Adapting a person-centred planning tool for collecting qualitative data on an Indigenous research project

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Abstract

Planning Alternative Tomorrows with Hope (PATH) is a person-centred planning (PCP) tool that draws on visual imagery. Originally used to assist individuals with disabilities to plan for the future, PATH aims to "unlock" the imagination freeing people to better picture a positive future whilst remaining grounded in the present. PATH has since been further developed by Indigenous communities to facilitate strategic planning; more recently being adapted for use in a Kaupapa Māori context, working with *whānau* (families), *hapū* (subtribes), and *iwi* (tribes). Our experience with PATH has been in its use as a data collection tool; specifically, in interviews with whānau. Our use of PATH draws on both Western and Kaupapa Māori approaches, building on Māori oral and visual traditions, in pragmatic ways. Using PATH, we triangulated qualitative data, fieldnotes, and case notes to evidence the effective prevention of chronic conditions among whānau. The advantages of using PATH included ease of adaption for a range of situations and validation of data with whānau at the time of interview. We believe this method is useful when working with whānau as it fits with Māori strengths-based values, is responsive to the worldview of participants, and is participatory.

Introduction

This paper explores the adaptation of a Person-centred planning (PCP) tool, Planning Alternative Tomorrows with Hope (PATH), for use as a research tool. It builds on the previous adaptive PATH work of Pipi and others (Baker, Pipi, & Cassidy, 2015) and describes how Whakauae Research for Māori Health and Development (Whakauae) has used a form of PATH in qualitative data collection with Māori whānau. We discuss the "fit" of PATH with a Kaupapa Māori research approach highlighting shared core principles. Specifically, self-

determining aspirations, the notion that social or whānau networks are critical to achieving wellbeing goals, and the belief in the ability of whānau to change their circumstances by working with their strengths.

Whakauae is an iwi-owned research centre with a focus on carrying out Māori public health research, evaluation, health services and health policy research. Accordingly, research projects do not proceed without ethics approval from either tertiary, health and disability or external advisory committees. As a team of researchers, we are continually reviewing our research practices to ensure the best possible fit with our stated values and principles (Whakauae Research for Māori Health and Development, 2017). At the same time, we are cognisant of nationally endorsed ethical research guidelines (Health Research Council of New Zealand, 2008; Hudson, Milne, Reynolds, Russell, & Smith, 2010) as well as the four key ethical guidelines derived from Ngāti Hauiti *tikanga* (protocols) that drive our work. These are *hauora tangata* (upholding a holistic understanding of good health); *maanaki tangata* (upholding high standards of care and respect for the people and organisations with whom we interact); *mātauranga* (knowledge as an enabler of growth and development); and *ngākau tapatahi aurere* (working with professionalism, integrity, dignity, diligence, and passion; Whakauae Research for Māori Health and Development, 2013). Informed by the guidelines noted above, we are committed to drawing on innovative data collection tools and methods to help ensure that our work is empowering, relevant, and affirming for our research participants. The adaption of the PATH tool for use in the research process offers one example of an attempt to ensure the inclusivity of our research practice. Our recent experience and learnings with the adaptation and use of the PATH tool is likely to be of interest to a wider audience and is therefore explored further in this paper.

Emergence of Person-centred Planning (PCP) tools. PCP tools have been developed and refined internationally and locally for use in different contexts. PCP emerged in North America in the early 1970s influenced by a group of like-minded people who wanted to improve services for people with developmental disabilities (O'Brien & O'Brien, 2000). By the late 1970s, its use had spread to Britain and, through joint trans-Atlantic refinement and adaptation, further evolved as a tool to help those with disabilities plan for their futures. During the period 1979 – 1992, various PCP models emerged to suit different situations. One such model, Planning Alternative Tomorrows with Hope (PATH) was developed by Jack Pearpoint, John O'Brien, and Marsha Forest informed by their practice in the disability sector in Canada (Pipi, 2010).

PATH as with other PCP models is strengths-based, transformative, and centred on the premise that people are functioning individuals that should not be labelled and judged by their health circumstances (O'Brien & O'Brien, 2000). PATH places the individual at the centre of planning for his or her own future, empowering the individual to take charge of changing their own situation. The approach recognises that the individual does not exist in a vacuum, and therefore that family and other social networks are likely to be an important factor in their planning (Sanderson, 2000). It draws on the use of visual imagery as a way of "unlocking" peoples' minds aiding them to better picture a positive future for themselves.

Adaption of PATH (PCP tool) in Indigenous settings. Adaptation of the PATH tool continued and, by early 2000, a Canadian Indigenous social service provider was using the PATH tool within its community as a "business, project and strategic planning" tool (Pipi, 2010, p. 2). On a visit to Canada in 2002, Pipi (2010) observed how PATH had been adapted for use in that Indigenous setting and saw the potential for its use in a Kaupapa Māori context. Initially, Pipi (2013) used PATH when working with individuals in Aotearoa New Zealand to facilitate personal planning. Later, when she became authorised to train and facilitate group sessions, PATH was adapted and used in different contexts including as a strategic planning tool with whānau, *marae* (formal gathering places),
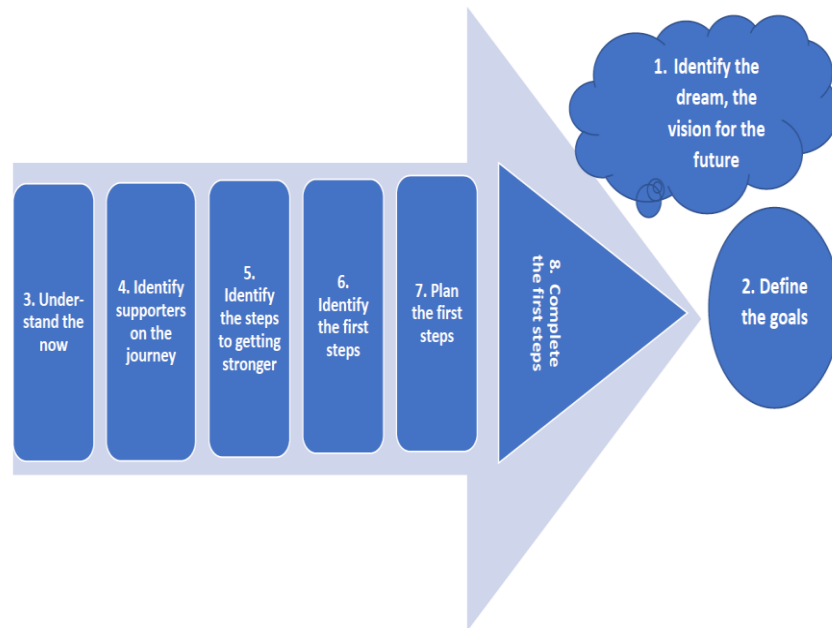
Figure 1: The first steps of PATH[1]

hapū, iwi, and as a consultation mechanism (Pipi, 2013). For this purpose, a simple PATH framework was adapted and is outlined below:

1. Identify the dream, the vision for the future.

2. Define the goals to achieve the dream.

3. Understand the current circumstances, the now.

4. Identify people who can help and support to achieve the goals.

5. Identify ways to become stronger.

6. Identify the first step.

7. Plan the first steps.

8. Complete the first steps (Pipi, 2010)

PATH and Whānau Ora

Whakauae initially adapted[2] PATH for use as a research tool during 2010 when carrying out Whānau Ora Action Research (Te Puni Kōkiri, 2015). At that time, Whakauae researchers were

prompted to look beyond traditional, Western research methods to ensure the effective capture of the depth of whānau outcome data. In addition, Te Puni Kōkiri (Ministry of Māori Development) required that Whānau Ora Action Research present whānau outcome data in novel and easily digested formats. A search for planning and outcome tools revealed the potential of PATH to meet these requirements of the action research.

Keen to understand the PATH process better, a Whakauae researcher herself used it for personal planning purposes. She could immediately appreciate the potential that existed for adapting the tool for use with participants in a research context. Further review of the tool, and of the associated literature, identified that while PATH was typically used for forecasting a journey and identifying end goals, it could also be used retrospectively to help whānau reflect and "make meaning of their experiences" (Baker et al., 2015, p.120). Subsequently, later in 2014, Whakauae created a PATH template, aligned to their

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[1] Adapted from *Planning positive possible futures, planning alternative tomorrows with hope (PATH)* (p. 16), by J. Pearpoint, J. O'Brien and M. Forest, 1991, Toronto, Canada: Inclusion Press. Copyrighted by Inclusion Press. Adaption approved.

[2] Adaption approved.

Whānau Ora action research interview guide, with a view to completing that template with participants during the whānau interview process (Te Puni Kōkiri, 2015). A visual representation of the whānau change journey was therefore created with whānau during interviews facilitating the additional collection of data and minimising the risk of data gaps. Data collected, and visually represented in a completed PATH diagram, was able to be reviewed and verified with whānau prior to interview completion. In this way, whānau were actively contributing to the research through reflection whilst being able to visualise

how they were working towards the transformation of their own social situations (Berg, 2001). A large colour copy of their completed PATH was given to whānau as *koha* (gift) for their participation in the action research, aligning with the Kaupapa Māori principle of reciprocity. Figure 2 below reproduces the Whakauae PATH tool template, adapted for use in our Whānau Ora action research (Te Puni Kōkiri, 2015) highlighting the addition of colour and text boxes aligned with the research questions.
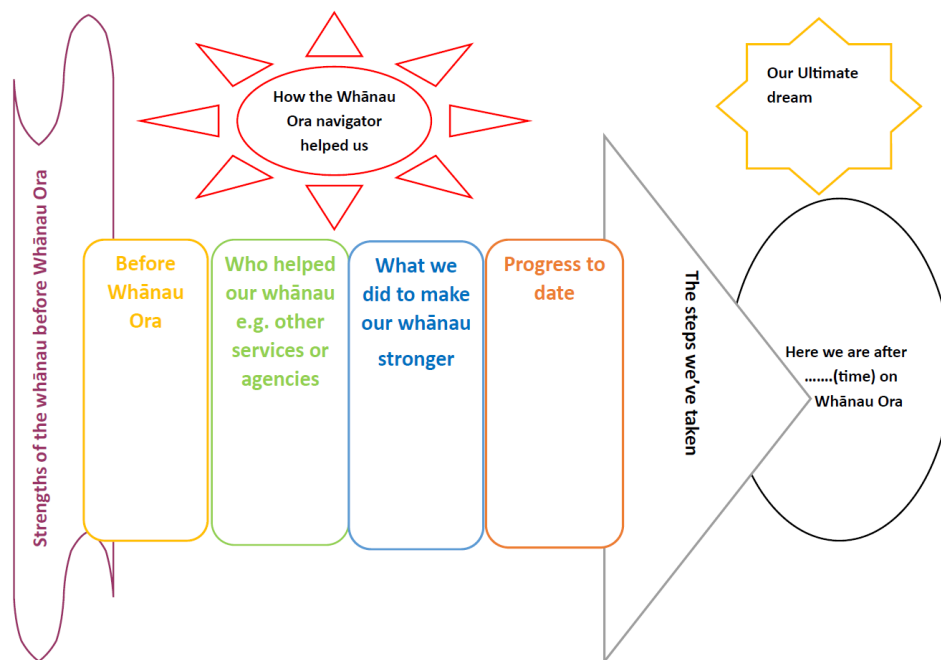

Figure 2: Whakauae adapted PATH template (Boulton et al., 2014)[1]

PATH and capturing outcomes

In 2016, the adapted PATH tool was again used in a Whakauae study. In this instance, the research included the effective capture of whānau experiences and outcomes in the Māori health service provider (MHSP) space with a particular focus on the prevention of chronic conditions[3]. In a way similar to that in which it had previously been used in our research, completion of the PATH template complemented the interview process; this time allowing the researcher to observe whilst MHSP *kaimahi* (community health workers) and whānau continued with business as

usual. A detailed description of how we applied the PATH method in this recent prevention of chronic conditions research is provided in the next section.

Application of the PATH method

Chronic conditions are a major cause of Māori health inequity; recent MHSP approaches are addressing broader determinants of these conditions within whānau-centred practice (Boulton, Tamehana, & Brannelly, 2013). In mid-2014, Whakauae was awarded funding by the Health Research Council of New Zealand (HRC)

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[3] Adaption approved.

to conduct a 42-month research project on three MHSP sites. In December 2014, the project was granted ethics approval[4] by the Central Health and Disability Committee. The aim of this research, *Preventing Chronic Conditions (PCC): Learnings from Participatory Research with Māori*, is to; examine how the prevention (primary and secondary) of chronic conditions is being modelled, practiced, and measured on three case study sites; define what short-term outcomes are being achieved, and ensure findings from case studies inform wider health service development. Using a three-phased approach, research site leads are working with MHSPs in Taranaki, Whanganui, and on the West Coast of the South Island.

All PCC research activity is being undertaken using a Kaupapa Māori approach; the research methods and practices employed take full cognisance of tikanga, Māori knowledge, and contemporary realities; the research incorporates Māori research aspirations, and is committed to building Māori capacity. In the first two phases of the study, Western methods including a literature review, organisational document review, face to face qualitative interviews, and fieldnotes were used to determine prevention "cases". Data analysis revealed that each case was unique and

that "one size fits all" research methods would not suit the diversity of whānau or provider practices represented in each of the cases under investigation. Subsequently, in Phase Three, the research site leads were asked to shape their data collection methods to both meet unique case needs and ensure the collection of rich data. Building on previous developmental work with the PATH research tool, the research team decided that further adaption was necessary. PATH template components were reconfigured, to better reflect the research questions posed by the PCC study[5]. In particular, we wanted a better understanding of the nature of whānau engagement with MHSPs, detailed service delivery descriptions, and specific whānau outcome data.

The revised PATH research tool (Figure 3) attempted to capture reasons for the whānau engaging with the MHSPs, the support networks used to assist whānau to reach their goals, the skills and knowledge used to make changes, the steps taken in the change journey, and the outcomes achieved. The PATH template drew on both Māori and English terminology so that it could be used by both *te reo Māori* (Māori language) speakers and English speakers.
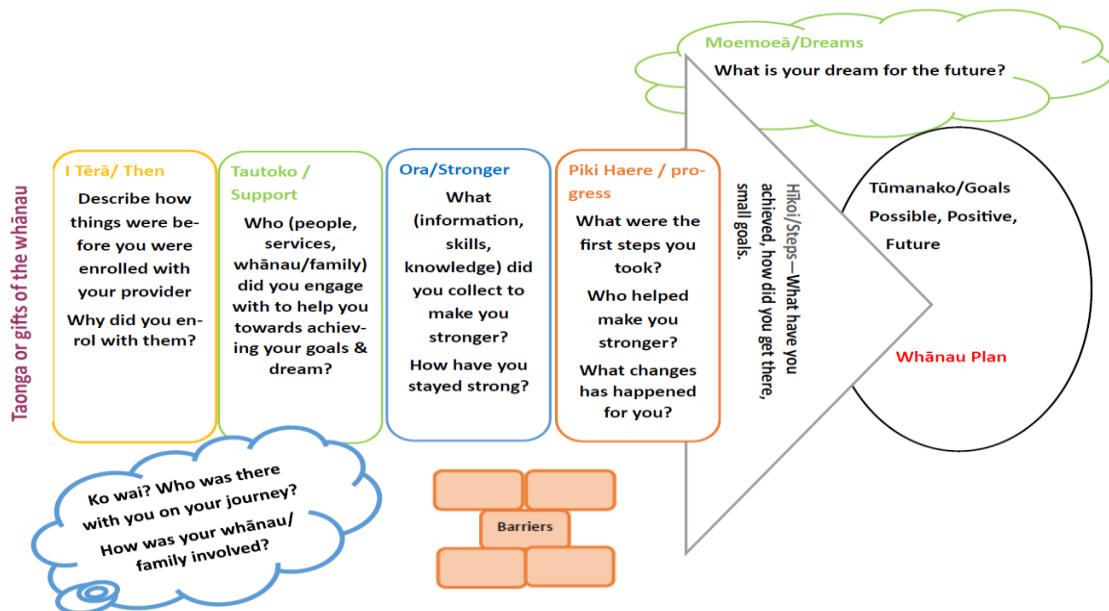

Figure 3: Case study two PATH template[1]

Using the PATH research tool.
The first step for the researchers was to meet with relevant MHSP service managers to discuss how best to use the PATH research tool with whānau service users. It was agreed that the kaimahi, because of their intimate knowledge of their whānau combined with their understanding of the community, would be the best people to identify and engage whānau to participate in the research project. Subsequently, the kaimahi were briefed by the service manager, which was followed by an email from the researcher outlining research requirements. Also included, was significant research documents such as the information sheet and consent form. Kaimahi were encouraged to contact the researchers directly if they had any queries or concerns about the research. Kaimahi then reviewed their caseloads identifying potential candidates to invite to participate in the research activity.

The criteria for inclusion in the research included that candidates were engaged in the service associated with the case under consideration. Candidates were contacted by the kaimahi and, if interested in taking part, were invited to bring other whānau members with them to an interview. The inclusion of wider whānau members was intended to enhance the researchers understanding of prevention from a whānau perspective. Participants did not take up the option to include their wider whānau however, and interviews were therefore conducted with individual participants in each instance.

Once participants signalled an interest in participating in the research, they were asked to read the information sheet and consent form, and encouraged to ask questions, so they fully understood the process. The kaimahi then negotiated time and place of an interview with them. The interviews were planned to occur alongside each participant's regular "catch up" session with their kaimahi. The advantages of this approach included that the researcher was simultaneously able to observe and populate the PATH tool, where relevant, from watching and listening to the interaction and *kōrero* (conversation) between the whānau participant and their kaimahi. The participant could relax and concentrate on "business as usual" rather than

focusing on the research component of the interaction.

Prior to each interview, the kaimahi and the site lead researcher met so they could travel together to the agreed interview venue. During the trip, the kaimahi provided the researcher with general whānau information such as whānau structure and the reason for engaging with the organisation. On arrival at the interview venue, the kaimahi took charge, making introductions and explaining the intersect between their regular catch up session and the research interview. That interaction provided an opportunity to reiterate the consent process and complete the consent form if that had not already occurred. At the same time, participants were introduced to the role that PATH would play during the interview and were given the PATH research template so that they could follow the interview steps.

The kaimahi and whānau participant then proceeded as normal, reviewing progress since their last meeting, discussing current circumstances and exploring what their next steps would be. During this interaction, the researcher remained silent, keenly listening and inserting words and basic visual images into the PATH template where she believed relevant. Following the participant – kaimahi catch up session, the roles reversed with the researcher taking the lead and the kaimahi becoming the observer, occasionally prompting further discussion and at other times reminding the whānau participant of relevant facts. At this point, the PATH tool functioned as an interview guide enabling the researcher to validate previously entered data and to probe for further information. At the end of the interview, the participant reviewed the completed PATH template with amendments and additions being made as required prior to confirmation of content.

On completion of the interview, the kaimahi provided the researcher with a copy of the whānau plan and goals. To ensure completeness of the data, the case notes (whānau plan and goals) were compared with data entered into the PATH during the interview with further PATH diagram refinements being made as necessary. In addition, the researcher later compiled fieldnotes
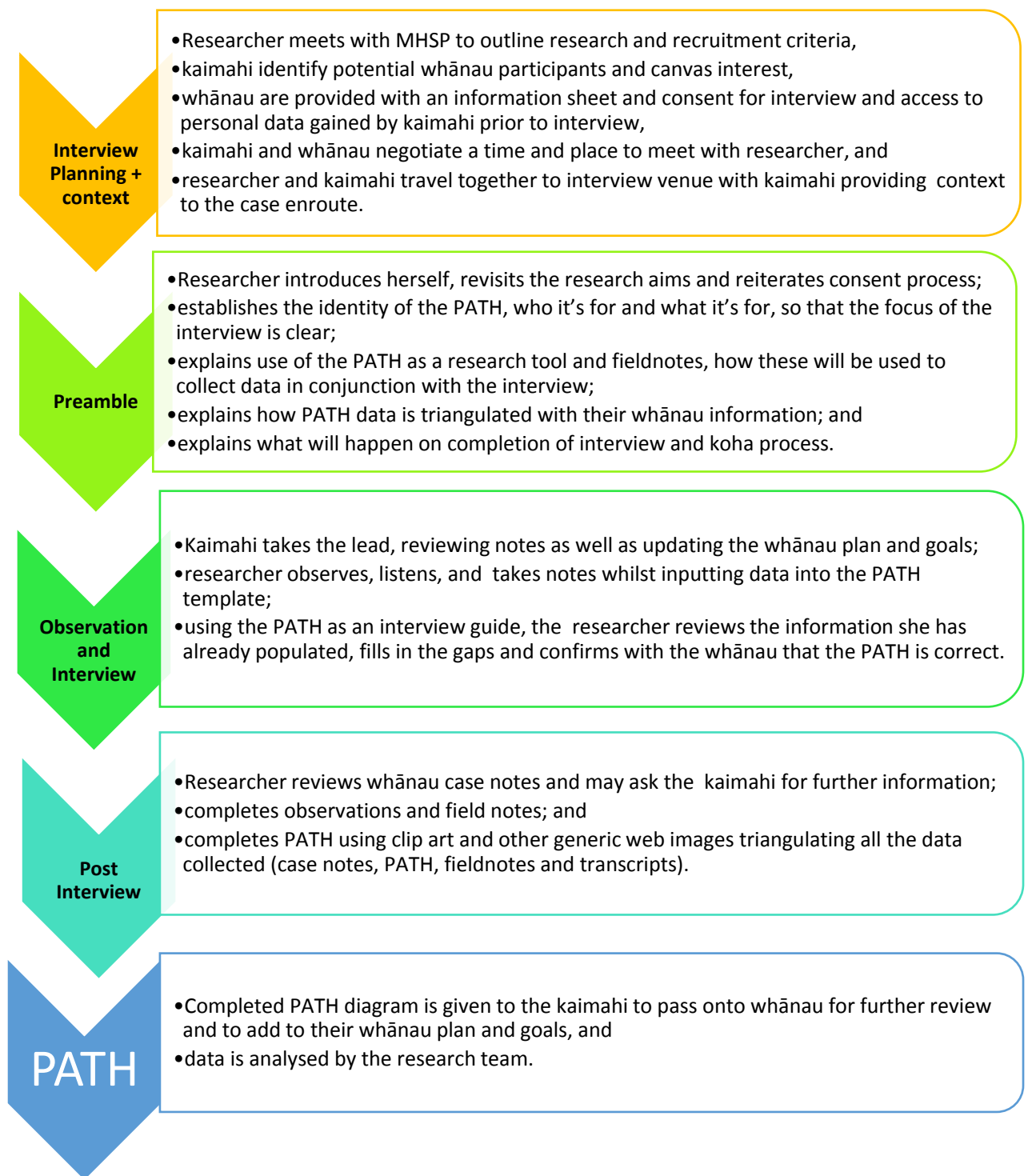
Interview Planning + context

- Researcher meets with MHSP to outline research and recruitment criteria,
- kaimahi identify potential whānau participants and canvas interest,
- whānau are provided with an information sheet and consent for interview and access to personal data gained by kaimahi prior to interview,
- kaimahi and whānau negotiate a time and place to meet with researcher, and
- researcher and kaimahi travel together to interview venue with kaimahi providing context to the case enroute.

Preamble

- Researcher introduces herself, revisits the research aims and reiterates consent process;
- establishes the identity of the PATH, who it's for and what it's for, so that the focus of the interview is clear;
- explains use of the PATH as a research tool and fieldnotes, how these will be used to collect data in conjunction with the interview;
- explains how PATH data is triangulated with their whānau information; and
- explains what will happen on completion of interview and koha process.

Observation and Interview

- Kaimahi takes the lead, reviewing notes as well as updating the whānau plan and goals;
- researcher observes, listens, and takes notes whilst inputting data into the PATH template;
- using the PATH as an interview guide, the researcher reviews the information she has already populated, fills in the gaps and confirms with the whānau that the PATH is correct.

Post Interview

- Researcher reviews whānau case notes and may ask the kaimahi for further information;
- completes observations and field notes; and
- completes PATH using clip art and other generic web images triangulating all the data collected (case notes, PATH, fieldnotes and transcripts).

PATH

- Completed PATH diagram is given to the kaimahi to pass onto whānau for further review and to add to their whānau plan and goals, and
- data is analysed by the research team.

Figure 4: Using the PATH Research Tool

using a PCC fieldnote template that prompted reflection on the data gathered during the interview. Reflection included researcher impressions of the interview overall, issues that may have impacted positively or negatively at the time of interview and potential data for follow up.

The final step in the compilation of the PATH was to add colour and graphics further honouring

the kōrero, the actions, and efforts of the participants. The completed PATH research diagram was then returned to the whānau participant, via their kaimahi, offering a further opportunity for them to review and make any additional changes. Figure 4[6] below provides an example of a completed PATH
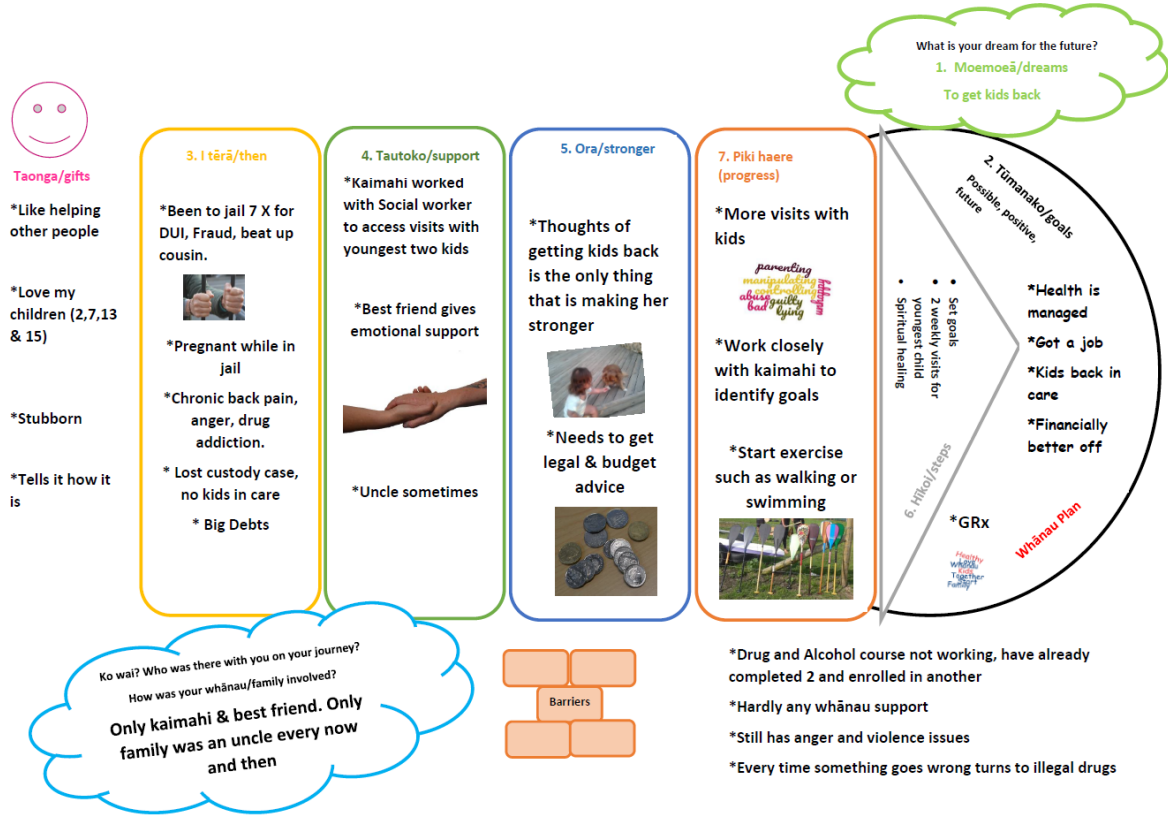

Figure 5: PATH example[1]

Discussion and Conclusion

As members of a well-recognised independent Kaupapa Māori research centre the authors, over the past fifteen years, have successfully used a broad range of what is considered Western research approaches to conduct qualitative research with Māori communities. These approaches include but are not limited to, the use of in-depth interviews, focus groups, documentary review, observations, and fieldnotes (Kvale, 1996; Patton, 2015; Tolich & Davidson 1999). What makes the use of Western approaches acceptable and successful for Māori as research participants is the application and adaptation of these methods by Māori researchers to accommodate a set of Māori values. Patton (2015) describes qualitative research methods as helping the researcher to understand participants personal experiences within a research context. This goal is no different for Kaupapa Māori researchers, however how we engage our participants, how we conduct ourselves within the community, and the understanding and interpretation we bring to the data is different from other more traditional qualitative researchers.

While some Māori researchers argue that Kaupapa Māori practice is critical and anti-colonial and should "challenge and disrupt the commonly accepted forms of research" (Mahuika, 2008, p. 4), other Māori researchers

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[6] These case studies have been anonymised and partially aggregated for the purposes of this discussion.

have found that by reframing some of these Western methods using a Kaupapa Māori approach they can be culturally adapted to align with Māori realities (Mark, 2016). By repurposing methods in this way, researchers have found ways to adapt tools that are empowering and transformative for Māori.

Two recent examples of adaptation of qualitative research approaches are provided by Lee (2009) and Mark (2016). Lee (2009) described a research approach, *Pūrākau* (storytelling), which enables Māori to tell stories in their own cultural framework; "pūrākau was reconceptualised as a culturally responsive construct for narrative inquiry into Māori teachers work" (Lee, 2009, p. 1). Mark (2016) goes on to use aspects of pūrākau in her own work but also extends and adapts another method, photovoice, to conduct Kaupapa Māori research combining the use of photo images, *whakataukī* (proverbs), and pūrākau to gather data on Māori experiences of healthcare. Using similar innovation, the authors of this article have adapted PATH as a data collection and reflection tool by combining an interview schedule with computer-generated visual imagery. The remaining discussion focuses in more detail on this adaptation.

Adaptation of PATH for Research Purposes
Early examination of the Phase One PCC data revealed a gap, in terms of depth and richness, in relation to the research questions posed. With this in mind, PATH was identified as a potential mechanism for adaption and employment as a data collection tool to enhance more traditional qualitative enquiry methods such as open-ended qualitative interviews (Leavy, 2017; Patton, 2015).

What we really wanted to hear were participants' stories, in their own words, in a way that would contribute significantly to the research. Using this narrative approach, which "honours people's stories as data that can stand alone as pure description of experience" (Patton, 2015, p. 128) we were able to combine narrative inquiry and the adapted PATH within a Kaupapa Māori context. Being responsive in the development of research methods is advocated by Patton (2015) who argues that "[t]he creative, practical, and adaptive qualitative inquirer draw[s]…on varied inquiry

traditions and use[s]…diverse techniques to fit the complexities of a fieldwork situation" (p.153).

For us, as Māori researchers, such pragmatism opens the door to creating and adapting tools that fit with Māori worldviews and are congruent with Kaupapa Māori research principles and ethics. The adaption of PATH as a research method was made easier as it fits well with Kaupapa Māori ethical research principles (Hudson et al., 2010). Māori ethical research principles such as *whakapapa* (relationships), *tika* (research design), *manaakitanga* (cultural and social responsibility) and *mana* (justice and equity) can be reflected in the use of the PATH research method. Whakapapa helps Māori to understand our place in *Te Ao Māori* (Māori world; Pihama, 2010). Thinking about whakapapa in the context of PATH, and the wider research process, it can be used to describe several key relationships including; those whānau have with others to achieve positive outcomes, the relationships between researcher and provider, and the relationship between researcher and kaimahi. The last two are facilitated through ongoing long-term research relationships and direct whakapapa of researchers to iwi within which the research is located. Whakapapa makes it easier to access potential participants, implement the research design, and share research findings collaboratively. The principle of tika takes cognisance of Māori realities and, together with our knowledge of our communities, our whānau and Kaupapa Māori methods we were able to adapt PATH creating a meaningful instrument for the benefit of the researchers and researched alike (Mark & Boulton, 2017). The principle of manaakitanga is illustrated in several ways including through PATH's strengths-based approach and ensuring the process of engagement is mana enhancing for participants. Our use of the PATH tool also embraced the principle of mana through its participatory nature as it encourages inclusiveness, acknowledging that the research process is controlled by the participant in what they chose to share. The final PATH created by the researcher, in collaboration with the participant, is given back to participants as a koha or gift. This reciprocation helps to facilitate the sharing of power and control between the researcher and the researched.

An advantage of using PATH as a research tool is that it builds on Māori oral and visual traditions as a means of recording and retaining information (Bishop, 1996; Koti, 2013; Lee, 2009). PATH creates the space for participants to tell their stories, simultaneously providing a framework for the interviewer to record their narrative using words and pictures. In this way, the use of visual imagery encourages ways of expression that are not limited to language (Eisner, 2008; Mark & Boulton, 2017). The method helps unlock minds allowing participants to better imagine a positive future for themselves and their whānau. Barker and Jane (2016) describe language as the tool of the privileged whereas, in contrast, PATH incorporates the universal medium of imagery and graphics (Prosser & Loxley, 2008). Bagnoli (2009) adds that there is the ability to ensure a greater sense of the 'story' through the use of diagrams, drawings, and relational maps.

Reflections on our use of the PATH tool

PATH adapted for use in our research has proven to be a flexible method that can be easily adapted to assist in answering a range of research questions in different research contexts. This flexibility allows the researcher to use PATH in a number of ways. Those ways include; working alongside the kaimahi as an interested observer, serving as a fieldnote template and operating as an interview guide, becoming a central data collection point and an integral source of data. Another advantage of using PATH is that we could validate the whānau story in discussion with the participant at the time of interview. The usual alternative, returning interview transcripts to participants for independent review, is time consuming and an added burden on participants. In our experience sending out transcripts for review rarely results in any participant feedback on the data.

On reflection, kaimahi were pivotal to the success of participant engagement with the PATH. They navigated through the intricacies of confidentiality and privacy, promoted the benefits of being involved in the research and, at times, helped participants to tell their stories. This last kaimahi role proved to be a bonus as, for a variety of reasons, some of the participants found it difficult to readily engage with the researcher.

One of the drawbacks when using PATH is that if it is used exclusively, without an audio-recording, accuracy of the data is reliant on the interviewer's retention and interpretation of information and the whānau participant's engagement in the research process post interview. Another disadvantage is the time it takes to complete the graphics component of the PATH diagram although, with practice, this becomes easier and quicker. We used MS Publisher and Word to format final PATH diagrams.

In our future use of PATH, we believe that it will be important to hand back the finished PATH diagrams to participants personally simultaneously seeking feedback about what worked well or not so well for them in the PATH research process. The interview activity itself however, was time consuming and arranging a follow up with participants via their kaimahi, when kaimahi were often already struggling to find the time and other resources to service their caseload, felt unwarranted.

We have argued that innovative research methods that fit with Kaupapa Māori approaches are important when researching with Māori. PATH, one such method, has been adapted by incorporating the oral and visual storytelling culture of Māori with traditional Western research approaches such as fieldnotes, observations and review of documentary evidence through case notes. Using PATH in this way allows the participant to tell their story by grounding it in the now, reflecting on the past and focussing on the future. Using PATH, we added depth to the analysis and contributed to answering the research questions.

In summary, we conclude that the PATH tool can be adapted satisfactorily to enable incorporation in Kaupapa Māori research and is a useful addition to the researchers' toolbox as a method for gathering qualitative data.

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