, suitable for people who are new to research as well as professional researchers. It will be shared by the Collaborative Centre (Victorian Department of Health) on their Knowledge Sharing Platform for free public use - accessible to state, national and international audiences.

Phase One: Scoping review

A rapid scoping review was conducted (publications n=81; Lived Experience/service/leader consultations n=23). It utilised a Lived Experience-led team and highlighted that the importance of people with Lived Experience being active leaders and collaborators in research has been well established, with literature and government policies attesting to this for more than 20 years. However, it found that there was little information in the 81 included papers that addressed **how** to do this.

Phase two: "Working It Out Together" toolkit/workbook and report

The "Working It Out Together toolkit and workbook for Lived Experience-centred mental health and wellbeing research practice" addressed the gap identified in phase one regarding **how** to conduct mental health research by including people with Lived Experience as active collaborators and leaders in the research team. The toolkit and workbook are based around 17 key research "Actions" across six stages of the research life cycle for developing, implementing, sharing and evaluating Lived Experience-centred research. The deliverables included a report that outlined the evidence and influences that the toolkit and workbook drew on.

The project adopted an innovation lens and combined Lived Experience (co-production/design), product development and research methods. An Expert Advisory Group was established with 25 consumer, family/carer/supporter/kin, Lived Experience leaders, coproduction experts, researchers and service development/delivery workers. They met three times (2xhalf days, in-person; 1x3 hour meeting online) and completed co-production (group and individual) activities to drive the development of the toolkit. We also held Expert Taskforce consultations to address gaps identified in the project, plus two focus groups with consumers (n=8) and carers (n=8).

This "walk-the-walk" project ensured that the project team road-tested their tools and advice throughout the project, creating experiential learning and helping iteration. Members of the project stated that the way the research was conducted created transformative experiential learning that built research and Lived Experience capabilities and fostered mutually beneficial relationships and understanding between consumers/ family/carers/supporters/kin, researchers and mental health services.

Future implementation of "Working It Out Together" could improve mental health outcomes in the community by increasing the capabilities of researchers and people with Lived Experience to design, implement and evaluate research together. It directly addresses the critical impact of how consumers and family/carers/supporters/kin have been sidelined and left out of the research process, when they hold the information required to make real world improvements.

Phase three: Piloting a concise and accessible workbook

This phase builds on the work completed so far and further refines the workbook exercises to create a concise and accessible workbook. This companion document compliments the toolkit/workbook and report produced in phase two and should be a go to resource for project teams to support them to "work it out together". Early feedback led to the introduction of research mentioning (group and one-on-one) alongside piloting the workbook exercises to better meet the needs of pilot teams.

Creating and piloting a concise workbook

Introduction

Based on the above program of research phase three sought to refine the original workbook and toolkit to make it more concise and accessible, with the view that it could be a companion document to the toolkit/workbook and report produced in phase two. This was especially important as they are quite lengthy documents, and it was felt that a concise version would be make completing the workbook exercises as a research team easier to do.

Purpose, objectives and key research questions

The purpose of this pilot: This brief pilot produced a concise and accessible version of the workbook exercises as a companion document to the original toolkit/workbook and report from phase 2. This concise workbook was piloted and refined. Any other feedback about this program of research (e.g. workbook exercises and information) was also noted.

The pilots research question: What is the impact, experience and satisfaction of people using the workbook exercises and information from concise workbook and toolkit/workbook?

Objective one: To inquire into the following:

1. Impact: How effective do you think these tools are at helping researchers embed Lived Experience leadership and engagement in mental health research practice? (*How did these tools change how you conducted your research? What did you learn about integrating Lived Experience into your research project? Did these tools help or hinder the research process?*)
2. Experience: What was it like to design a research project using Lived Experience-centred tools? (*What were the challenges and benefits?*)
3. Satisfaction: How satisfied were you with:
    a. The toolkit/workbook and concise workbook exercises and information overall?
    b. How information about Lived Experience was integrated in the tools (i.e. exercises and information)?
    c. How helpful these tools help or hinder the research process?

Objective two: Produce a concise and accessible version of the workbook to accompany the report and toolkit. This will address:

a. Feedback from the conclusion of the toolkit and report project (March 2025)
b. Feedback and suggestions from this project
c. Finalise reflection from Co-production Experts

The project also gathered additional field notes and suggestions from contributors.

Method

Research projects that participated in this pilot

Table 1. below details the key details for the research projects that participated in this pilot.

Table 1. The research projects in this pilot

Research projects (n = 5)	Project type	Participants, organisation, Lived Experience)	Stage of development at the beginning of project	Stages/ Tools of interest
1. Wellways and Collaborative Centre grant preparation	Grant preparation: This project explored material for future implimentation and grants for this toolkit	Cat Brasier (LE, Wellways), Rob Trewin (Wellways), Alicia Baker (Collab Center) (n=3)	New project	All
2. Evidence in practice – Wellways Lived Experience Strategy	Envromental scan and literature review: This project is a part of the foundations of Wellways Lived Experience Strategy	Wellways Lived Experience Director and Lived Experience Leadership team (LE, n = 7)	New project	Connect and Identify, Power, Action List and Six Steps of the Research Lifecycle
3. Evidence in practice – Research and Evaluation Framework	Organistional/ Translational research: This project reviewed a translational and Lived Experience research framework	Cat Brasier (LE - Wellways) and Gerard Reed (Director of Buisness Development) (n = 2)	Final stages	Connect and Identify, Action List and Six Steps of the Research Lifecycle
4. Wellways research mentoring projects	Organisational/ translational research: An organisational development project	Lived Experience Community Support (LE, n = 1)	Planning stage	Connect and Identify, Power, Action List and Six Steps of the Research Lifecycle
5. Wellways Local MH/WB (Shepparton) and Horses for Hope project	Service/partnership evaluation: A partnership and service evaluation	Cat Brasier (LE, Wellways), Rob Trewin (Wellways), Sally Whitelaw (Wellways Locals) (n=3)	Moving from method development to conducting evaluation	Connect and Identify, Action List and Six Steps of the Research Lifecycle

Each projects' team members received a copy of the "Working It Out Together: A toolkit and workbook for Lived Experience-centred mental health and wellbeing research practice" and draft concise workbook. An introduction to the toolkit was held with the project team by Dr Brasier. Project teams were invited to work through and discuss the concise toolkit, provide feedback and have a go at the workbook exercises that they thought were right for their projects. Additional research mentoring, feedback and workshops were provided as needed by Dr Brasier. Each project continued to meet and work independently between sessions.

Data collection

Data collection was completed by the project lead (Dr Brasier - Consumer Lived Experience) and used collaborative and collective methods. Data collection included:

Feedback log: A feedback log was used for each project where they received a copy of the concise workbook and were able to try exercises and make suggestions by writing and leaving comments directly into their copy of the concise workbook. This was most often done using a co-creation technique where the toolkit was shared on a using a 'share screen' and a scribe made notes directly into the concise workbook on behalf of the team that reflected the groups discussion. This was shared with team members at the end of every meeting. Further feedback and suggestions were invited.

Focus group: 30-60 min online focus groups were held at the end of the project to capture additional feedback from the participants who tested the concise workbook. The semi-structured interview schedule is detailed in the Appendix. The Lived Experience Environmental scan also reflected on an additional question about the impact of research mentoring and skill building. Those who could not make the focus group were offered an interview or alternate feedback pathway.

Interviews: 30-60 min interviews were offered to individuals who were not able to attend the final focus group or when there was only a single researcher in the project. This included intersectional experts, Lived Experience leaders and project leads from previous phases of this research program. This component replaces the satisfaction survey that was originally proposed to collect richer more detailed data.

Data analysis

Transcripts and recordings from the feedback interviews/focus groups, plus the comments from the feedback log, were compiled and summarised by the researcher (see Appendix). The project lead and emerging ally researcher reviewed these and summarised the key feedback and highlighted actions that should inform the updated concise workbook and broader program of research. The summaries were reviewed by at least participant from each project as a form of member checking and validation.

Results

A summary of the activities conducted during the pilot

In total, five projects were included in this pilot. See Table 2. for a breakdown of pilot activities.

Table 2. Pilot activities

Research projects (n = 5)	Key pilot activities	Final status of project	Stages/ Tools explored
1. Wellways and Collaborative Centre Grant preparation	5 pilot sessions CEO meeting University of Mlbourne/ Collaborative Centre presentation/event Feedback focus group	In development	All
2. Evidence in practice – Wellways Lived Experience Strategy Envromental scan and literature review	7 pilot sessions – team 4 one-on-one mentoring sessions 3 Research skills workshops Feedback interview - Project lead Feedback focus group – Project team	Early development, progressing towards next phase on time	Connect and Identify, Power, Action List and Six Steps of the Research Lifecycle
3. Evidence in practice – Research and Evaluation Framework Organistional/ Translational research:	4 pilot sessions Feedback interview	Final revisions	Connect and Identify, Action List and Six Steps of the Research Lifecycle
4. Wellways research mentoring projects Organisational/ Translational research	1 pilot session The participant was included in project 2's focus group	Suspended due to organisation changes after first session	Connect and Identify, Power, Action List and Six Steps of the Research Lifecycle
5. Wellways Local MH/WB (Shepparton) and Horses for Hope project	2 pilot sessions 1 feedback interview	In progress – Delays encountered	Action List and Six Steps of the Research Lifecycle
Additional feedback interviews			
Intersectional feedback session	1 feedback interview	NA	All
Lived Experience Leader feedback	1 feedback interview	NA	All, focus on Action List

Findings from the feedback log

The comments from each pilot project were recorded into draft versions of the concise workbook, these have been collated and presented in the Appendix. Key feedback included:

- Efficient sign posting between the toolkit/workbook and the concise workbook, this is especially important to some readers who have English as a second language who want to confirm that they have understood the terms and contexts correctly.
- Reorder the contents of the report, workbook/toolkit and concise toolkit to reflect the restructuring of Connect and Identify and Power.
- Add the Lived Experience Action Log in with key tools at the start of the full workbook/toolkit and report, as well as the concise toolkit.
- Overall, the language is suitable for a range of audiences including those who are new to Lived Experience or research, although additional capability building will be required to foster mutual understanding
- The concise workbook should flag that it can be used flexibly

Summary of findings for each project in the evaluation

This section presents a summary of the data from evaluation interviews/focus groups for each project in the pilot. This is followed by a summary of other feedback gained during the pilot.

Project 1: Wellways and Collaborative Centre grant preparation

The intention of this pilot was to review the toolkit/workbook and concise workbook as if preparing for a grant. The team explored potential grant options and met with a member of the La Trobe University grants department. Although this meeting identified that there were no suitable grant options at the time, it highlighted the potential role of philanthropic grants, the Ideas grant scheme and grants relating to innovation as technology as future opportunities.

"And it was like a fidelity project too. It wasn't just this is the gold standard of how you should do it. It was that we did it, so we can show you how it worked." - Collaborative Centre lead

The importance of Lived Experience leadership and engagement from the start of a project

"*I'm thinking of it from the Lived Experience perspective, the whole point of doing the toolkit is that the outcomes will be so much more meaningful to the Lived Experience community... And I think they can have more ownership over the project and the outcomes of the project."* - Collaborative Centre lead

- Projects often do not consider people with Lived Experience until they have progressed their research significantly. This can lead to low levels of Lived Experience participation and missed opportunities. These workbook exercises challenge researchers to include people with Lived Experience from the project's conception

- These workbook exercises support research teams to increase Lived Experience engagement and leadership in research that build the research capabilities in the Lived Experience community – moving from transactional to mutually beneficial co-operative relationships
- Utilising two social work student placements and mentoring them to work from an ally designated point of view was key

The value of creating a practical plan and involving partners

"It was good to then actually get to do the some of the activities like the Intention and Impact Statement by thinking about a project in the future, if we did get a grant. I really enjoyed that process, "walking the walk" as if I was on a research team." - Collaborative Centre lead

- The meeting with La Trobe University's grant team provided a tailored discussion about grant opportunities, funding trends and future supports. This was experienced as very helpful, it demonstrated the importance of having formal relationships between service delivery organisations, government and universities
- The role of university partnerships and student placements in supporting the toolkit and translational research is essential
- The potential to use the foundations outlined in the workbook/toolkit (e.g. 'What do we mean by Lived Experience?' (Toolkit/workbook – Chapter One); the spectrum of Lived Experience – "designated", "informed", "not intentionally informed by Lived Experience" and "does not have a Lived Experience that speaks to the research question" (Toolkit/workbook – Chapter One); dual consumer and carer Lived Experience (Toolkit/workbook – Action 4); how to clarify and articulate what Lived Experience a project or service is addressing (Workbook Exercise 4).
- Implementation and future grants should follow and build on the toolkit and workbook. Members of research teams may need to be explored once grants are identified to reflect the criteria, proposed project and strategic strengths of the team (e.g. shared publications/projects).

Creating spaces to innovate that are relational, meaningful and fun

"I liked having the toolkit all together. I think I got lost a bit in all the text of the larger version (toolkit/workbook), but at the same time there was things that was good to have contextualised in the larger version." - Collaborative Centre lead

- Working through the workbook was a rewarding, helpful and an enjoyable experience
- The value of exploring the Lived Experience Intention and Impact Statement in-depth was purposeful and highlighted opportunities and gaps
- Further discussion highlighted practical considerations for researchers such as the role of Ethic Committees, remuneration processes and supports for Lived Experience people participating in research teams
- The toolkit/workbook and concise workbook supported the team to venture outside of traditional researchers' ways of working and challenge and current thinking

Project 2. Lived Experience Strategy – Environmental literature scan

A project lead perspective

Satisfaction

"I think that that's one of our main learnings to take forward…is having really high-quality structured guidance gives people confidence and seemed to take away a lot of stress and uncertainty." - Project Lead

Overall, high levels of satisfaction with the concise workbook were expressed from the perspective of a project lead. This pilot was effective in supporting this Lived Experience team to build confidence in research and their ability to tackle the project, and made the project feel more achievable. It led to a high standard of work by increasing the team's engagement with peer reviewed and grey literature and research methods, this has led to a broader culture shift and enthusiasm for connecting to evidence and research.

Workbook exercises

"In Lived Experience we often jump ahead so many steps and we actually haven't asked ourselves some of those fundamental questions, so I really liked how some of that was really clarified. I really liked how there was really clear definitions, I think has particular use across projects." - Project Lead

- The Lived Experience Intention and Impact Statement was a great way to start the project and helped the team clarify key concepts and considerations (e.g. language, definitions) at the beginning of the project
- The Lived Experience Intention and Impact Statement helped the team to identify who was most impacted by the research question with clarity and ease, looking past mental health participants and including First Nations, CALD, carers and other intersectional groups
- The definitions provided by the workbook/toolkit and concise workbook added clarity and a great foundation to move the work ahead
- The workbook exercises helped articulate many Lived Experience practices and ideas that can be skipped over or take for granted
- The team hopes to come back to the workbook exercises as they continue to develop their project and incorporate it as an integrated part of their projects moving forward

Having a structure step-by-step approach

"I thought that was a really useful process to go through, and it was something that laid some really great foundations for the project." – Project Lead

- The Action list and introductory session by the Lived Experience researcher helped the team identify what support and skill development they would need early in the project
- Boosted confidence about what needed to happen and (approximately) what order or stage of the research this might happen in

Research mentoring, workshops and skill development

"The workshops were really, really useful for skill development…all the feedback I've received was that they were very helpful and were able to open up a space where we could learn research skills, as most of us hadn't worked on research projects before." – Project Lead

- The combination of the toolkit/workbook and concise workbook, plus the mentoring (group and one-on-one) and skill development workshops were essential to the impact and experience of the team members. It would not have been as impactful or meaningful if it was only the concise toolkit
- It was important to take a bespoke approach, meet one-on-one and as a group to mentor and develop skills. This allowed the group to ask questions and share screens so that they could do things together
- Mentoring and workshops were bespoke and less formal than traditional lectures or classes

The on-going impact of having undertaken research skill building

- Contributed to a seminal Lived Experience and organisational projects (e.g. a Lived Experience Strategy) and grounded it in evidence and larger dialogues about Lived Experience. It is hoped that this will lead to better outcomes for the people who use Wellways services and their families/carers/supports/kin
- The team has increased research skills and confidence in participating in research, and has experienced it as a place where they can contribute and belong

Areas for development and consideration

- Research language in mentoring and workshops may need to be introduced at a pace and in a way that makes sense for people who are new to research
- Feeling empowered to jump around the toolkit and use part of it at the same time (or in a different order) could be increased
- Not all sections resonated or were helpful depending on the project

A Lived Experience team perspective

This section summarieses key feedback from the broader Lived Experience Leadership Team that participanted in this pilot.

The implementation of the toolkit and workbook must be accompanied by mentoring and support

"I know that I personally I really valued the opportunity to dive deeply into particular aspects, and also to have that shared space for questions." – Lived Experience Community Support Leader

- The toolkit provided a common ground and an excellent foundation for the Lived Experience team to explore research and how to conduct their project

- Early feedback indicated that after the toolkit/workbook was introduced that the team also needed:
    - weekly team meetings and work plans to drive the work forward
    - many in the team were early in their research skills journey and so bespoke and accessible approaches were essential
    - mentoring that connected research practice skills with Lived Experience values and culture was key
    - three research workshops were included to address the specific research capabilities that the team needed for their project. These focused on practical skills and research techniques
- Ways to integrate using the toolkit/workbook with research support and team process could be streamlined, it was good that the pilot was responsive but it was clunky at the time
- This project joined the pilot at the time they commenced the project, the team acknowledged that this meant that this limited their use of the workbook to Connect and Identify but expect to return to it as they continue to conduct their project
- A combination of one-on-one and team supports from the project lead was appreciated and experienced as having a real impact on how quickly and confidently the team could progress their work
- "Unofficial" mentoring and support in addition to the other supports were really helpful
- One-on-one and small group mentoring and workshops aloud people to ask questions that would feel "silly" to asking in front of a bigger research team, especially one with professional researchers

The pivotal role of the Lived Experience Expertise

"I think sometimes when we do this work, we can jump ahead and make decisions based on assumptions, whereas going through the toolkit really forced us to take a step back and consider 'why' and 'who'." - Consumer Practice Lead

- The workbook exercises identified which Lived Experience voices might be missing in the team/project by facilitating discussions that intentionally specified and unpacked "Lived Experience of what?" (e.g. carer, consumer, intersectional etc). This can easily be skipped over by Lived Experience teams as well as researchers
- It was very validating and important to see Lived Experience practices and values written down and integrated in to the toolkit and workbook
- The Lived Experience Intention and Impact Statement should be used throughout a research project, it is an important anchor

"*The foundations of research is built upon formal qualifications, and that is incompatible with our understanding of Lived Experience expertise, and so that not only is there some really practical things that can be done, but I think there's also a piece there around how Lived Experience researchers can be supported to do this work that is more accessible and inclusive.*" Lived Experience Community Support Leader

Building a toolkit that is adaptable and useful for all researchers

"You know, it's where Wellways is sort of headed around these relational models of working. For me this has been one of the best projects I've been involved in this year. I love doing stuff with other people, working and learning, working it outtogether…and this has given that opportunity to do that." - Family Carer Leader

- The toolkit presents the research stages and Actions in a linear way, this is helpful but the concise version need to better emphasise that this should be implemented flexibly and in a way that works for each project
- The toolkit/workbook and concise workbook did a good job at fostering Lived Experience-centred research as a relational and collaborative process
- Suggested adding more Dr Cat commentaries to connect the research stages and Actions to a personal and relational voice
- The Wellways 6 steps of research graphic was very helpful. The toolkit and workbook could use more graphics (e.g. and image-based content), there is a lot of writing
- The team agreed that Connect and Identify and Power could be reorganised so that many of the Actions were re-homed under Power (e.g. intersectionality, access and diversity etc).
- It contains orientating information and is presented in a way that could help mainstream (i.e. non-Lived Experience) researchers understand Lived Experience culture, practices and values

"I just think it's such a delicate balance, this one. Because you know the audience is ultimately mainstream researchers, so it has to be written in a way that they're going to understand, and things are more categorical than probably we would write for our own audience." – Co-production Lead

Project 3. Reviewing a Research and Evaluation Framework

As Wellways Executive Sponsor for this program of research Gerard has overseen and supported the development of this pilot. In this pilot he paired up with the project lead to review their Lived Experience-centre research and evaluation framework and strategy that has been developed. Working on the forefront of Lived Experience and service participant-centred research this pilot project found great value in reviewing their work so far using this toolkit, noting there were no suitable tools or frameworks that could guide their project when it started. It is anticipated that during the initial launch phase many projects will be adopting this toolkit and workbook mid-project. This team found that it had good utility when used this way and recommend that ideally it should be used from the start of projects/programs of research as this help clarify and expediate the teams thinking.

Living our values

"When you're asking these questions, you try to put yourself in someone's shoes… it's then quite personal and it's impactful personally." - Gerard

- This toolkit is an extension of Wellways work as sector leaders (nationally and internationally). It embodies their commitment to the people who use their services (and their families, supporters, carers and kin) and the role they should play in driving service delivery and development
- This toolkit reflects Wellways values and provides a practical process to translate these values into practice across the organisation in a way that has not been possible before
- It reflects the commitment for Wellways Executive team for taking practical steps to embed and drive change by centring the consumers, carers and the community
- It demonstrates the importance of Executive and Senior Management teams engaging in and leading Lived Experience and translational research

Tools to implement leadership and vision

"[The Lived Experience Impact and Intention Statement (Workbook Exercise/Action 1)] absolutely set the tone for the rest of the conversation!" – Gerard

- The exercises were challenging and at times confronting but the process led to personal realisations about the unique and irreplaceable value of Lived Experience voices, especially from people who use services
- The Intention and Impact Statement allowed the team to review their project to ensure that it truly aligns with Lived Experience-centred research and highlight/affirm gaps and strengths
- The Intention and Impact Statement articulated the impact of not including a range of Lived Experience perspectives and supported the team to re-think and affirm how this can be done moving forward, in this project and across the organisation

The value of providing mental health services and researchers with the tools to drive transformation

"This has potential to transform research and evaluation in our space and really impact us by starting to ask the right questions and do something that we've not been able to do in this sector for the 20 years and actually talk about real outcomes and outcomes that matter to people." - Gerard

- The project valued how the Intention and Impact Statement intentionally enquires into whose 'voices were missing' and what the impact of that is
- The Intention and Impact Statement ensures that the conversation starts by considering the needs, priorities and outcomes important to the people who will be most impacted by the research or service
- These exercises instil respect for the people impacted by the project by asking intentional, purposeful and practical questions

Project 4 and 5. Wellways research mentoring projects and Local Mental Health and Wellbeing Local (Shepparton) and Horses for Hope project

Unfortunately, both of these projects were impacted by organisational changes during the pilot period. Initial feedback from the Horses for Hope team found that we completed many of these Actions or similar processes, although a more formal would have been very valuable. Rob (Horses for Hope evaluation/Collab Centre Grant) and Kayla (mentoring project/Lived Experience Strategy Environmental Scan) have provided their individual feedback through other pilot projects they participated in (See Appendix results table).

Other feedback

Intersectional expert (CALD and LGBTIQA+SB)

- Both the full workbook and toolkit (from Phase 2) and the concise toolkit (from Phase 3) are important and should like together seamlessly so that it is easy to swap between both
- Understanding words like 'culture' or words that can have another meaning should be used thoughtfully, ensuring that there is enough context to understand what is meant
- Considering the end-user and diversity is important

Lived Experience leader interview (Mary O'Hagen)

- It is great to see practical Lived Experience projects like this happening
- The language, concepts and values are Lived Experience aligned
- Many of the Actions in Stage One could be re-ordered and placed under Power
- Participatory methods could be re-ordered and placed first under Methods

Meeting with the CEO's of the Collaborative Centre and their team

- This program of research fills an important role in building translational capacity across people with Lived Experience, research and service delivery/development
- Implementation planning and future opportunities need to be explored
- Advocating to grants bodies (e.g. MRFF, ARC) and universities for change, and adopting the learnings and resources from this program of research is key

Collaborative Centre and University of Melbourne presentation

- This program of research is an important part of the Collaborative Centre and consortiums strategic goals, and should be a key feature of the next financial years 12-month plan and on-going plans
- Many of the key definitions, conceptual underpinnings and ways of working are important to the consortium partners, and could contribute to a clearer understanding of Lived Experience which is vital for practice and mental health practice

Discussion, recommendations and conclusions

This section provides a brief discussion as well as the recommendations which have arisen from this pilot. The conclusion reflects on the development of this program of research and its potential impact moving forward.

Discussion

The results from the feedback logs and evaluation interviews/focus groups found that the toolkit/workbook and concise workbook have many strengths and is suitable for people who were new to research, especially those working from a Lived Experience perspective. Most people felt that it provided a structured approach that helped them consider the needs of their project and have confidence that they could tackle new skills. Feedback also suggested that it was helpful to have foundational concepts and definitions consolidated into one place, and to know that they could customise these in their projects. Lived Experience participants felt that the workbook and toolkit captured and communicated Lived Experience language, concepts and values well, and promoted working in a relational way. Additional reflections by people who are able to contribute a First Nations and intersectional perspectives will be important moving forward. This pilot highlighted that on its own the toolkit/workbook and concise workbook were helpful - but that the greatest impact was from delivering it alongside research project team meetings, one-on-one and group mentoring and support (including research workshops).

Key changes to the concise workbook include (please see updated draft):

- Increased sign posting and links between the concise workbook and the toolkit /workbook and report
- Re-ordering of Connect and Identify and Power
- Brief "Dr Cat Commentaries" added to frame the workbook in a personal Lived Experience narrative and increase links to original toolkit/workbook
- Brief prompts to support teams to use this workbook as a guide but to use it flexibly
- Addition of the Lived Experience Action Log as a key tool in the workbook, original toolkit/workbook and report

Recommendations

Recommendation one – Easy and accessible navigation. The original toolkit/workbook and concise workbook should use digital links (or visual markers) so that people can quickly and easily move between them. This is especially important to people who speak English as a second language and emerging researchers. It was also key to add some concise but effective signposts and instructions to support teams to interpret the workbook in the way that is flexible and right for their specific project.

Recommendation two: Restructure research stages "Connect and Identify" and "Power". Advice by Mary O'Hagen highlighted that these stages could be re-ordered to reflect that Lived

Experience and intersectional expertise, accessibility and inclusivity, research culture and the research team's mental health and wellbeing as inherent parts of how power is created and shared, (see Appendix – original and updated Actions). It was also noted that the "Lived Experience Action Log" should be added to the concise workbook, this was a key feature of Phase Two and is useful in all meetings where Lived Experience is being centred, including service design/delivery meetings.

Recommendation three: Provide mentoring and research skill development alongside the implementation of the toolkit/workbook and concise workbook. Although each project started with a session which introduced the concise workbook and overview of the original toolkit/workbook, participants found this more helpful and meaningful when paired with research mentoring and skill development. This was especially important for Lived Experience participants who wanted to integrate their discipline perspective with critical research skills. This was done successfully using one-on-one and group mentoring/skill development. This should be done by an experienced Lived Experience researcher and could include support from non-Lived Experience researchers. This could be supported through PhD and translational research programs where research teams can learn together and co-reflect on their technical and critical stances.

Recommendation four: Share what we learned from using Lived Experience-centred research methods to create safe and positive experiences for participants, and rich effective research outputs. Additional feedback about the overall program of research indicated that there are valuable learnings connected to **how** we conducted this program of research and the way that good research techniques were combined with Lived Experience values. It is important for the Collaborative Centre to implement Lived Experience-centred research techniques and create opportunities for researchers to experience this and learn by being a part of projects where they are 'working it out together'.

Recommendation five: Translate the key concepts of this program of research beyond research and evaluation. This translational program of research includes key information, concepts and definitions that are important but often insufficiently understood across the broader mental health eco-system (e.g. Lived Experience designated roles, dual consumer/carer perspectives, intersectionality, trauma informed practice, cultural integrity, accessibility and inclusion etc.), including service design, delivery, management and practice. It also contains content that may be of value to Lived Experience organisations/peak bodies and researchers.

Recommendation six: Co-create a practical plan to launch and rollout this program of research over the next 12months to 5 years. A plan for the first 12 months should include finalising the materials and publishing them on the Collaborative Centre's Knowledge Sharing Platform. A public launch (on-line and/or in person) and dissemination plan is recommended and should include Lived Experience leaders, organisational leaders, consortium partners, members of their Lived Experience workforce, universities and academics, researchers and other key stakeholders. We also recommend connecting with university, state and national grant bodies to explore how this program of research can be shared, implemented and

contribute to the development of Lived Experience-centred research (e.g. our Lived Experience-centred reporting guideline, Lived Experience Action Log and accountability tools, etc.). A roll out and resourcing plan should be developed that identifies future funding, partnerships, grants and other opportunities.

Limitations and future opportunities

This brief pilot added important refinements to the toolkit; however the pilot period was short, worked predominantly with research projects that were in the “Connect and Identify” stage and had a focus on literature reviews to establish the grounding of the project. Most of the participants were Lived Experience. Future opportunities include longer study periods, teams which have a combination of Lived Experience, service and research staff and those working on interventions studies or service evaluations.

Conclusion

This program of research has contributed a significant and original piece of translational research that is grounded in Lived Experience and embodies the vision of the RCVMHS. A truly translational piece of work it has potential to impact training, education and the mental health practice as well as research. The project demonstrated the effectiveness of Lived Experience-led projects to create transformative research. Implementation should continue the ‘walk-the-walk' approach used in this project and bring together consortium partners, consumers, family/carers/supporters/kin and other key stakeholders together to “work it out together”.

APPENDIX

Evaluation interviews/focus groups – semi-structure interview schedule

Here are the evaluation discussion points for today's reflection:

1. Impact: how effective do you think these tools are at helping researchers embed Lived Experience leadership and engagement in mental health research practice? (How did these tools change how you conducted your research? What did you learn about integrating Lived Experience into your research project? Did these tools help or hinder the research process?)

2. Experience: what was it like to design a research project using Lived Experience -centred tools? (what were the challenges and benefits?)

3. Satisfaction: how satisfied were you with:

A. The toolkit exercises and information overall?

B. How information about Lived Experience was integrated in the tools (i.e. exercises and information)?

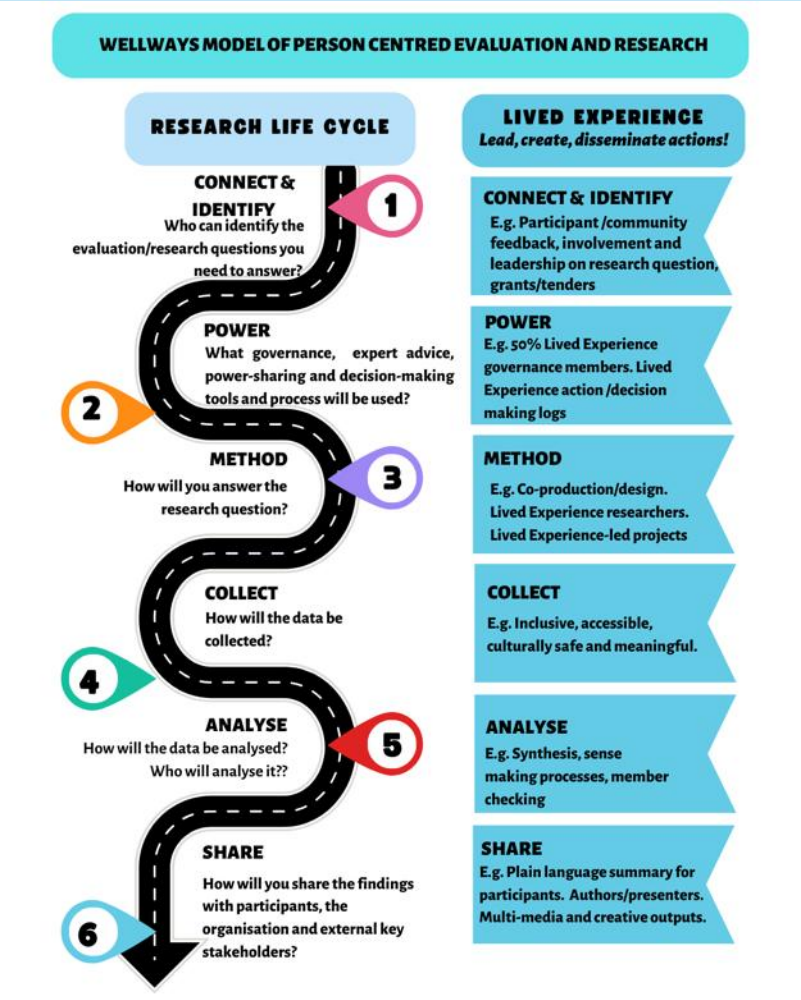
C. How helpful these tools help or hinder the research process?

D. Research mentoring and workshops was a specific thing that we tailored to your team. What impact did this have? [For Lived Experience Strategy – Environmental and literature scan only]

Wellways “Six Steps of the Research Life Cycle”

This workbook is based on Wellways “Six Steps of the Research Life Cycle”.

Wellways “Six Steps of the Research Life Cycle



Working It Out Together - Research Actions

Updated

Proposed changes to the order of Connect and Identify and Power.

STAGE ONE: CONNECT & IDENTIFY

Action 1. Create a Lived Experience intention and impact statement

Action 2. Harness community and industry relationships

Action 3. Identify a research question and validate that your research question is important to your community

Action 4. Form a Lived Experience-centred research team

STAGE TWO: POWER & DECISION-MAKING

Action 5. Embed Lived Experience and intersectional expertise throughout the project

Action 6. Create a plan to ensure that your research project is accessible and inclusive

Action 7. Create a Lived Experience-centred research culture and processes that unites the team

Action 8. Create a plan to support the mental health and wellbeing of all members of the research team

Action 9. Create a plan to support the mental health and wellbeing of all members of the research team

(ETC.)

Original

These are the original Actions from Phase Two.

STAGE ONE: CONNECT & IDENTIFY

Action 1. Create a Lived Experience intention and impact statement

Action 2. Harness community and industry relationships

Action 3. Identify a research question and validate that your research question is important to your community

Action 4. Embed Lived Experience and intersectional expertise throughout the project

Action 5. Create a plan to ensure that your research project is accessible and inclusive

Action 6. Form a Lived Experience-centred research team

Action 7. Create a Lived Experience-centred research culture and processes that unites the team

Action 8. Create a plan to support the mental health and wellbeing of all members of the research team

STAGE TWO: POWER & DECISION-MAKING

Action 9. Create a plan detailing how the research team shares power and makes decisions

STAGE THREE: METHOD

Action 10. Develop a research method that is rigorous and Lived Experience-centred

Action 11. Explore Lived Experience and participatory research methods

Action 12. Explore Expert Advisory and Decision-Making Groups, committees and governance groups

STAGE FOUR: DATA COLLECTION

Action 13. Create a Lived Experience-centred data collection plan

STAGE FIVE: DATA ANALYSIS

Action 14. Create a Lived Experience-centred data analysis plan

STAGE SIX: SHARING

Action 15. Creating a Lived Experience-centred dissemination plan

Action 16. Report your research project in a way that is Lived Experience-centred and rigorous

STAGE SEVEN: EVALUATION & IMPACT

Action 17. Evaluate the impact of engaging people with Lived Experience as leaders and active contributors in your research project

Toolkit – Workbook log/feedback

Document: Working it out together WORKBOOK WIP Collab Centre Grant – Alicia, Cat and Rob

Section	Context	Comment/s
Title page	Document title	I love the title. It feels very collaborative and welcoming
Recognition of Lived Experience	"Dr Cat commentary"	Love the Dr Cat commentary too. It brings what we are talking about to life for me. It's like breaking the 4th wall
How to use this workbook	Section title	Thinking about going for a grant and implementation. Having an instructional/orienting content at the beginning in the form of a video, talk through or workshop. First one is instructional, but it will become more peer-to-peer as the project continues. How will we provide that orientation and instruction when going for a grant etc?
How to use this workbook	Section title	This is orienting, I like it
How to use this workbook	"This workbook aims"	Need some signposting/a box that people might choose to use their own language as they continue through their project.
How to use this workbook	-	Add web links for grey highlights
How to use this workbook	Graphic on page 5	Maybe this needs a heading/title that it's the 6 (or 7!) steps?
Language	Section title	Reminder, this is how we looked at it in the toolkit, please use the language that works for your project. Need to define it for their own project. Snippets around flexibility, this isn't mandatory. A thread of narrative through the work reminding to choose. We are providing a starting point. People also might need extra ways of working.
Language	"What do we mean by 'Lived Experience'?"	The definition is quite tangible with the use of "significant" and "life changing" compared to other definitions I have seen. It's also strengths focused.

Language	“What do we mean by designated Lived Experience roles?”	This is useful to me as someone from a non-LE perspective
Workbook exercises – Research stage one – action 1	“Gather as a project team and explore these questions:”	Gets the team to talk about what LE is from the beginning. Often this stage will be with traditional researchers and not with a LE person/researcher.
Workbook exercises – Research stage one – action 1	“Why is Lived Experience important to this research project?”	This could inform the first para of the grant
Workbook exercises – Research stage one – action 1	“What roles and input will people with Lived Experience have at each step of this project?”	Try and build in a PhD scholarship, a LE PhD. This would require a large grant.
Workbook exercises – Research stage one – action 1	“Associate Investigators would be Mary O’Hagan, or Anita (who could gain industry experience and establish their track record).”	Collab Centre could think about whether they would want investigators on the grant, such as Sarah or if we would just be the primary site. Evidence of working together, publications you have authored together, the prestige of each publication and grant money people have brought in. Sites are Wellways and Collab Centre and La Trobe. Letter of support.
Workbook exercises – Research stage one – action 1	“Group most likely to miss out on is checking with service users if they think this would be helpful.”	Cat and Robert to check with Wellways users. Potentially Sally. Early focus groups around what people in services think are important for people to know. Alicia and Cat to think about this too - this could particularly be around accessibility and inclusion.
Workbook exercises – Research stage one – action 1	“How will this research project help people with Lived Experience in their day-to-day lives?”	Translational piece would be a piece thank links participants to the impact of research if it is a bit further away. Developing the evaluation and impact processes. (depends on the size of the grant) The impact is still a bit indirect, need to signal this
Workbook exercises – Research stage one – action 1	“We will create an opportunity for people with Lived Experience to be listened to, share what they know and help other people. It is unique to be valued for your Lived Experience.”	An outcome for us is to write this into a statement that we can use in a grant. That will be one of the main parts of the report. Can keep re-iterating it.

Workbook exercises – Research stage one – action 3	“Action 3. Identify a research question and validate that it is important to your community”	This is what our pilot does
Workbook exercises – Research stage one – action 3	“Then describe how you will validate your research question. What steps will you take to verify that your research question is important to your community?”	I like this because it forces the team to be explicit instead of making assumptions based on the above (existing research)
Workbook exercises – Research stage one – action 4	“Workbook Exercise 4. Mapping opportunities to integrate Lived Experience and intersectional leadership and wisdom throughout the research project”	I found this really helpful in the context of thinking about the inclusion and exclusion criteria of grants It was quick to do.
Workbook exercises – Research stage one – action 4	“Intersectional communities and experiences ???”	This depends on our grants. It could be First Nations specific
Workbook exercises – Research stage one – action 4	“Within this Lived Experience cohort (consumer/families, carers, supporters and kin) our research question has a specific focus on (respond to any that relate):”	It doesn’t at the moment, but it could - e.g. psychosis Or we could change this for a research problem Neuro diversity for example
Workbook exercises – Research stage one – action 4	“Location (e.g. country, state, catchment/service area)”	It has to have Vic focus
Workbook exercises – Research stage one – action 5	“What are organisational, industry and government guidelines about access and inclusion that should inform your research project?”	WE would put this in the grant. We already have an accessible version of toolkit. UN guidelines
Workbook exercises – Research stage one – action 6	“Action 6. Form a Lived Experience-centred research team”	It may be obvious to people who are used to working in LE-centred spaces, but for people new to it, this is so critical to support considering how to embed LE into the team itself instead of just consulting where possible
Workbook exercises – Research stage one – action 6	“Write a reflexivity statement. Consider the following:”	We need to think about this and see how other parts of the grant develop. Let’s make sure that we remind people that they don’t have to do everything. Pop in some signposts
Workbook exercises – Research stage one – action 6	“What other life experiences in the research team may impact/bias the study (e.g. discipline/training, reasons for	Great to consider competing factors and how they interact.

	doing the study, values, biases, benefits of doing the study etc.)?”	
Workbook exercises – Research stage one – action 7	“Create a translational plan (i.e. Lived Experience, research, service delivery/development) that details how the project team will embed this wisdom throughout the project; this should be complemented with an accountability tool”	Super important. I think drawing attention to using an accountability tool is a game-changer.
Workbook exercises – Research stage one – action 7	“Create a power sharing and decision-making process for the project team”	Love it Does this overlap with Action 9?
Workbook exercises – Research stage one – action 8	“Workbook Exercise 8. A mental health and wellbeing plan for the research project members”	Really important to have these in place at the outset. I think this is something than can be overlooked.
Workbook exercises – Research stage three – action 11	“Co-production, co-design and participatory methods – Our top 3 examples!”	I like how this encourages the group to scope these out for themselves, relevant to their research question. With the addition of the examples in the toolkit/report appendices.
Workbook exercises – Research stage three – action 12	“Will members be contributing to decisions (i.e. Expert Decision-Making Group) or only providing advice (Expert Advisory Group)?”	Really important to define this early on and manage expectations! Helpful to have this reminder built in
Workbook exercises – Research stage four – action 13	“What support, mentoring and training will be required so that the Lived Experience contributors/co-researchers can complete high quality data collection?”	This toolkit project is the first time I have seen a reciprocal benefit for people with LE to come away from their involvement having gained something for themselves in the short-term.
Workbook exercises – Research stage six – action 16	“Key Question: How will you make sense of the information that you have collected and decide what it means? Who will be involved in checking that this interpretation reflects the perspectives of the research participants?”	The same key question is on page 17
Workbook exercises – Research stage six – action 17	“Table 2. Evaluating how Lived Experience was integrated throughout a research project”	My favourite part!

Document: Working it out together WORKBOOK Collab Grant - continued

Section	Context	Comment/s
Contents	"Contents"	The appendix can put in Reporting Guideline
Language	"What do we mean by designated Lived Experience roles?"	Talk literally - who.
Workbook exercises – Research stage one	"Research Stage One: Connect and Identify"	We felt the formatting and template Bec added worked really well here. Looks nice. You can tell when you hit the next section
Workbook exercises – Research stage one – action 1	"Why is Lived Experience important to this research project?"	Workbook formatting/printing - would it be better digital or printed and then with lines? Think about the settings use in PDFs so people can print it or write in it. Font size and font (readable). UN communication guidelines We check in with IT departments RE opening PDFs. Test run to see if it can open To think about the colours we use.
Workbook exercises – Research stage one – action 5	"Articulate how you will embed access and inclusion throughout your project"	Do we want to put the links back in?
Workbook exercises – Research stage two – action 9	"Workbook Exercise 9. Understanding how power impacts your research team"	Lived Experience Action Add as an example
Workbook exercises – Research stage three – action 12	"Action 12. Explore Expert Advisory and Decision-Making Groups, committees and governance groups"	Link to the report - TOR and other info
Workbook exercises – Research stage six – action 15	"The community (including First Nations and intersectional communities)"	Do we make these tick boxes? Add other?

Document: Working it out together WORKBOOK – Research and Eval Strategy – Gerard and Cat

Section	Context	Comment/s
Workbook exercises – Research stage one – action 1	"Workbook Exercise 1. Creating a Lived Experience intention and impact statement"	Is this something that we can do in little groups (GR/Cat) or does it need to be 50% LE? Do we need more time? Some 2-hour sessions Create sense checking? Flexible.
Intention and Impact Statement	Together we unpacked and worked through the Lived Experience Intention and Impact Statement	This was an in-depth discussion over several sessions, reflecting on a deep understanding of where we are and where we want to go. This will be developed and included in Wellways Research and Evaluation Framework.

Document: Working it out together WORKBOOK - LE Strategy

Section	Context	Comment/s
Working It Out Together Research Actions	"Action 6. Form a Lived Experience-centred research team"	Juliet thinks this is a good idea, this feels real to her We start in the org/experts, then build or retro fit LE on top on that Juliet likes working by writing right in the doc Juliet used to use a similar method -share screen and talking through - a good way to capture different points of view This feels like a thoughtful way to do this...inc. the walk through method It is a good way to make sure that people aren't missing a step - confidence building.
Working It Out Together Research Actions	"Action 7. Create a Lived Experience-centred research culture and processes that unites the team"	WE think this way of working helps develop culture WE stated doing this day
Language	"What do we mean by designated Lived Experience roles?"	Juliet loved this bit. A life changing experience and the use of that insight. It acknowledges everyone in the room
Language	"People who may be informed by personal experiences but may also draw on other disciplines/role requirements/professional codes of conduct (etc.)"	Clinicians who are not designated role, may resonate with them but maybe not as expertise.
Workbook exercises – Research stage one	"Research Stage One: Connect and Identify"	This feels like a clear roadmap 😊 Feels like you're learning No longer feels like I'm moving a mountain. Very clear, thoughtful. The tools you need to job properly and explanation why. Brings down the barrier

Document: Working it out together WORKBOOK LE Strategy continued

Section	Commentor	Context	Comment/s
Workbook exercises – Research stage one	Catherine Brasier	"Research Stage One: Connect and Identify"	Let's one activity a week as a focus, the rest of the time project updates
Workbook exercises – Research stage one – action 2	Catherine Brasier	"Workbook Exercise 2. Helpful friends – Connect to the knowledge, skills and expertise you need to excel"	Hannah and Jules have already done a key stakeholder
Workbook exercises – Research stage one – action 3	Catherine Brasier	Action 3. Identify a research question and validate that it is important to your community	Influenced by the scoping of the project - movement of the older knowledge holders. How does this one fit? Holding pace together. Working across project parts. Consistency. Go back to Exec Sponsor for clarity - what is the overall. We could do some on Monday, take to Mary and continue to discuss. Reflection time together, then come back next week.
Workbook exercises – Research stage one – action 4	Catherine Brasier	"Action 4. Embed Lived Experience and intersectional expertise throughout the project"	Jules to have a go and come back to the team next time. Following Monday.
Workbook exercises – Research stage three – action 10	Catherine Brasier	Add your examples here: Add 5 study processes	Let's explore this with Anita Might need to clarify these are study processes

Document: Working it out together WORKBOOK Mary 23.5.25

Section	Context	Comment/s
Working It Out Together Research Actions	"These Actions builds upon Wellways "Six Steps of the Research Life Cycle"."	Important principles we have a lot of LE communities, diversity, pw workforce. Involving that are most impacted is really important principles. E.g. If we do something like homelessness maybe If it's online you can have a big version – hyperlinks Presentation - could we consider making this more concise. 8 actions in stage 1 and 1 on stage 2. Could some of the Actions in Stage 1 could they be in stage Or is there a lot in the first stage. Could we combine some of stage one into stage 2? I think this is a good idea. We could update the workbook this way too "Action 9. Create a plan detailing how the research team shares power and makes decisions" could come after one of these
Working It Out Together Research Actions	"Action 10. Develop a research method that is rigorous and Lived Experience-centred"	Is also about research processes Cat will check this out
Working It Out Together Research Actions	"Action 11. Explore Lived Experience and participatory research methods"	Could we pop this first in this section?
Working It Out Together Research Actions	"Action 12. Explore Expert Advisory and Decision-Making Groups, committees and governance groups"	To review that governance also sits with power Is this the right spot - should that be in power.

Document: Working it out together WORKBOOK - Intersectional feedback – BB

Section	Context	Comment/s
Working It Out Together Research Actions	"Working It Out Together Research Actions"	6 steps of research is fine. BB suggestions to use Actions from EAG 3. BB might give feedback about comparing end user perspectives about workbook/toolkit compared to this concise workbook. Had seen toolkit workbook. How are they complimenting but not confusing? Considering a wide audience. Is the relationship and connecting point clear? Seems pretty thorough so far. We have thought about more signposting. Likes the workbook language - like that we are asking them to do things - workbooks should be like that
Working It Out Together Research Actions	"Action 1. Create a Lived Experience intention and impact statement"	Sounds good
Working It Out Together Research Actions	"Action 2. Harness community and industry relationships"	You do this at the start as well
Working It Out Together Research Actions	"Action 7. Create a Lived Experience-centred research culture and processes that unites the team"	I think we did this really well in the EAG BB is moving between both documents at this point How do we keep the consistency of meaning - especially as an English as a second language point of view. That's how BB is used to working, and as a MH service worker. Wants to connect it to the right context. Culture means something different from a queer or intersectional perspectives - where as I'm thinking "work culture" (e.g. P&C) Flicking back to the workbook/toolkit really helps

		This is complicated b/c you don't know how people are going to use this. Can we have links that make it easier to go back and forth? Can we do some A/B testing? Need longer testing Communication plan - LE of different experiences/identifies - being able to choose. Making space for people to contribute (not just confident and big speakers) - we did this in the EAGs. Giving different ways of contributing? Can we explain/link that here? Recommendation: to create supports and workshops that allow us to share what worked well in the EAGs This is what set the culture! How we walked the walk - see the study documents and EAG plans/docs/updates.
Workbook exercises – Research stage one – action 1	"To see the full Action and information click here to go to orig toolkit/workbook"	Some form of a popout box and links between the 2 documents. Textbooks have great examples

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