

# The PATH Planning Tool and its Potential for Whānau Research

Kataraina Pipi

**Abstract:** PATH is an acronym for Planning Alternative Tomorrows with Hope. The PATH planning tool research method can be used in a range of contexts, and within whānau it can be used to assist in individual and whānau planning. A unique aspect of this tool is the visual images that are created alongside a facilitation process that seeks to clarify, research and create a positive and hopeful ‘pull toward an aspirational place’. This paper aims to outline the potential of the PATH as a data-gathering tool that promotes storytelling and critical analysis as well as active engagement from stakeholders. This should be of interest to Government agencies as a means of identifying whānau-related policy and can inform whānau and communities about ways to have their dreams and plans captured in a creative way.

**Keywords:** data-gathering tool; facilitation; person-centred planning; planning tool; strategic planning; whānau collectives research

## Introduction

This paper outlines use of the PATH in Māori communities in Aotearoa New Zealand by Kataraina Pipi over the past eight years, including an examination of:

- The foundations and principles upon which the PATH is based
- The structured and systematic process used
- The practical use of the PATH in various settings in Aotearoa
- The PATH method’s use and/or potential use in research with whānau
- Feedback about the method

The PATH planning tool helps individuals, groups, businesses and whānau reflect upon where they are in terms of their current goals and dreams, their uniqueness, attributes and strengths, and their aspirations for the future. It is a tool that is most helpful when people are stuck or in need of an alternative way of viewing what it is that they want to achieve, through pictures or graphics as opposed to words. The PATH’s use of symbols and colour to portray hopes and dreams is a powerful medium, particularly for Māori as it provides a picture that can serve as a visual and emotional anchor and evoke positive memories. The ‘hope’ factor suggests that in order for the plan to be realised, the process of PATH planning needs to generate hope so that there is a ‘pull’ toward the dream and a level of motivation to inspire the actioning of the plan.

The originators of PATH were Marsha Forest, Jack Pearpoint and John O’Brien, all of who had been involved in the disabilities sector for over 30 years. They have collectively made a significant contribution to understanding and applying person-centred planning approaches. PATH encourages positive change. There are two key aspects that differentiate the PATH from other planning tools – self-efficacy and creativity. Self-efficacy, as defined by psychologist, Albert Bandura (1994), is the belief that one has the capacity to organise and carry out the actions necessary to produce a desired effect and that this is central to success (O’Brien, 2010). Self-efficacy promotes certainty that it is possible to take real steps towards

meaningful goals, particularly when there is support to do so. The creativity aspect of the PATH is evident in the multi-coloured diagram that results from the process.

### ***The origins of PATH use in Māori communities***

Kataraina first saw the PATH in 2002 on a visit to Ma Mawi Chi Itata, an indigenous social services provider based in Winnipeg, Canada. They were using the PATH for business, project and strategic planning. Kataraina saw the potential of the PATH as a tool that could be used in a range of ways with iwi and Māori communities and so she sought permission from the developers to explore and use the PATH in Aotearoa. Since returning from Winnipeg, Kataraina has adapted and utilised the PATH in many Māori contexts including:

- Personal planning
- Whānau planning
- Organisational planning
- As a research and evaluation tool
- As a framework for thinking about measuring success within Māori communities

### ***Person-centered planning as the foundation***

The PATH followed on from a previous tool developed called MAPS (Making Action Plans); both are tools for person-centered planning. Person-Centred Planning (PCP) is a concept that was developed in the late 1980s, and describes a concept developed from the work of O'Brien and Mount from the United States and Forest, Snow and Pearpoint from Toronto, Canada. It is designed to assist individuals with disabilities to achieve their dreams and aspirations (NYS Office of Mental Retardation and Developmental Disabilities, 2010). It has a focus on building capacity and building on strengths rather than a deficit focus whereby problems and issues are the primary focus. PCP involves a team of people made up of those who have an interest in a successful outcome for the individual coming together to collaborate in a series of activities that focus on developing a common understanding of a person's past, current situation and goals for the future. These activities are frequently guided by a skilled facilitator of the process who uses graphic recordings (words and pictures on large sheets of paper).

All PCP approaches share three basic features:

- (1) Everyday events and activities in which the individual participates should be the focus of planning.
- (2) Family and connections within the community are more important than the services currently available.
- (3) Planning must be done with the individual with the disability and a group of people who know the individual well and are committed to helping the individual achieve their goals (Falvey, Forest, Pearpoint & Rosenberg, 1994).

### ***Inclusion and diversity are underlying principles***

PATH and MAPS have their roots in the work toward inclusion that people with disabilities and their families have been doing in schools, workplaces, neighbourhoods and community associations since the early 1950s (O'Brien, Pearpoint & Kahn, 2010). PCP is a term used to describe supporting people with disabilities and families working for inclusion to plan for their futures ensuring that the person(s) most affected by the plan are at the centre of the plans. The approach offers individually tailored support to individuals and groups through a facilitated process.

The founders of MAPS and PATH were trying to provide a way in which individuals, groups and communities could look back, acknowledge and learn from their past experiences and

move forward into the future with hope for realising their potential and place in their community.

Another important principle that guides PATH facilitation is diversity whereby the facilitator encourages and welcomes different perspectives, approaches and viewpoints, and often in whānau and community settings there can be many differing perspectives, alongside the vast array of dynamics and complex relationships.

The next section outlines the step-by-step application of the PATH and outlines a range of contexts in which the PATH has been used in Aotearoa.

## **Application**

### ***A structured and systematic process***

The PATH utilises a structured planning process whereby each step is worked through in a systematic way. It uses the notion of the ‘begin with the end in mind’ principle and starts by creating the dream or ideal picture, and then moves to imagining the achievement of some specific things by a certain timeframe. The values that will guide the journey are captured in order to qualify the purpose of each aspiration.

The next step is a snapshot of the current situation compared with the ideal, giving a sense of a ‘reality check’ of where the whānau are ‘now’ in relation to where they want to be in the future. The notion that others may want to be enrolled in the vision and assist along the way is next whereby the whānau considers who else they might get on board to support their PATH and what specific contribution they may want from them.

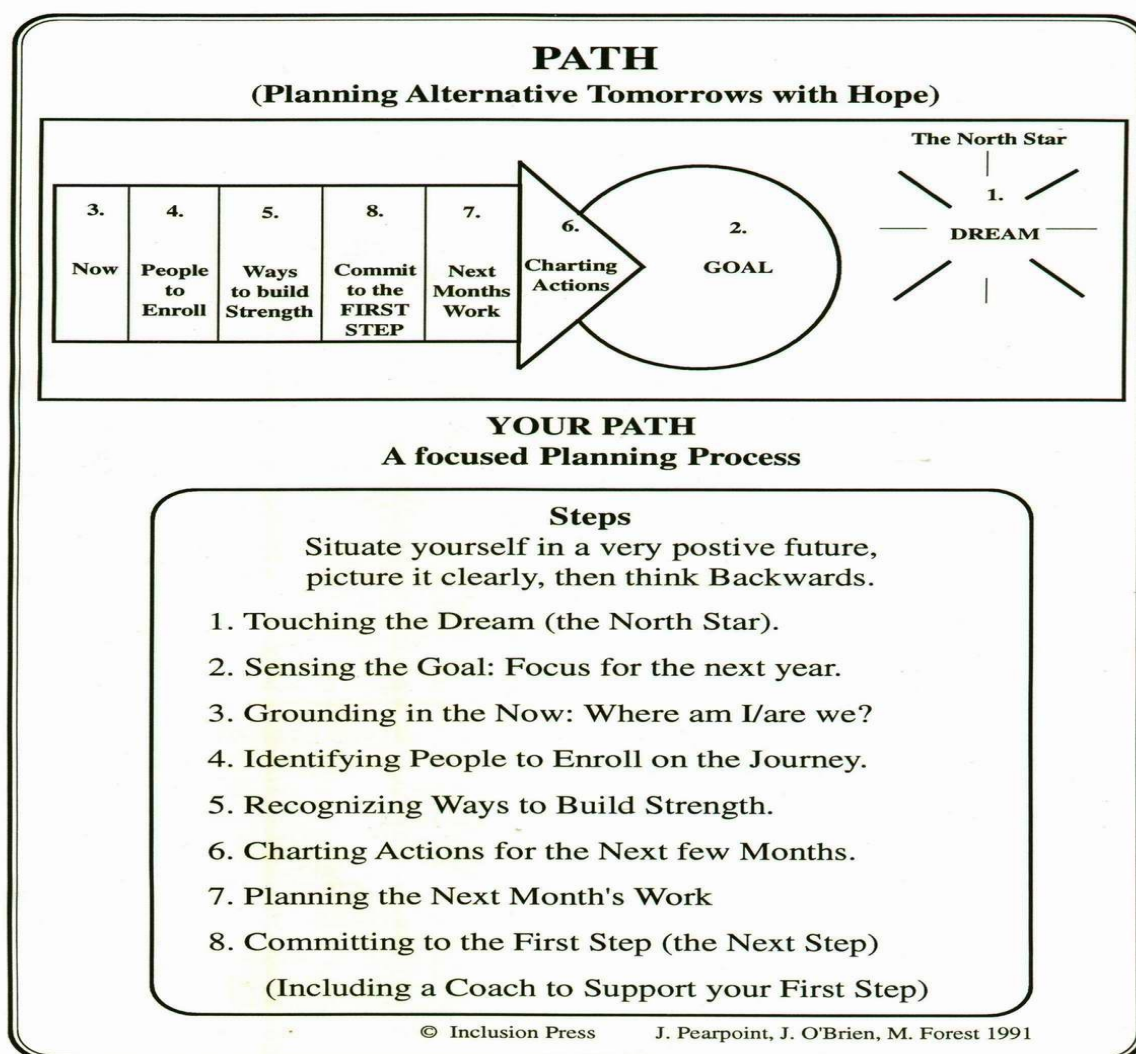
The next step is likened to a strengths, weaknesses, opportunities and threats (SWOT) analysis whereby the participants take stock of three aspects – skills, knowledge and relationships – and consider in each aspect what specifically they need to strengthen in order to achieve their outcomes. The blocks and barriers that might prevent the realisation of dreams is the next step. Participants are asked what are all the things that might prevent them from achieving each of their objectives and then an exercise is shared with them to help them look at ways of minimising the blocks and understanding the nature of ‘personal and collective responsibility’.

Finally, an action plan is determined whereby specific milestones to be achieved by set dates are considered. The first step in each of the milestones is clarified and individuals are delegated responsibility for that step.

When Kataraina first discovered the PATH it was primarily used as a planning tool. However, the tool has since been used in a range of contexts including as a:

- Planning tool (for individuals, whānau and organisations)
- Alcohol and drug assessment tool
- Consultation tool – undertaking consultation exercises with communities
- Koha (a gift) to iwi and Māori providers – Māori Provider Success Research Project
- Strategic planning tool with tourism organisations, and assisting communities, for example, in the retention of Māori language
- Personal development tool

Figure 1 outlines the steps involved in completing a PATH.



**Figure 1. Template of the steps in the PATH**

Reproduced, with permission, from Pearpoint, O'Brien & Forest, 1991, p. 16.

The following are case examples of how the PATH has been used in a range of situations:

**Planning tool**

**Individual PATHs** have had a range of foci including exploring an individual's life purpose, reflecting on their current situation, planning for the realisation of specific dreams and aspirations. One example was a PATH done with a grandmother who had a focus on the legacy she wanted to leave her mokopuna. She wanted a plan that would ensure that by the time she passed over, she would have prepared kete for each of her 24 mokopuna. As we worked through the PATH she became more and more excited as she reflected on each of her mokopuna – their attributes, strengths, interests and her ideals for them. She talked about the specific things she wanted to leave in their kete. Doing a PATH with her enabled her to clarify her own moemoeā (dreams) for her whānau and also to complete a task that had great significance for her. Numerous other PATHs have been done for individuals who want to look at their future direction, whether it is for career, health, personal wellbeing or studying. In the area of alcohol and drug rehabilitation, the PATH has been used to assist individuals to consider a pathway for life without addiction.

**Whānau PATHs** have included a number of whānau members looking at a direction for their whānau. Sometimes these involve looking at a specific project such as planning for a reunion; in other situations they have focused on whānau projects such as strengthening whānau relationships, rebuilding a homestead and a whānau holiday.

**At a hapū level**, the PATH has been a useful way of engaging hapū members in planning for projects of benefit to the hapū. Some examples of these have been focus on marae and hapū development, advancing a strategy to revitalise te reo Māori, and rangatahi development

**At an organisational level**, the PATH has been an interesting and engaging way of organisations undertaking strategic planning. An example of this is where an organisation wanted an overall strategic plan developed as well as individual team plans. Using the PATH provided a different way for staff members to be involved in planning. The use of the visual graphics enabled really clear links to be made between what the teams were doing and the overall organisational goals. In the iwi and Māori provider research project where researchers engaged with providers to gather information about what makes them successful. In return, some provider's took up the offer of a PATH to be done for them, this enabled reciprocity, the giving back of something to providers in exchange for their contribution to the research.

In these four examples, the PATH methodology was used because it was a structured, collaborative and inclusive way of planning; the end result being a visual representation of the desires of the collective, rather than a written document (see Figure 2 for an example of a completed PATH). Participants enjoyed engaging in the process, and the graphic images served as a visual anchor and ongoing 'documentation' of their hopes and dreams.



**Figure 2. An example of a completed PATH**

### ***The PATH as a research and evaluation tool***

The PATH has been used in a number of Māori communities as a strategic planning tool. It also has the potential to be used as a research and evaluation tool because the process of research involves re-searching for answers and solutions (Cram, 2009). The PATH allows a wealth of information to be gathered, analysed and synthesised in the process of developing a PATH. It also includes elements of programme logic in that it seeks to define aspirations and outcomes, and in the process of determining the best way to achieve these outcomes, conversations focus on reasons why particular activities or approaches will best meet the desired outcomes.

Given that evaluation has a focus on measuring the worth, merit and value of an intervention and determining criteria that will indicate success (Davidson, 2005), the PATH enables the capturing of:

- (1) Dreams and aspirations (outcomes),
- (2) The setting of goals (establishing outputs),
- (3) Where we are now in relation to those goals (baseline data),
- (4) Who needs to be enrolled to provide support and areas that need to be strengthened (capability and capacity), and
- (5) Action planning (measurable indicators).

### **Kaupapa Māori analysis**

This section explains how specifically the PATH has been used in Māori settings and how this method aligns with Kaupapa Māori principles and practices.

The principles of inclusion that underpin the PATH acknowledge that everyone has something to offer and that for some people, as a result of various powerful forces such as racism, sexism, class and disability discrimination, they are forced into the margins of community life and their contributions are restricted by the vigour of exclusion which is shrouded by these prejudiced beliefs. These beliefs separate citizens into the 'us' and 'them' camps, cloud people's awareness of their strengths and deprive communities of the potential of contributions that can be made for the good of all (O'Brien et al., 2010).

The net result can be a changed perception by some of their place in society.

Even when prejudice recedes, citizens face many obstacles thrown up by social pressures that isolate them and exhaust them with busyness. Believing that no one cares or has time for community, we come to think of ourselves less as citizens and more as consumers or clients. (O'Brien et al., 2010, p. 11)

The notion of inclusion comes naturally to us as Māori. In the context of using this tool with whānau the principle of inclusion promotes that all whānau members who will be affected by the PATH be included and that the collective ideas and views of all are welcomed and embraced. It means that all ages, all whānau members, all levels of expertise and experience are valuable in planning.

### **The PATH connect to whānau, hapū and iwi a number of ways**

#### **Moemoea and tūmanako: dreaming and visioning**

The first step in the PATH process invites whānau to dream about their ideals and aspirations for the future. Often in Māori settings this causes some to reflect back on ideals from the past and is the place in the PATH where we 'remember' others and their deeds. Our old people engage particularly well at this point. I remember one PATH I facilitated where a kuia (an elder) cried as she saw the images as they reminded her of heartfelt aspirations for her whānau. Young people get enthused and excited when they are given permission to create a picture of their ideals. What I have learned is that when you give the participant the pen to create their own images of their ideals, they create an image that has a 'pull' for themselves and others toward those ideals. Often these images will contain Māori symbols such as the poutama, the awhiowhio, the koru and harakeke – images that provide powerful cultural hooks to concepts, ideals and visions.

### **Marae-based facilitators**

I was originally approached to facilitate strategic planning sessions for 13 marae. Following discussion it was agreed that a PATH Facilitator training course would be held for representatives from each marae, and thus build marae-based capacity and capability. This was thought to be more valuable in the longer term. All 13 marae completed their strategic plans and they are now displayed in their wharekai for all to see. They contain powerful images, symbols and words of relevance to each marae.

### **The spread of PATH amongst whānau**

One of the participants was also studying at a Whare Wananga and shared the PATH with individuals as a way of planning their study programme. She reported that this was a very useful way of participants getting clarity around their course of study by taking them beyond their studies to envision themselves having completed their study and utilising their learnings in their chosen ways. Six months later I was approached by the Whare Wananga to organise a PATH Facilitator training session for staff that were working in iwi-based settings. The PATH is now a tool that is used in their indigenous studies programme.

### **Tikanga whakahaere: guiding principles**

Each of the symbols that are expressed in the moemoeā is a representation of something of importance. So for each symbol, we identify the values that underpin that symbol. These values provide guidance on the PATH journey and are identified in one or two words (e.g. rangatiratanga, manaaki tangata, hauora, mātauranga). When these values are expressed and captured in te reo Māori they provide further meaning and serve as markers for 'why' particular pathways are to be taken. Often whānau have their own tikanga and/or kaupapa (purposes) that bring them together, such as whakapapa (genealogy), whenua (land), te reo (revitalisation of the Māori language) or the strengthening of their ties and relationships as whānau members. Sometimes the tikanga that guide whānau are intrinsic and often not necessarily in their conscious awareness until they are asked to think and talk about them.

### **Ngā whāinga: the objectives**

The place in the PATH where specific and measurable goals are set is where a symbol in the moemoeā section will be focused upon and a milestone that is both positive and possible to achieve within the timeframe will be ascertained. It is also at this point where PATH participants make a conscious decision to strive toward achieving the particular milestone. A trained PATH facilitator working in Taitokerau with rangatahi has used PATH extensively in his work with rangatahi in helping them to set goals for themselves. As an iwi practitioner, he now uses PATH as a framework for all his work.

### **Me pehea tātou i tenei wa? How are we all at this point in time?**

When asking participants to reflect on where they are now in relation to where it is that they want to be, this requires robust discussion about the reality versus the ideal. It also helps to focus on what is working or happening that is positive in addition to what is not happening, as sometimes the reality can seem daunting. This can create some tension, as the distance between the present and the desired situation may be cause for concern; however, the PATH promotes tension as an 'asset' for change. Often in a hui or whānau setting, some people know more than others and therefore it is important to get a gauge from a variety of participants, as their perspectives will differ. Good PATH facilitation can involve mediating between factions of the whānau in order to reach agreement, consensus or to acknowledge difference.

### **Awahi mai, awahi atu: providing support for one another**

There are certain points in the PATH planning process where participants are invited to consider who they need to 'enrol' in their dream, and what areas they may need to strengthen amongst themselves in order to achieve their stated milestones. It is important that when

facilitating this discussion that the process is able to affirm and validate for whānau their internal resources and capabilities while at the same time exploring the potential external sources of guidance and support.

### **Utua te kino ki te pai: turning the negative into a positive**

In adapting the PATH tool for use in Māori contexts, I added a section into the PATH called 'blocks' and this provides an opportunity to consider the blocks and barriers that might prevent whānau from reaching their goals and aspirations. Alongside this though a session on how to minimise the blocks has been a useful way of supporting a constant focus on the goals and aspirations as opposed to the blocks and barriers.

Facilitation must ensure that all participants are engaged and contribute to the PATH and that the process incorporates interactive and fun participation. Allocating enough time to complete the process is important as well. In addition, it is imperative that the cultural nuances of the people are understood and captured and that facilitators also have a critical analysis of the context, the relationships and dynamics amongst those participating.

### ***Pre-testing with whānau***

This section investigates feedback from whānau who have participated in PATH planning and comments on whether or not they think the PATH is a good research tool for whānau.

At many stages of participation and engagement in the PATH process, there was feedback that indicated a sense of satisfaction with their involvement, for example:

- The concept of moemoeā is particularly powerful in the PATH. Whānau loved the opportunity to dream about their ideals, to consider a picture of what success might look like and to see this picture created before them in visual form. The opportunity to find symbols, to use colour to express these ideals was exciting for some and challenging for others. This excitement appeared to be based on the notion of being given 'permission' to dream – the magic wand is in their hands, and it is for them to identify what their ideals are. This seemed to provide the 'hope' factor to the PATH process. For those that 'held the pen' and drew the graphics on behalf of the whānau, they captured thoughts and aspirations using symbols of relevance to the whānau and the images became powerful. This also enabled a good representation of their whānau experiences.
- The concept of maumahara (remembering) is evident here also as often what is envisaged as an ideal for the future is based on what has happened in the past. Many whānau enjoy looking back, remembering the deeds of their tīpuna (ancestors). Seeing their dreams and visions visually displayed was a 'driver' and provided a 'pull toward' that destination. Challenges included their ability to visualise their ideals in symbolic form, their feelings of inadequacy at 'drawing', and for others the challenge of articulating these aspirations. Sometimes the gentle nudge or the push 'beyond' what they 'think they want' was also challenging in that there was a realisation that what they thought they wanted was a means to an end and not the end. In some cases, individuals who tend to 'live in the moment', were tested by this idea of looking into the future, particularly when they cannot see past the now, or when they do not in fact 'see pictures'.
- The PATH draws on, taps into and elicits tikanga of whānau, hapū and iwi. Participants are invited to consider the values that underpin the PATH. The values are elicited from each of the symbols in the dream section. The question is asked, if this symbol is a representation of something that is really important to you, what is this thing? In Māori settings this is translated as the tikanga (principles and practices) or the pou (markers) that will guide them on their journey. With guidance, questioning and support, whānau can tell you quite clearly what these values are. What they enjoy and find challenging at the same time is hearing the perceptions of others in relation to the same values, for example, a symbol of a pāharakeke (flax bush) might mean the wellbeing of the whānau to some, and the complexities and conflict amongst the whānau to others. Defining values is also about



bringing to their conscious awareness that which lies within the unconscious mind, for example, a symbol of a korowai (cloak) might represent the importance of language, culture and identity, that which is a constant in their lives, but because they are living and breathing these things on a daily basis they may not have realised the value until going through a process of having to articulate the importance of these things.

### **Feedback about the method**

Positive feedback about the PATH as a method in the main related to the use of graphics, colour and symbols, alongside a well facilitated process that “*made them think critically*” and resulted in a visual representation of their hopes and aspirations and a plan going forward. For pakeke or kaumātua (elders), they enjoyed the dreaming stage as the pictorial presentation of their moemoeā became vivid and reminded them of their past, as often moemoeā are based on what our tīpuna would have wanted and so to look forward is to look back. Rangatahi love the opportunity to dream, to draw, and to imagine possibilities that lie ahead. A PATH is visual and whānau are encouraged to keep it in a prominent place so that it continues to remind them of where they are going and what specifically they need to do. Whānau love the fact that the PATH is theirs and that they can see it daily and be reminded about what’s important to them. It becomes part of a process as opposed to being an event in time. It motivates, it gives hope, and it is an opportunity to re-present their ideas. It is a great way of getting everyone on the same page – common vision, a stock take of where they are now in relation to the vision and who they need to get on board with their vision, clear goals, concrete steps toward the goals and affirmation of themselves and their future.

The kinds of things that whānau have said are:

*Far out – this is cool, I can see where I’m going and I’m gonna do this.*

*This was an amazing way to get our whānau engaged and on the same page about our future.*

*I am excited – It’s a great way to get it out of your head and to see it – better than words on paper.*

There has never been any significant negative feedback on this as a process, other than when the PATH is used to elicit information for purposes other than the primary interest of the whānau, such as for government purposes. Whānau will ask that certain aspects of the information are protected for their eyes only or they want to ensure that the information is not misinterpreted, or that their context is well understood.

There is no doubt that other whānau would consent to being involved in research using this method. It is a great way for whānau thoughts and ideals to be captured in one place so succinctly. The key to whether whānau will engage in this process is partially dependent on who’s holding the pen and the level of trust that whānau feel to engage with the person and the process.

### **Conclusion**

Working with PATHs over the last eight years has shown that the PATH process results in a picture of aspirations and intentions and a plan for the future that is an exciting way of engaging with whānau. A key strength to the success of the method is in the facilitation of the PATH. It requires highly skilled facilitation and has the best result when a wide number of whānau members are involved in the process to ensure collective input. The other valuable aspect about the PATH is that whānau determine the measures of success and it is *whānau who decide what success looks like for whānau*. Good facilitation will ensure that whānau are supported to reflect on what they do well and what works and doesn’t work for them as a

whānau in engaging with one another. In my experience this method is easy to learn and apply and can be taught to others to share with others. I think that it is a good method for research with whānau particularly as if you can teach whānau members to do PATH's amongst themselves then they are in control of the process as opposed to being reliant on an external source to facilitate the process. The main limitation of using the PATH tool is in the follow-up, ensuring that there is a way of coordinating actions to ensure the PATH is put into action.

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An annotated bibliography is available from the author upon request.

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