Clinks guide to service user involvement and co-production:

SAMPLE PLANNING MATRIX

Sample planning matrix

➢ **What** do you want to involve service users in? A consultation, event, planning group, peer research, staff training? Something very general of interest to a broad range of service users, or something very specific to a particular service?	
➢ **Why** do you want to involve service users? Do you want to tell people something? To know what people think about something? Do you want them to help you plan a piece of work? Or meet funders' objectives?	
➢ **Who** do you want to involve? Current or ex-users of a service? Specific groups, such as young people or women? People with a geographical connection? Who within your organisation will be involved?	
➢ **When** do you want to do it? What are your timescales? Do you need to start or finish this piece of work by a certain date? Remember to allow time to plan, for feedback and identify next steps.	
➢ **Where** do you want to do it? Think of locations – virtual and physical – and accessible venues.	
➢ **How** are you going to do it? • How are you going to get answers for the questions above? • How are you going to plan for the work? • How are you going to recruit service users? • Have you thought about what service users might get out of the work? • Will service users or staff need training for the project? • Do you have a budget? • Who is going to do the work? • Do you have enough expertise in the workplace? • Do you need other expertise, knowledge or skills? • How are you going to advertise the work to service users? • How will you match service users' skills to the tasks involved? • What method(s) of involvement are you going to use? • How are you going to write up the piece of work? • Who needs to see the outcomes? • How are you going to feed back to service users? • Who is going to take forward the outcomes? • How will you evaluate the work?	