

Involvement Matrix – checklist for project leaders/researchers

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When using the Involvement Matrix in a dialogue on project interaction with a patient/experience expert, it is useful to take a number of steps. The following checklist gives these steps, which can be checked off as you go along. The checklist can be completed in any order you like.

Before the dialogue

- Read through the Involvement Matrix and its accompanying Practical guide
- Familiarise yourself with the five different patient roles
- Make a list of specific phases and sub-phases and potential project activities¹
- Print out the Involvement Matrix so you can visualise all the options for involvement
- Have a digital copy of the Involvement Matrix or the printed form to hand so you are able to record the arrangements you make during the dialogue

During the dialogue

- Introduce the project to the patient
- Introduce the various roles to the patient and check that the patient understands them
- Ask the patient a number of important open questions, such as:
 - What are your strengths?
 - What would you like to do in this project?
 - What would you be able to do in this project?
 - How far ahead do you want to plan your activities?
- Progressively work through the list of specific phases and sub-phases and possible project activities together²
- Make definite agreements about the actual activities for each phase of the project and record these on the form
- Plan a date for the next face-to-face discussion, the aims of which will be 1) to evaluate the interaction to date, 2) to make further arrangements for the coming phases and activities
- Arrange how you will keep in contact between two face-to-face meetings. Decide on the means by which you will communicate and how often.

After the dialogue

- Write down all the arrangements you have made and share them with each other
- Invite the patient to make any additions they would like, and maybe to return to the preceding discussion
- Maintain regular contact with each other

Follow-up dialogue

- Preparation: Take along the arrangements made previously
- During the dialogue: Evaluate previous arrangements. What went well? What could be done differently next time?
- Go through the previous points again (before, during and after the dialogue)

¹ This does not mean that the entire project has to be completely planned at this time. New activities will gradually emerge and these can be added and discussed as they arise.

² Decide together on how far ahead you want to plan your activities. This can differ between individuals: some people will want to plan week by week and others six months ahead.