

Participative action research: Consensus cardsort – Whānau future narrative

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Abstract: 'Consensus Cardsort Future Narrative' is an appropriate developmental process for whānau Māori who are seeking to realise their potential, change life circumstances, and achieve a better quality of life within the context of whānau ora. This Participative Action Research approach is based on Kaupapa Māori Theory, holding that Māori are multi-dimensional, aspirational, and holding distinctive culture and values.

Consensus Cardsort is easy to use. Essentially, participants are asked a 'what' or 'how' question and are asked to write one response or idea on a card. The individual participant can make as many responses as they like. The cards are then collected, shuffled, and re-distributed amongst the participants. They discuss what is written, cluster like responses, and summarise the clusters. The summaries provide the 'bones' of a narrative'. Where the process is used to produce a "Future Narrative" it can have a potentially transformational impact for the participant whānau. A further stream of value is added by applying the Consensus Cardsort process as a Participative Action Research method within an organisational system such as a hapu or an iwi.

The process of creating 'Whānau Future Narrative' through Consensus Cardsort develops aspirations that emerge from self-analysis rather than from a 'you should' injunction, or from a determination by others. The Consensus Cardsort Future Narrative process invests authority and responsibility within the Māori whānau and stimulates the power to act and seek optimal sustainable success. Through their Future Narrative the whānau stipulate their action agenda. When the process is undertaken as a collective of whānau it can be used to initiate marae and hapu action plans. By enabling Tikanga Māori based concepts, the Consensus Cardsort Whānau Future Narrative process provides cultural locus and is 'acculturating'. In promoting Māori achievement, the process encourages Māori to express tino rangātiratanga by drawing on and utilising their 'Mana ake', their unique contribution to Aotearoa/New Zealand.

Keywords: future narrative; Kaupapa Māori research; Kaupapa Māori theory; Participative Action Research (PAR); transdisciplinarity; whānau ora

Introduction

The development of the Consensus Cardsort Whānau Future Narrative Participative Action Research Process arose from the frustration of field practitioners with the demand by Government agencies to provide 'evidence based research' to justify support for funding projects and services among hard-to-reach and difficult-to-deal-with whānau. Little such research exists. These populations, in Aotearoa often Māori, provide access difficulties for mainstream researchers (Bishop, 1994; Spoonley, 1988). Community members often balk at the proposition of being 'researched' and refuse to participate. On the other hand they want to enjoy whānau ora and are keen for their voices to be heard so they are able to contribute to the development of policies that affected them and their families. It was decided to develop a process that assumed potentiality, was flax roots up, and was positioned as research 'with' rather than research 'on'.

As a social construct in its own right, whānau has been described as one way of giving voice to the different sections of Māori community and, also, as an organisational structure in which

research can take place (Durie, 2005a; Smith, 1999). Mason Durie describes whānau as an intersection where research meets Māori and where both recruitment into, and the ownership of, research is encouraged (Durie, 2005a).

Russell Bishop advances whakawhānaungatanga itself as a research strategy in its own right. He proposes an 'Experiential Kaupapa Māori Research Matrix'; the elements of which are described as:

1. Being a participant with an agreed-to agenda
2. Being a participant within the projects being considered in the narratives
3. From talking with other research participants in the form of interviews as chat
4. From constructing joint narratives about events with other researchers (Bishop 1996, p. 213)

The Consensus Cardsort Future Narrative process sits within this notional 'experiential' matrix, and when applied in a whānau-based approach enables the reciprocity implicit in whakawhānaungatanga. The result is what has been described as 'reciprocal investment'. The investment is into the whānau, and thus, through whānaungatanga, into the hapū and the iwi. In this context the whānau can be considered to be in itself an institution.

That implicit reciprocity provides the 'agreed-to agenda'. Reciprocal 'community action' projects flow from the agenda. Elbow (1986) identifies different forms of reciprocity, one of which is described as 'connected knowing', where the knower is linked to the known and shares a common understanding and common basis for this understanding. We may recognise this as the implicit knowing enjoyed and shared by whānau members (Durie, 1994, 2001). The focus of whānaungatanga is on realising the potential of the group rather than of the self and this gives rise to what becomes a shared and reciprocal voice.

Kaupapa Māori analysis

There is an emergent epistemology called Kaupapa Māori Theory (Barclay, 2005; Cram & Hazel, 2004; Edwards, 2000). Kaupapa Māori Theory is:

1. Related to being Māori (Barlow, 1991; King, 1992; Massey University, 1995; Mead, 2003; Royal, 2002);
2. Connected to Māori philosophy and principles;
3. Assumes the validity and legitimacy of Māori epistemologies;
4. Values the Māori language and culture; and,
5. Concerned with the struggle for Māori autonomy (Bartley & Spooner, 2005; Connor, 2006).

Bishop describes Kaupapa Māori Theory as being an expression of upraised consciousness and a resistance to the dominant discourse (Bishop, 1996). At its core, Kaupapa Māori Theory is the philosophy and practice of being and acting Māori, and wherein things Māori are accepted in their own right. Kaupapa Māori Theory is a Māori theoretical perspective which validates and privileges Māori knowledge in pursuit of Māori succeeding as Māori (Durie, 2005b). Consequent upon Kaupapa Māori Theory a Māori research philosophy has emerged – Kaupapa Māori Research (Edwards, 2000). Kaupapa Māori Theory and Kaupapa Māori Research act as a theory of transformative praxis (Smith, 1999).

Kaupapa Māori Research is a Māori approach to Māori research (Smith, 1996). According to Cram and colleagues, all parts of Kaupapa Māori Research come from a Māori perspective and are based on an emancipating theory that is largely directed towards overcoming oppression (Cram & Hazel, 2004). This is a neat fit with Participative Action Research and the epistemological approach of Consensus Cardsort Whānau Future Narrative which is based on Critical Theory (Calhoun, 1995; Habermas, 1981) and Transdisciplinarity (Bridgman &

Brooker, 2003). The methodology is Participative Action Research (PAR) (Wadsworth, 1998) framed as Kaupapa Māori Research (Bishop, 1996; Cram, 1997, 2001). PAR arises from 'Action Research' which itself consists of a family of research methodologies which pursue action and research outcomes at the same time. PAR therefore has some components which resemble consultancy or change agency, and some which resemble field research. It is emergent and takes place gradually as the process is worked through (Dick, 1999). The PAR process is reflective and uses a number of techniques to enable self-critique and reflection (Schon, 1983, 1987; White 1995). Accordingly, although positioned as PAR, the Consensus Cardsort process is consistent with Kemmis and McTaggart's (1988) Framework for Action Research.

PAR works on the premise that knowledge is political and acts on the world. It is rooted in the liberation of disadvantaged and oppressed people through participation, discourse, reflection and action (Munford & Sanders, 2003). PAR came about as a direct resistance to conventional research methods and is perceived by some as an act of opposition against the effects of colonisation and institutionalism (Denzin & Lincoln, 2000). In Consensus Cardsort the participants are contributors to the project, 'consultants', and are owners of the information, the vision and the action programme. The action programme emerges from self-analysis, not from a description or a determination by others (Fook, 1996; Kellehear, 1993; Kemmis & Mc Taggart, 2000). In is at this juncture, in the expression of self determination or tino rangātiratanga, that the process is fundamentally political. The compatibility of the process with Māori cosmology (Stewart-Harawira, 2005) and the application of tikanga Māori during the process stimulate reflective kōrero. The process of creating a 'Whānau Future Narrative' through Consensus Cardsort develops aspirations that emerge from self-analysis rather than from a 'you should' injunction, or from a determination by others.

Cardsorts are designed with the assumption that the answers to the client's problems already lie within the person and by a sorting, sifting and selection process they learn how they can resolve issues. The client is in charge of sorting of the data. The responsibility for outcomes, therefore, effectively passes from the skilled helper to the client, where it properly resides. (Stevens, 2006, p. 1)

In that respect this approach is client centred. Client, in the context of this study, is the Māori whānau, and, thence through whānaungatanga and the Māori social structure, hapū and iwi. Cardsorts (Fisher, 2003) have been seen to be helpful with ethnic, minority groups and indigenous groups (Kaliq & Gross, 2003).

Cardsorts are especially helpful with ethnic and minority groups. In today's increasingly multi-cultural world where the norming of standardised psychometric instruments beyond Anglo-Saxon western culture lags behind, Cardsorts offer another distinct advantage. Interpretations are not dependent on predetermined norms...' (Stevens, 2006, p. 2)

The Consensus Cardsort Future Narrative process aims to invest authority and responsibility within the Māori whānau and stimulates the power to act and seek optimal sustainable success. Through their Future Narrative the whānau can stipulate their action agenda. By enabling tikanga Māori based concepts, the Consensus Cardsort Whānau Future Narrative process provides cultural locus and is 'acculturating'. In promoting Māori achievement, the process encourages Māori to express tino rangātiratanga by drawing on and utilising their mana ake, their unique contribution to Aotearoa/New Zealand.

Application

As a general process Consensus Cardsort (Wilson, 2005) has been around for a long time. In the writer's experience it was first utilised by the late Dr Clayton Lafferty, the industrial

psychologist who developed Human Synergistics. The writer first encountered Cardsort as part of a 1990's Commission Project called 'Going for Goals' (Napier City Council, 1990). The facilitator for the Going for Goals process was Shaun McCarthy of New Zealand Human Synergistics Ltd. Shaun McCarthy trained and licensed the writer as a trainer in Consensus Cardsort and use of New Zealand Human Synergistics Ltd proprietary materials. The process was open to the community at large. Participants were asked to respond to the question *What can this community do to develop employment?* Participants had been issued with blank cards and were asked to write their responses, one card per idea. The cards were then clustered and summarised on flip chart sheets (an alternative to what are called summary cards in later research projects). A consensus of issues and beliefs began to emerge and it became apparent that an implicit 'future narrative' could be constructed by assembling the 'bullet point' summaries.

In 2001 the writer was contracted to facilitate the programme of public consultation for the Royal Commission on Genetic Modification (Ministry for the Environment, 2001). Consensus Cardsort was used as a method to facilitate a scoping meeting and was then used at 14 public consultation meetings held across New Zealand, involving 1255 or more individuals. Again it proved to be an effective device for assembling points of consensus even around a highly contentious topic. The writer has more or less adopted the process developed for the Royal Commission as the general template. It is recorded in detail in the *Report of the Royal Commission on Genetic Modification* (Ministry for the Environment, 2001 Appendix 1 Section 3, pp. 111–113).

Consensus Cardsort was also utilised for the *Methamphetamine Community Resilience and Self-Prohibition Scoping Study* undertaken across the North Island of New Zealand in early 2003 for the Ministry of Health (O'Reilly, 2003). Nine consultations were undertaken in a group setting. The process led to some significant insights about how to counter the gathering wave of methamphetamine use in New Zealand by building community resilience. The process illustrated communities at work analysing their own situations; defining their own problems and challenges; setting their own aims and goals; and, devising their own solutions and strategies (Himona, 1998, p. 1).

The Consensus Cardsort method was applied in a hapū development exercise undertaken for the Runanga Marae (Ngāti Mahuika) in mid-February 2004 (O'Reilly, 2004). Forty adult hapū members successfully utilised Consensus Cardsort methodology to group and summarise their ideas about what they wanted for their marae. Children contributed drawings.

In 2005, another study using the Consensus Cardsort process was undertaken by a young Māori medical student, now Dr Monique McKenzie, a GP at Newtown Union Health. It sought to determine the health concerns of Ngā Mokai, a cluster of hard-to-reach and hard-to-deal-with Māori whānau in the central and southern suburbs of Wellington. It was found to be a method which validated participants' opinions and ideas through knowledge sharing process which identified common issues experienced by the group (McKenzie, 2005).

In 2007 the Roopu Māori of Health and Disability Advocacy Services – Advocacy Network Services (ANS) is the regional field service of the Office of the Health Commissioner – wanted to develop a process to canvass Māori service providers and Māori service consumers. ANS convened hui in Te Wairoa, Ruatoria, and Te Teko. In all, besides the ANS team, 68 people participated. This included a large number of tangata whaiora (mental health service consumers) who managed to participate in the process well. The process produced useful results by way of feedback to ANS service delivery strategists and created a sense among participants that they had been listened to.

Research with whānau

It was considered that Consensus Cardsort had potential to not only assemble and record whānau aspirations for purposes of policy development but also to present them in a way that gave the whānau its own future narrative. The method was initially trialled as part of a comprehensive enquiry *Whānau Development Action Research Programme* (2004–2006) undertaken by Te Puni Kōkiri. This aspect of the overall project was called *Mahi Whānau* (O'Reilly, 2006) and canvassed the aspirations of three diverse whānau Māori. The general principles of autonomy, beneficence, non-maleficence and justice were applied to the study design (Rowan, 2000). A Māori expression of ethics was assumed as being mandatory. The following principles were utilised (Smith, 1999):

1. Aroha ki e tangata (respect for the people)
2. Ka nohi ki tea (present yourself face-to-face)
3. Titiro, whakarongo, kōrero (look, listen, speak),
4. Manaaki ki te tangata (share and host people be generous),
5. Kia tupato (be cautious)
6. Kaua e taka hia te mana o te tangata (do not trample over the mana of the people)
7. Kaua e mahaki (don't flaunt your knowledge)

In brief, all whānau produced compelling future narratives, each expressing diverse and distinct goals, measures of what whānau ora meant for them. The overall project is comprehensively recorded in *Mahi Whānau* (O'Reilly, 2006). Te Puni Kōkiri analysts concluded that the method suited the needs and realities of whānau Māori (Te Puni Kōkiri, personal communication, 2006).

In 2007 a second iteration of the process *Mahi Whānau (2)* was undertaken and is recorded as the writer's dissertation for a Masters Degree in Social Practice (O'Reilly, 2008). Whilst each project was a stand-alone piece of work, the two projects were entwined, the latter effort building on the understanding gained in the first. This is consistent with the principles of PAR and can be graphically represented as sequences in a cycle of spirals demonstrating the growing engagement with knowledge holders and the increasing understanding of issues as the research rolled forward (Carr & Kemmis, 1986).

At this point it is appropriate to describe the process step by step. Various adaptations can be made for differing circumstances and needs, but the following will give the reader a good idea of the core process. The *Mahi Whānau (2)* process commenced with a hui held at each whānau home in turn. After the ritual of welcome, mihi mihi and karakia, the researcher gave a brief explanation as to purpose of the project. Each whānau was asked the same three questions, and was presented with one Likert style questionnaire (Likert, 1932) which sought to discover how comfortable the whānau was with Consensus Cardsort as a process.

Questions:

1. What has your whānau done to achieve your whānau future vision?
2. In what ways did the Cardsort process help your whānau produce a future vision?
3. What would have helped your whānau improve your achievement in terms of your whānau future vision?

Each Cardsort took up to two hours. The participant whānau were provided with:

- A poster with instructions
- A set of detailed 'facilitators' instructions and explanations on an A4 sheet
- A bullet point summary of the process on another A4 sheet

Table 1. Consensus Card Sort Future Narrative instruction chart

- Write your idea or comment on a white ‘idea card’
- Write one idea per card. If you have more than one idea use another idea card
- Write so someone else can read your writing
- If you would rather draw a picture or diagram then that’s ok as well
- When you have finished writing all your ideas gather all the idea cards together and shuffle them.
- Distribute the white idea cards equally amongst the group
- Cluster similar white idea cards
- Summarise the cluster of ideas on a coloured summary card
- Put the coloured summary card on top of the relevant pile of idea cards and bind them with a rubber band.
- Repeat the process until all idea cards have been clustered and summarised.

Each whānau was presented with copies of their own Whānau Narrative, created by them and written up in *Mahi Whānau*. The whānau worked with the researcher to construct on a flip chart their own bullet point summary of their recorded aspirations as at June 2006. The whānau were then presented with the first of three questions written on an easy to read card placed on the table. The first question was:

What has your whānau done to achieve your whānau future vision?

Whānau members were issued with ballpoint pens and white ‘Idea’ Cards, about envelope size, and they were asked to record their responses to the questions on their Idea Cards. At this point the whānau members were asked to run the Consensus Cardsort by themselves. In each instance the whānau had the process under control within a few minutes. When all of the Idea Cards in response to the first Cardsort question had been clustered, and the Summary Cards had been agreed upon, the participants were asked to respond to Likert-style self-assessment question sheet in response to the following statement:

Our whānau knows how to use Cardsort to spell out our whānau’s desired future.

Each whānau knew what to do.

Next they used Consensus Cardsort to answer the following two questions:

In what ways did the Cardsort process help your whānau produce a future vision?

What would have helped your whānau improve your achievement in terms of your whānau future vision?

The results and a comprehensive analysis are recorded in *Mahi Whānau (2)* (O’Reilly, 2008) but, again, in summary the participant whānau found the Consensus Cardsort Future Narrative action research process to have been a very empowering activity which helped each whānau gain clarity of purpose and helped accelerate achievement. The Consensus Cardsort Future Narrative process has had an evident impact on each participant whānau in the *Mahi Whānau* studies and this impact is potentially transformational.

It was also apparent that the process was easy to learn and transfer. It is a tool or soft technology which helps fill what Cram spied as a capability gap in identifying the need to grow a ‘by Māori for Māori’ research capacity for Māori researchers and Māori contexts (Cram, 1997).

The results of the seminal *Mahi Whānau* research project indicated that Consensus Cardsort process works well for Māori. The workshop groups in *Mahi Whānau* advanced a number of insights as to why this is so. Amongst them are that Consensus Cardsort enables the natural Māori process of *kōrero* to take place. It is a non hierarchical process and whānau friendly in that it allows people to contribute without regard to their age or status. Even where there are difficult situations it reduces or eliminates the likelihood of personality confrontation because it separates the idea from the person. Consensus Cardsort is an inclusive process that allows collective and reciprocal thinking. It promotes synergy drawing the best from the whānau. The Summary Cards help ideas to ascend to the next level. Even if they are not widely supported the ideas do not get knocked out. They sit there and so the process does not trample on one's mana by having them 'rejected' or 'defeated'. Consensus Cardsort allows a variety of ways to make input.

Consensus Cardsort Whānau Future Narrative has continued to be trialled in the field by the Consultancy Advocacy and Research Trust (CART) Wellington. CART used Consensus Cardsort to help 90 members of Mongrel Mob Notorious whānau in their quest for whānau ora. This project engaged participants at three hui (Tokaanu, Putaruru, Putaki) and asked the question

What do you want for your whānau in 5 years time as regards housing, employment, health, recreation and cultural identity?

The process proved to be extremely powerful and produced an uplifting narrative as to the roopu's collective aspirations. A further trial has picked up on Dr Monique McKenzie's pilot study amongst a cluster of 50 'Ngā Mokai' whānau in southeast Wellington. Again the questions asked of whānau members have focused on the future aspirations of the whānau five years on. The resulting narrative has been used to help each whānau create a whānau action plan.

The Consensus Cardsort PAR method was also utilised in a research programme commissioned by Te Mangai Paho investigating causal links between Māori Language Broadcasting and the practice of Māori speaking te reo Māori (O'Reilly, 2009). Over 130 participants in total took part in a series of five hui.

Finally, in terms of the legitimising literature the Consensus Cardsort Future Narrative process sits easily with a broad sweep of community development models (Himona, 1998; Chile, 2006; Community Care Needs Assessment, 2000; ESR, 2007) and is highly compatible with Chile's three streams of 'tikanga' in community development by providing a point of confluence for a public sector programme, community based action, and Māori self determination (Chile, 2006).

Summary and discussion

Consensus Cardsort Whānau Future Narrative is an appropriate developmental process with whānau Māori who are seeking to realise their potential, change life circumstances, and achieve a better quality of life. *Mahi Whānau [2]* (O'Reilly, 2008) establishes an academic underpinning of the Consensus Cardsort Whānau Future Narrative process. It canvasses the nature of Māori community development, the emergent epistemology of transdisciplinarity, and the nature of futurority and the expectation of a better future from a Māori perspective. As a research approach, Consensus Cardsort helps to elicit what Gibbons describes as socially robust knowledge (Gibbons, 2001). The process also enables Mode 2 type transdisciplinary thinking by being 'bottom up' and engaging knowledge holders not normally consulted in the development of policy. It is demonstrably transcultural, and able to deal both with qualitative and quantitative approaches (Bridgman & Brooker, 2003; Goven, Cram & Gilbert, 2004). The

process' transcultural characteristics make it a suitable for Kaupapa Māori Research. Consensus Cardsort Whānau Future Narrative has much to recommend it as a process for use amongst New Zealanders in general and Māori New Zealanders in particular. It has seeded hope and facilitated change amongst participant whānau. As the process expects action as well as reflection, if widely applied, it could be a catalytic device to enliven a broad movement towards whānau ora.

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