

E Tū Whānau **Tikanga** **Rangahau** Community Kete

E ai ki ā rātou ake kupu In their own words

Over many years, our whānau have generously provided us with deep, rich narratives on the significant role E Tū Whānau has played in their lives and in their communities.

These rich narratives have formed a puna, giving rise to a well-spring of profound stories about the significance of E Tū Whānau.

As E Tū Whānau has gone from strength to strength, the demand has grown for both quantitative as well as qualitative Kaupapa Māori data to assist whānau, communities and MSD to understand the impacts of E Tū Whānau, across a wide range of communities and stakeholders.

This demand challenged us to find a way of quantifying the impact and dynamics of E Tū Whānau in authentic ways that express the unique nature of E Tū Whānau communities.

This innovative resource, co-designed with whānau and communities, draws on both quantitative and qualitative methods to identify, map and measure the impact of change over time within E Tū Whānau communities.

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Ngā aratohu – Guidelines for use

E Tū Whānau has engaged closely with whānau and hapori to develop a suite of kaupapa Māori measurement tools – including *E Tū Whānau Tikanga Rangahau Community Kete*.

Given this whakapapa and the shared tikanga and ongoing expectations concerning its use, it is important to note that:

(i) the tool (including the concepts, frameworks, approaches, and resources) is intended for use by E Tū Whānau, whānau, and hapori.

(ii) the tool is carefully designed to be used in the manner described, with the components used as a whole.

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Acknowledgements

We gratefully acknowledge the wholehearted and generous contributions of every individual who participated in this rangahau, bringing significant experiences and understandings of participants, whānau and communities into the ‘world of light’.

In this pilot project, the depth and richness of the kōrero from you, the participants, is the core of the Tikanga Rangahau. Your kōrero provided rare, rich insight into how whānau and communities identify change as something deeply meaningful to them. It is from this kōrero that we are able to recognise the profound value, meaning and significance of E Tū Whānau.

To the whānau, kahukura and all participants of the research with Mōkai Pātea, Consultancy Advocacy and Research Trust (CART) (Auckland, Taradale, Whanganui, Patea and Poroporo) and Te Rūnanga o Tūrangānui a Kiwa (TROTAK): without your aroha and the depth of your kōrero, this project would not have been possible. It has been an honour and a privilege to participate in this research with you and to learn of your experiences and insights about how E Tū Whānau is part of your daily lives.

To Dr Lara Greaves, data lead and author of the Tikanga Rangahau Technical Report, and Fleur Chauvel, field research lead and author of the Tikanga Rangahau Community Kete, we are deeply grateful for your continued commitment and leadership throughout this project. To the E Tū Whānau team and field researchers engaged in this project (Tria Tamaka, Keelan Ransfield, Heni Turner, Anne McKenzie and Mat Mullany), your unwavering support to this project throughout COVID-19 and other challenges is deeply appreciated.

Finally, we acknowledge the valued support and expert advice of the Whānau Reference Group (Whetu Wereta, Len Cook, Andrew Sporle, Ministry of Social Development (MSD) Chief Science Advisor Professor Tracey McIntosh), and Kahukore Baker from MSD’s Research and Evaluation Insights team who, as project lead, drove all aspects of this research project.

Te mana kaha o te whānau!

In memory of Ann Dysart (Te Rarawa)

Ann Dysart was the initiator and guiding force behind Tikanga Rangahau. In her role as founding Pouwhakahaere of E Tū Whānau, she understood the significance of the change the kaupapa was supporting within whānau and hapori Māori. She also knew the vital importance of evaluating and evidencing this change and commissioned the Tikanga Rangahau research project to this end. Sadly, she passed away in 2021 before the work was complete. However, the Tikanga Rangahau journey and resulting data and resources help bring to life Ann's moemoeā and they honour her legacy.

Ann had enormous mana and integrity. She was as loved and respected by communities of all faiths and cultures as she was by iwi leaders and whānau living in marginalised communities.

Ann is remembered by many people for many things, notably her unwavering advocacy within government for those without a voice. Throughout her working life, she designed and implemented innovative social sector initiatives, all with the purpose of improving the lives of those routinely disadvantaged by our systems. She worked relentlessly to give Māori, and whānau of all ethnicities, real power to influence decisions affecting them and their communities.

This culminated in Ann's visionary work at the Ministry of Social Development establishing and growing E Tū Whānau – a kaupapa Māori movement for community-led, positive change to address violence within communities – in partnership with iwi, community leaders, and whānau from all walks of life.

For this, and her accomplished and dedicated public service career, she was awarded the prestigious Te Tohu Ratonga Tūmatanui o Aotearoa (New Zealand Public Service Medal) for outstanding commitment to New Zealand and New Zealanders, and the Public Service Commissioner's Commendation for 50 years of exceptional service.

Tikanga Rangahau was forged out of Ann's wisdom and foresight and its completion is a tribute to her vision. It also validates the whānau-centred, values-driven approach of E Tū Whānau, providing meaningful data and tools to better understand and evaluate change within te ao Māori.

E te Kuia morehu, moe mai rā (Rest in peace, esteemed elder).

In memory of Whetumarama Wereta (Ngāi Te Rangi, Ngāti Ranginui)

Among a myriad of commitments, Whetumarama Wereta was a member of the Whānau Reference Group, established to provide expert advice to E Tū Whānau Tikanga Rangahau. While Whetu's death in 2023 prevented her seeing the culmination of this work, her advice echoes throughout the mahi.

Known for her intelligence, thoughtfulness and quiet yet firm leadership, Whetu was a trail blazer contributing to both qualitative and quantitative research, including the Māori Welfare league survey in 1978. She was involved in population policy from its beginnings and was a representative of New Zealand at the First International Population Conference in Bucharest in 1974. Whetu was also a member of the Picot Taskforce on education, the Royal Commission on Electoral System and the NZ National Commission for UNESCO, among others.

Whetu became the first manager of the Māori Statistics Unit at Statistics New Zealand, laying the groundwork for crucial developments like iwi classification and affiliation, and measurement of the health of te reo Māori. Whetu developed the Māori Statistics Forum of leading Māori researchers and constitutional thinkers which, among other things, introduced the bilingual census form, Māori statistical scholarships and the Māori statistics frameworks. Whetu and Darin Bishop took their work on indigenous statistical frameworks to a UN conference about indicators of indigenous wellbeing in Ottawa in 2007. Her continued vision and leadership inspired Te Kupenga and Tatauranga Umanga Māori, paving the way for what we now call Māori data sovereignty.

Whetu's legacy extends far beyond statistics, nurturing a generation of Māori leaders who continue to shape the landscape. A much-treasured mentor and advisor on projects, Whetu's extraordinary knowledge and wisdom, along with her humility and perseverance created a legacy and a path for others, instilling a deep desire within the community to understand key concepts through a statistical lens, empowering them to measure and advocate for their well-being.

E te Kuia morehu, moe mai rā (Rest in peace, esteemed elder).

Researchers' reflections

The research team heard such empowering and important changes through the piloting of E Tū Whānau Tikanga Rangahau that it is our hope that this kete can encourage and support communities to give the rangahau process a go themselves.

The kete has been developed with our deep appreciation for the significant knowledge generation and contribution through each person's participation in the piloting of the research process. The three communities so generously supported and participated in the rangahau in every way. They stuck with the research and research team during the arrival of the Omicron COVID-19 outbreak in Aotearoa and severe weather events. They were prepared to be a part of the research through Zoom and phone if in-person engagement was not possible. This ended up providing different and valuable experiences and learnings that we are now able to share in this kete.

We remember Whaea Ann's vision in our hope that the kete can tautoko E Tū Whānau communities and provide guidance as they use and participate in the Tikanga Rangahau process to measure the change and impact of E Tū Whānau and to inform their ongoing transformation journeys and meet community needs.

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Background

This kete has been developed to support E Tū Whānau communities to undertake a kaupapa Māori-designed research process to understand the impact of E Tū Whānau in their communities. This research process, called *E Tū Whānau Tikanga Rangahau*, was recently developed alongside three E Tū Whānau communities.

It is intended that E Tū Whānau Tikanga Rangahau will be used by E Tū Whānau and E Tū Whānau communities to understand and demonstrate the positive difference and changes that have occurred for communities because of E Tū Whānau. This will enable the value and impact of E Tū Whānau to be understood by communities themselves, as well as others seeking to understand the transformation that is possible through E Tū Whānau over time.

This kete provides a 'how to' guide to support communities to use E Tū Whānau Tikanga Rangahau. The kete draws on and shares the research team's reflections and learnings as they experienced each stage of E Tū Whānau Tikanga Rangahau together with the three E Tū Whānau communities.

Whakapapa: How E Tū Whānau Tikanga Rangahau and this kete came to be

From the very beginnings of E Tū Whānau, the founder, Whaea Ann Dysart, focused on opportunities to capture and demonstrate how the E Tū Whānau movement was being brought to life by communities as well as the value and difference it was making. For Whaea Ann, it was important that communities had relevant resources available to support their ongoing E Tū Whānau journey.

Whaea Ann firmly believed in the importance and value of research and evaluation and this has been entrenched in the kaupapa from the early days. She valued the stories of positive change that flowed from the qualitative research (research based on the words and narratives of people describing their thoughts and experiences) that she widely instigated across many E Tū Whānau communities. This has led to a strong qualitative evidence base on the significance and success of E Tū Whānau. Whaea Ann also remained focused on the challenge of finding relevant and appropriate methods that would enable quantitative (number-based) measures to demonstrate the value-add and impact of E Tū Whānau.

In 2019, Dr Lara Greaves and Andrew Sporle completed a literature review and scoping paper to explore what kaupapa Māori process could be developed to support quantitative evaluation of E Tū Whānau. The challenge was to identify a process appropriate for the kaupapa Māori nature of E Tū Whānau, while at the same time being able to produce quantitative data that could be consistently gathered across diverse E Tū Whānau communities and participants over time. It was important that the process did not require too much of a participant's time and was sufficiently flexible to adapt to the diverse experiences of E Tū Whānau.

The review identified that a traditional pen and paper survey process would be inappropriate. Rather, a guided conversation process was proposed, based on a small number of specific questions that were broad enough to be relevant to diverse participants and E Tū Whānau experiences while at the same time focused specifically on the changes experienced through E Tū Whānau.

E Tū Whānau Tikanga Rangahau – The research process

In essence, a quantitative data collection process was developed to take place in a kōrero-based way (guided conversations). Through this process, a research team works alongside and guides participants (individually, in pairs or small groups), kanohi ki te kanohi (face-to-face) to name changes in their own words that they have seen and experienced in their whānau and community because of E Tū Whānau. Of importance to the process was the researcher's facilitation of a welcoming space, which incorporates cultural provisions such as mihi and karakia, and where participants feel safe and empowered to share the changes they have experienced and know that their kōrero is valued.

The guided conversations are to take place with kahukura¹, fund holders, external stakeholders (e.g. police), whānau and individuals in a community (possibly up to 30 conversations). The resulting data ends up being a large list of all changes (each change captured in a few words or sentences) generated collectively from across the guided conversations. These data are then coded against high-level E Tū Whānau change indicators / areas. From this, we can then numerically see the areas where there have been the largest changes in the community, as well as the breadth of different changes and by different participant types.

It is also possible for E Tū Whānau Tikanga Rangahau to be used successively by communities (either with the same or similar participant groups) to explore the differences in the types and proportions of changes within communities across time.

The aim has always been for a research process that can be used by communities themselves. It was important that the process would be relevant and work for different E Tū Whānau communities. Therefore, this process has been piloted and co-developed with three very different E Tū Whānau communities.

Developing E Tū Whānau Tikanga Rangahau alongside E Tū Whānau communities

Early on, E Tū Whānau selected and invited three communities to be part of piloting and developing the research process. They have been involved with E Tū Whānau for different lengths of time. Their size, make-up and way in which they work and have engaged in E Tū Whānau all differ.

Mōkai Pātea Services², the first community to participate in the co-development and piloting process, suggested the research process be called 'E Tū Whānau Tikanga Rangahau'. Guided conversations were held with nineteen whānau, kaimahi, community stakeholders and kahukura in April and May 2022.

Despite planned intentions and a strong desire for the conversations to be in-person, all ended up being completed by Zoom due to the COVID-19 pandemic. All introductory and planning hui also took place by Zoom (October 2021-March 2022).

¹ E Tū Whānau kahukura are those people who inspire and lead change in whānau and communities.

² Mōkai Pātea Services is an iwi mandated provider based in Taihape, servicing whānau of the four iwi of the Mōkai Pātea Confederation: Ngāti Whitikaupeka, Ngāti Tamakōpiri, Ngāti Hauiti and Ngai Te Ohuake, alongside any whānau seeking its services. Mōkai Pātea works with others to provide wrap around Whānau Ora health, social and iwi / hapū development services. It is the sole local provider involved in the Family Violence Interagency Response service (FVIARs).

Consultancy Advocacy and Research Trust (CART) was the second E Tū Whānau community to participate³. Guided conversations were held with 24 whānau, kahukura and community stakeholders between August and December 2022. As CART communities are based across different North Island regions, the research team visited communities in four locations. All guided conversations were conducted in person, kanohi ki te kanohi. Introductory and planning hui took place by Zoom (February to July 2022).

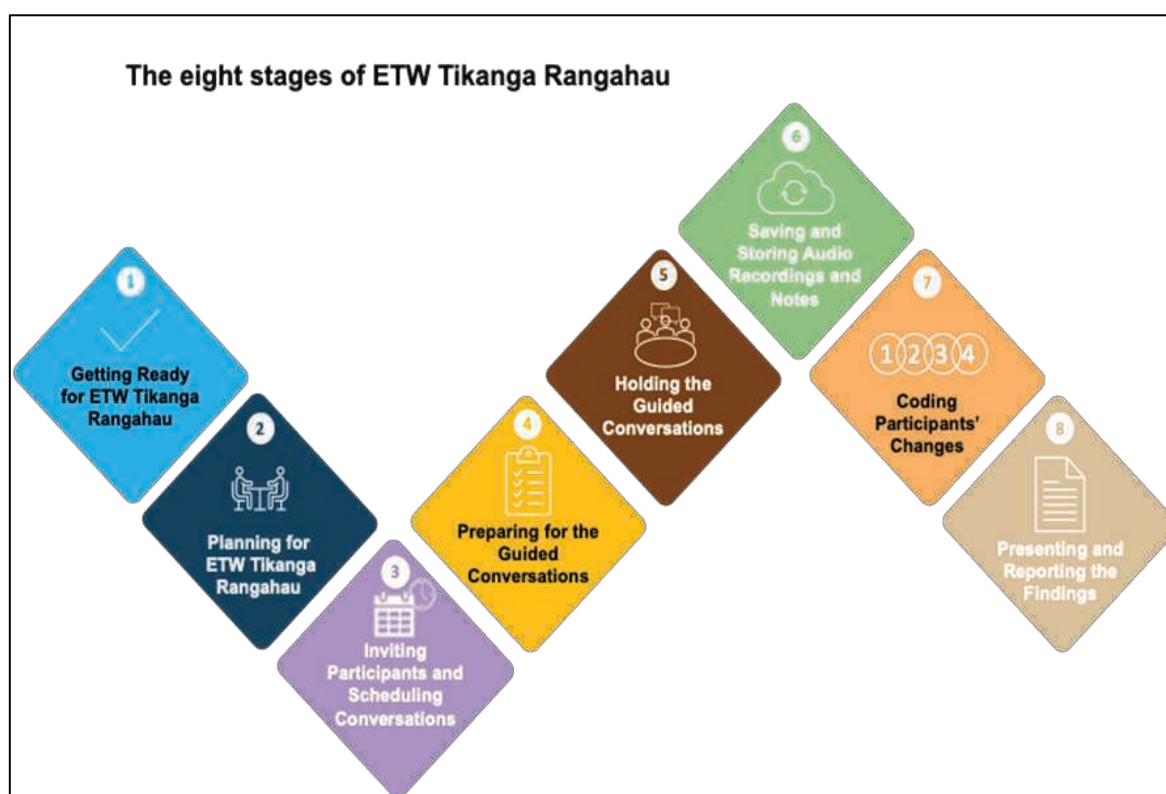
The third community to participate was Te Rūnanga o Turanganui a Kiwa (TROTAK)⁴. Guided conversations took place with 16 whānau, kahukura and stakeholders in November and December 2022. November conversations took place in-person and the December conversations took place by phone.

The diversity of these communities and the different ways in which the guided conversations took place (by Zoom, in person, and by phone) gave an excellent basis to experience and develop E Tū Whānau Tikanga Rangahau.

Summary of the eight key steps of E Tū Whānau Tikanga Rangahau

The kete is organised by and provides a step-by-step guide to eight key stages of carrying-out the E Tū Whānau Tikanga Rangahau as summarised on the next page.

Figure 1: The eight key steps of E Tū Whānau Tikanga Rangahau



³ CART works with marginalised communities and 'hard-to-reach' whānau, with a focus on the whole whānau. CART supports and enables access to employment opportunities, education and training, health care, mental health and addiction services.

⁴ TROTAK represents the interests of the three iwi of Turanganui-a-Kiwa: Rongowhakaata, Ngāi Tamanuhiri and Te Aitanga a Mahaki. TROTAK provides a broad range of services across Whānau Ora, social services, education, training and development.

Step 1: Getting ready for E Tū Whānau Tikanga Rangahau

This first step involves identifying who the research team will be and bringing that team together, as well as deciding what other roles may be needed to support E Tū Whānau Tikanga Rangahau to be carried out. This step discusses why it is important to make sure that the time is right, and the community is ready to undertake the rangahau.

Step 1 also describes the process for developing a participant Information Sheet and Informed Consent form. This is important to ensure participants fully understand the research, what their participation will mean and how their information will be protected.

Step 2: Planning for E Tū Whānau Tikanga Rangahau

Step 2 involves working with community kahukura; first so that they gain a good understanding of E Tū Whānau Tikanga Rangahau and what is needed and second, to plan the logistics for how the rangahau will take place. This includes decisions about the number of participants, how they will be invited, and where and how the guided conversations will take place. Key activities in this stage of the process include a series of planning hui with the community and research team, and the development of a research plan.

Step 3: Inviting participation and scheduling the guided conversations

Step 3 involves engaging with potential research participants to invite their participation in a guided conversation and ensuring that they are provided with the information that they need to make an informed decision about whether to participate. This includes providing them with the Information Sheet and Informed Consent form. The guided conversations are then scheduled for a time and date with the participants and research team. Most likely this part of the process will be undertaken by community representatives.

Step 4: Preparing for the guided conversations

Step 4 involves a training or pre-briefing session to make sure the research team is collectively prepared to facilitate the guided conversations. This step also describes the different arrangements to be made before the guided conversations take place. These include arranging koha, kai, Zoom meeting links and the Informed Consent forms and Information Sheets.

Step 5: Holding the guided conversations

Step 5 involves the facilitation of the guided conversations and participants naming the changes that have taken place, as linked to E Tū Whānau. These changes are recorded by the researcher(s) and form the data that are later coded and reviewed.

Step 6: Saving and storing audio recordings and notes

Step 6 describes the process for saving and storing participants' information to protect the confidentiality of participant data.

Step 7: Coding participants' changes

Step 7 guides how to summarise and categorise all the changes participants have described to be able to quantify the data. This section provides resources to support this process, including a table of change indicators and a Microsoft Excel template to use.

Step 8: Presenting and reporting the findings

Step 8 suggests how the findings can be presented and reported to the community.

Step 1: Getting ready for E Tū Whānau Tikanga Rangahau

Choosing the research team

One of the first key steps is deciding who the research team will be and identifying any other key roles important to the running of E Tū Whānau Tikanga Rangahau.

- Who will lead the research and who will make up the research team?
- What are the abilities, strengths and experience needed for these roles?
- Might upskilling be needed?

Strengths of the research team involved in the piloting of E Tū Whānau Tikanga Rangahau included:

- the involvement of Māori researchers
- lots of past research experience and knowledge
- lots of experience working with communities
- knowledge of E Tū Whānau – one of the research team included an E Tū Whānau team member who had whānau connections to kahukura from one of the communities
- past experience completing research with different E Tū Whānau communities
- being adaptable to changing circumstances and timeframes which affected the research.

The research team was guided by the kaupapa Māori research practices and researcher qualities set out by Linda Tuhiwai Smith in her 2012 book *Decolonising Methodologies: Research and Indigenous Peoples* (p.120):

- Aroha ki te tangata (respect for people)
- Kanohi e kite (the seen face; that is, present yourself to people face-to-face)
- Titiro, whakarongo. . . kōrero (look, listen. . . speak)
- Manaaki ki te tangata (share and host people, be generous)
- Kia tūpato (be cautious)
- Kaua e takahia te mana o te tangata (do not trample over the mana of the people)
- Kaua e mahaki (do not flaunt your knowledge).

Professor Smith and her work is well known and regarded in indigenous education and research and can be accessed by anyone interested. Websites such as <http://www.maramatanga.co.nz> can also be accessed for rangahau insights.

It is also important to consider possible conflicts of interest, competing interests or matters that could affect the research. For example, if a researcher is well known to participants, will this have the positive effect of putting people at ease and encouraging them to take part? Or could familiarity cause people to hold back about openly discussing their changes if they're worried that they may be judged by someone who knows them or their whānau?

The size of the research team is also something to consider. We had three people in the team for the pilot, which we found useful. It meant that the guided conversations could easily be facilitated by two researchers (including if the third team member was unavailable).

Benefits of having more than one researcher included:

- being able to use the different members of the research team to support and drive, if necessary, the organisation of the guided conversations
- having one researcher who could ask the questions while the other researcher recorded full notes. This meant that the notes and changes could be reflected back to the participant and considered together, by the participants and researchers
- possibly helping the participants to feel more comfortable as they did not have to engage intently with one sole researcher for the whole time
- a team approach to later reflect on the shared kōrero.

Other roles

Something else to consider is whether there need to be other roles set up to support the research and the team. Perhaps extra people needed in advisory and / or support roles to, for example:

- invite people in the community to participate in the research and work alongside them to ensure they have all the information they need to understand the research
- support participants if issues come up for them during the research
- provide advice if questions arise about the research process
- help with decisions if questions and challenges come up
- provide advice and guidance, and raise matters for consideration overall
- take responsibility for logistical and administrative matters.

Is the community ready?

E Tū Whānau Tikanga Rangahau aims to understand the changes for whānau and communities over time because of E Tū Whānau.

This means the rangahau process is best timed to happen once there has been the chance for the E Tū Whānau values and kaupapa to be understood within the community. Further, it is important to allow time for change to have happened so that the change can be recalled, reflected on or described.

The right circumstances need to be in place for the rangahau to occur successfully and without overburdening or placing additional pressure on the community.

Community readiness for the rangahau can be negatively affected by matters or events that have disrupted the impact of E Tū Whānau in a community. This could include anything from changes in key people who have been driving E Tū Whānau in their communities or a local incident or particular societal issues that have emerged, changing dynamics or requiring specific focus. Research will be challenging if a community needs to respond to unexpected issues that suspend business as usual and divert their focus to other priority issues – for example, COVID-19 and civil emergency events, as recently experienced in Aotearoa.



Learning

Changed circumstances disrupted the readiness of two communities who were going to be the first to participate in E Tū Whānau Tikanga Rangahau – even though they were really keen to still be involved.

One community had paused and was resetting its E Tū Whānau focus given changes in relation to their key kaimahi and a significant refocusing on deprivation issues in the community. The other community was heavily involved in the COVID-19 response while also dealing with the effects of severe weather events. Both were not ready to participate at the beginning of the rangahau piloting as planned.

These experiences showed the importance of open conversations to be able to understand community readiness, and for the community not to feel that it should press on with the rangahau if the time was not right. Those leading the research within the community may also need to recommend that the research be put on hold if they see that the time is not right, or that the community or parts of the community are not ready or are struggling to engage.

Preparing information for participants: Information Sheet and Informed Consent form

One of the important foundations of research is informed consent. Informed consent is the process of providing potential research participants with enough information about the research and what their participation will involve so that they can properly make an informed, voluntary decision about whether to participate in the research, and to understand what this participation will look like. This includes providing information to participants about the purpose of the research, what participation will involve, how their information will be protected and used, and their choices and rights.

Such information is provided to the participant in an Information Sheet and Informed Consent form. The researchers will go through the Informed Consent form with the participant at the beginning of the research process. The Informed Consent form sets out the parameters of participation that the participant agrees to.

The Information Sheet and Informed Consent form provided to participants for E Tū Whānau Tikanga Rangahau is in Appendix A.

Informed Consent considerations

Various considerations related to informed consent include:

- Will it just be the research team who has access to the details and data of participants?
- How will this be ensured?
- Will the guided conversations be audio recorded (with participant's agreement)?
- Some of the key matters to work through are outlined below.

Positives and negatives to recording kōrero

Not recording might be less concerning for participants and put them more at ease. At the same time, participants may want their kōrero recorded. Recording will mean an exact record of the participant's kōrero can be referred to when reflecting on what has been heard (including context). It also provides an oral record that can be given back to the participant.

Choosing to audio record

For the pilot, the research team chose to audio record (with the participants' permission and where this was technologically possible). We wanted to make sure that there was a full and accurate record of the discussions, particularly given it was a pilot process, and to be able to offer back the recording to the participants. However, we made it clear to participants that no-one outside of the research team would have access to or hear their recording.

What happens to any audio recordings and notes?

Participants in the pilot were asked if they wanted the audio recording and notes of their conversation returned to them. If they said no, we asked whether they wanted the research team to hold these securely for a period of two years or if they wanted the recordings and / or notes deleted at the end of the research. We considered that it was important to provide these options to participants rather than assuming that it was okay to simply delete them and the knowledge that they had shared. Therefore, it is important to work this through and offer the options to each participant so that they can make an informed decision.

Sometimes participants will say that they do not mind what happens to their notes or audio recordings and leave this decision for the research team. In such cases it is good for the research team to decide beforehand what to do with the notes and recordings, to have a default position. For the pilot, we decided that if participants did not indicate a preference, we would delete the notes and recordings at the end of the research project.

Keeping information private in group settings

Considerations related to keeping information private in guided conversations that take place in groups might include:

- What happens if two in a group want the notes or recording of a conversation deleted, but two do not?
- What happens if there are different views on whether the conversation should be recorded?

In a group setting, the researchers cannot promise that information will be kept private. At best, researchers can talk to the participants about this and how they may protect each other's kōrero.

Differing group views

When there are differing group views on whether to audio record or not, a solution may be to ask the participant(s) who do not want to be recorded to take part in a separate conversation (which would not be audio recorded). If there is no agreement on what should happen to conversation notes and audio recordings, it may be best to return the notes and audio recordings to each participant at the end of the research – they can then decide what they would like to do with them.

Timeframe for participants to withdraw or add information

Sometimes people say personal or private things in research but later decide that they do not want that information to be included in the research data. Therefore, it is good practice to give participants a period of time after the guided conversation to be able to withdraw some or all of their information. We indicated a two-week period as it was unlikely that we would

have used information from the conversation by then, and this gave participants a couple of weeks to reflect on what they had shared.

Sometimes people might want to add more to what they said after the guided conversation has finished. The two-week timeframe is probably a good guide for this too.

Serious concerns about a participant's wellbeing

Before the guided conversation starts, it is important that the participant is made aware that the researchers would need to break confidentiality if, during the conversation, they developed serious concerns about the participant's wellbeing (such as being at immediate risk of harming themselves or others). The research team should also make sure that there is a pre-agreed contact within the community as to who will be the go-to person if such concerns arise, and to make sure that the participant is appropriately supported.

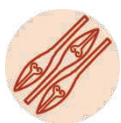
Providing koha to participants to recognise their participation

Koha can come in a range of different forms, for example, a voucher to a monetary value, food, a hamper or a treasured item. If a monetary value, the amount should not be so much that it acts as an inducement to participate – that is, it cannot be so much that it changes someone's decision to participate or not. Nor should it be inadequate. Rather, the purpose is to acknowledge and reciprocate the contribution and knowledge that has been given.

Consideration may also be given to provide reimbursement towards participants' costs if they have travelled to take part in the research (for example, public transport reimbursement or a petrol voucher).

The importance of informed consent

The informed consent process might be seen as onerous or formal by some participants. It is important to remember it has a purpose and helps to avoid assumptions and uncertainty. It provides an important ethical element and can have the positive effect of providing participants with an added layer of trust and credibility in the research. The informed consent process can be seen to signal the 'official' nature of the process. It also ensures that participants have their say and control over whether and how they participate and what is to happen to their information.



Learning

Koha

During our piloting, all participants were provided koha in the form of a supermarket or petrol voucher to the value of \$30 (except for some government stakeholders who were unable to accept koha due to their roles). The amount had initially been decided when it was thought that the guided conversations would be quite short. However, in practice these took about one hour on average. As such, the research team considered the initial amount inadequate and in need of revision.

Petrol vouchers were available to contribute to travel costs for those who had travelled. However, we found it difficult and awkward trying to work out who to provide a voucher to. It is uncomfortable asking people about this, and, more likely than not, people will say not to worry even if they have used their petrol or spent money to get to the venue.

Rather than providing a contribution to travel, a suggestion is to instead add to the koha to recognise that people may need to use their car or other transport to participate.

Research participant considerations

Types of participants

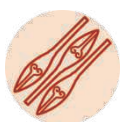
The research process has been designed to have participation from three different types of participants:

- **Individuals and / or whānau** that have been or are engaged with E Tū Whānau in the community (those who E Tū Whānau is designed to help directly). Their perspective is mainly based on their own / whānau experiences.
- **Kahukura** (community leaders, influencers, kaimahi) who may have a perspective not just on their own / whānau changes but also changes that they have seen in the community and whānau they have supported.
- **Community stakeholders** with knowledge of E Tū Whānau in the community. This could include representatives from iwi, marae, health, social services, police, education, sports clubs or community members not part of E Tū Whānau but aware of its impact. This group may have views on the changes they have seen in the community.

These different participation types are important. The different perspectives of each participant type will contribute to a fuller understanding of changes experienced in the community as they will have different insights into changes that have taken place.

Where E Tū Whānau in a community has directly engaged individuals and whānau from different age groups, genders and cultures / ethnicities, it is important that the research participants also come from these different groups. Change, or views of change, may differ depending on the different perspectives brought by rangatahi, pakeke, kaumātua, tāne and wāhine, for example. On the other hand, if E Tū Whānau mahi has been focused with wāhine of a particular age group, then individual participants should come mainly from this group.

To be able to understand the full extent of changes experienced, it is important to also include the secondary or external perspectives of community stakeholders. By being one-step removed from E Tū Whānau, they will be able to provide either a birds-eye view of community changes that have taken place, or will be able to share unique insights, given their particular role in the community (for example, from a policing or social work perspective). They may highlight changes that are not as easily seen from other perspectives.



Learning

When we looked at the changes identified by participants in each community, we saw notable differences in what was reported depending on whether the conversations had been with whānau, kaimahi or community stakeholders. This confirmed for us the value of including participants from these different groups. It meant that the full scale of a change for whānau and the community was better understood.

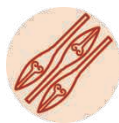
Participants should have enough experience of E Tū Whānau that they can reflect on the impact it has had for themselves and / or their community – to be able to talk about change. This level of experience may depend on how E Tū Whānau has unfolded in each

community. The impacts of more intense activities, such as wānanga-based work, may be different to those, such as community days, where relationships are built over time and the impacts may take many months to see.



Suggestion

We suggest inviting the participation of people in the research who have been engaged with E Tū Whānau for at least a couple of months, and preferably over a longer period so that there has been time for them to experience and reflect on changes that have since taken place.



Learning

After participating in E Tū Whānau Tikanga Rangahau, one community shared a key learning that they had taken on for their organisation. This was that evaluation activity does not have to happen immediately after an event. Instead, and depending on the activity, it may be better to wait for some time to pass to give space for reflection and for impact to be had.

This learning was inspired by the changes that took place for participants, not immediately but some months after their engagement in focused E Tū Whānau activity. The important changes that they described through E Tū Whānau Tikanga Rangahau would not have surfaced for them if we had met with them soon after their E Tū Whānau experience.

We thought this an important learning to share, especially as participants across different communities also told us that some of the changes they had made and could now see would not have been seen or seemed so important to them without the passage of time.



Ethical consideration

For the pilot, we chose not to engage with participants under 16 years of age as this would have needed additional parental or guardian consent processes. Communities will need to get the consent of parents or guardians if their research is with tamariki who are younger than 16. We would also suggest that the research team includes someone experienced in effectively engaging with this age group and who is sensitive to their needs.

Number of participants

The number of participants to aim for will depend on the size of the community and number of people who have been engaged in E Tū Whānau activities. Too few participants will not give enough understanding of the different changes that have taken place or understanding of the changes that have been experienced more often than others. Too many participants could mean a long research process with too much information and data to sort and make sense of.

In piloting the process with three E Tū Whānau communities of different sizes, we found for a smaller community, with relatively small numbers that had been engaged in very specific E Tū Whānau activity, around 20 participants to be a good number. In a larger community

spread across several locations, we found that around 30 participants was an appropriate number.

Location

If an E Tū Whānau community has different rōpū, or is based across different regions, a decision will need to be made about whether the rangahau is to be focused with particular rōpū or is to occur across rōpū and / or regions.

It may be harder to organise the work across different locations and rōpū, and it may take more time or cost more, but it might also help to provide a wider perspective on E Tū Whānau and to understand its full and different impact(s).

Step 2: Planning for E Tū Whānau Tikanga Rangahau

Rangahau planning hui

Having a series of planning hui is important for supporting an understanding of the rangahau and to plan how it will take shape. The focus of the initial hui will depend on the nature of the existing relationships between the community and those who will be carrying out the research for or within the community, and their understanding of the community's E Tū Whānau journey.

The research leads for the piloting of the rangahau process were new to each of the three communities. As such, we found that about four planning hui were needed. Ideally these might take place over a few weeks though for the piloting, the hui took place over a few months due to people's different availability, the busy schedules of communities and the ups and downs of COVID-19.

In our experience, the first two hui focused on:

- creating the building blocks of trust and relationships between the researchers and the community
- understanding the community's E Tū Whānau journey and experiences of E Tū Whānau, their E Tū Whānau aspirations, and what E Tū Whānau looks like in the community
- supporting the community's understanding of the rangahau – its whakapapa and purpose, and what will be needed for the rangahau to take place, including broad consideration of:
 - how the guided conversations could take place
 - general timeframes
 - what the community needs to participate confidently
 - the different types of participants to select to ensure representative perspectives of E Tū Whānau in each community
 - what will work practically to best support the planning and field research.

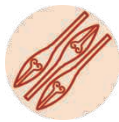
Drafting a research plan

We found that it worked well to develop and share a draft high-level plan for the research with the community after the second hui. This included suggested dates for when the guided conversations might take place. This was to guide and help the community to consider what the rangahau might look like practically. To support this focus, we included key information discussed at hui such as participant numbers and the types of participants to aim for.

We drafted the plan so that it was not seen as fixed but rather as a guide that could then be built on, changed and shaped to suit what would work for the community.

With a draft plan, those responsible for the research in the community may then feel more ready to begin identifying potential participants in the research and will be able to consider what timeframes will work for everyone.

Appendix B provides an example of an initial draft plan that was proposed for Mōkai Pātea. That plan ended up being changed quite a lot following the decision to complete the guided conversations by Zoom and not in-person, and after shaping the plan with the community.



Learning

In piloting the rangahau, the project team had not initially planned for four hui but now, having experienced the process across three communities, this number seems to be about right. This was because the research team had not come from the community and time was needed to understand the community's E Tū Whānau journey and for the rangahau to be properly considered, understood and planned for. The need to hui by Zoom and establish relationships that way also made a series of hui important.

The research team were reluctant to direct the process as they wanted kahukura or those overseeing the research in each community to feel able to shape the fieldwork process once they understood the key foundations of it. However, the experience from the piloting was that the communities wanted specific direction about how and when the rangahau might take place. Communities are experts in and busy with their day-to-day mahi. They want guidance and direction from those with the research expertise and do not necessarily want to be burdened with the extra time of co-planning. Of course, this will depend on the individual community.

Later hui and planning can focus on developing and bringing the research plan to life. Key areas for consideration include identifying the following:

- a list of people to invite to participate
- likely timeframes for the guided conversations
- the best way to engage with potential participants to introduce the research, invite their participation and continue the engagement leading up to and after the guided conversations
- the best information and support the research team can provide leading up to the guided conversations and supporting the community to feel confident to participate
- how participants will be supported if concerns arise about their wellbeing during the guided conversations
- the role and presence of support people if participants wish to have someone with them for support during the guided conversations (the participants should feel that they can be free and open with their kōrero in choosing their support person)
- the venue(s) where the guided conversations will take place, including for online conversations, and how to ensure easy access to technology and privacy
- what the koha will be and how this will be given
- what the process will be for scheduling the conversations.

The initial engagement to invite people's participation in the research and the ongoing engagement is probably best done by someone who is known to them and has a good understanding of the research. This may help the potential participant to feel safer about the

research and to make sure they have all the information they need to inform their decision about whether to participate. At the same time, it is important that they do not feel obliged to participate. There may also be opportunities through upcoming community hui, wānanga or events to introduce and invite interest in the research more broadly.

For the pilot, one of the communities, Mōkai Pātea, used the draft plan and space between the third and next hui to wānanga internally to develop the research plan. This included their identification of potential participants to invite and who and how they would do this. This information was shared with the research team and formed the basis for discussion at the next hui. By the time of the fourth hui, a number of participants had already been approached by Mōkai Pātea and had indicated that they would take part.



Insight

Taking time out to wānanga internally about potential participants, based on the information provided in the first draft plan, was an excellent process that gave Mōkai Pātea collective space and thought to plan the way forward and invite participation in a timely way. The decision of Mōkai Pātea to allocate key kaimahi to engage with potential participants and the research team to schedule the guided conversations led to an effective process.

Where an E Tū Whānau community has more than one rūpū or is based across different locations, we suggest that the kahukura from each participating rūpū / location be part of the planning hui to gain a first-hand understanding of the rangahau whakapapa, purpose and process, and to support their subsequent planning for the rangahau to take place.

It is important that kahukura have a full understanding of the rangahau process. This supports their own participation and informs their invitations to participants, ensuring those they invite will provide representative perspectives of E Tū Whānau in their communities overall. It also supports them to provide full information to community members about participating in the research. Kahukura will have key roles organising the rangahau to take place in their communities. How well they understand the process will go on to affect how effectively the rangahau process is set up and takes place.



Insight

The piloting of the process with CART included different kahukura and the organisation of the rangahau by kahukura in different locations. CART invited the research team to first meet with the kahukura in one location and to engage them in individual guided conversations before they arranged for the research team to carry out the guided conversations in their communities. This gave kahukura first-hand understanding of the process. It was a great way to support their understanding of the rangahau before they went on to engage with whānau about it and plan for the guided conversations to take place in their communities. This led to an excellent process with a good number of participants able to reflect on the changes they had experienced through E Tū Whānau.

In-person, kanohi ki te kanohi guided conversations can be held with an individual or with more than one person, in pairs or in mini or whānau groups. Much depends on what the participants would like, what they feel more comfortable with and after taking account of

logistical matters. For example, group conversations will take longer and the kōrero shared will be heard by others, creating different privacy considerations.

Benefits of having more than one participant include that:

- people may feel safer or more comfortable participating with others
- it may be more natural for a couple, for example, to talk together about changes they have experienced
- the shared discussion that can take place in a group may better-help people to identify and reflect on changes that have been seen or experienced.

The guided conversations have not been designed to take place in a wānanga context. This is because the rangahau process was designed to only require a short time commitment from participants.

By contrast, wānanga would likely require much more time and engagement to understand each individual's different changes because of E Tū Whānau. Privacy and confidentiality assurances could also not be given.

Through the piloting, we saw the importance to the process of the intimacy and privacy that the individual and pair conversations gave. For many who participated, this supported the open and raw personal reflections and experiences that took place, including some conversations that covered kōrero about personal, family, whānau, community and workplace experiences. Also, stakeholders, kahukura and kaimahi could speak freely about changes they had seen in others in the community.

In using Zoom, we held the conversations with one person at a time because of the possible challenges that could happen with technology and to better give time and space to build a connection with each participant. For the same reasons we held conversations with one participant at a time where these took place by phone.

Where the guided conversations take place

In-person guided conversations work well in spaces that are familiar, relevant and central to participants, for example, a community youth centre that has a separate private room where the conversations can take place. We found that a larger space, along with a private space, works well where the community has arranged for participants to come together to meet the research team, hear more about the research and for kai. The conversations can then take place in the private space.

Offering a couple of appropriate venues for participants and the researchers to come together may also be preferred to give participants some choice over the venue. Offering choice is also possible if the guided conversations are conducted through Zoom.

For the pilot, Zoom conversations were held with all Mōkai Pātea participants. Mōkai Pātea made its whānau room at Mōkai Pātea Services available for participants to use. This gave participants access to a reliable internet connection and an appropriate device to access Zoom.

It provided participants a private space where their kōrero would not be overheard or interrupted. Mōkai Pātea also offered to take a device to participant's homes if they preferred to participate in the guided conversation from their own space.



Insight

The options Mōkai Pātea offered worked well. The technology worked well. Most participants chose to participate from Mōkai Pātea Services. This meant that they had easy access to what was needed. Mōkai Pātea started the Zoom meeting for each participant and made sure that there was good sound and visual quality. They provided participants hard copies of the Informed Consent form and Information Sheet.

Conversations by telephone can also be an option if participants prefer, including if they are limited by connection to internet or appropriate devices.

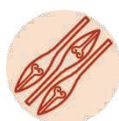
In all cases, it is important that the guided conversations take place in a way that keeps the conversations private and where participants feel comfortable and safe.

Holding the guided conversations at community events

It may seem like a great idea to hold the research conversations at a community event, especially as it seems like less burden for communities due to less organisation time. Potential participants would already be at the event and not have to make extra arrangements to participate in the research. However, there are challenges to this.

As the community event will most likely be participants' main focus, the guided conversations become a lesser focus and need to happen around peoples' engagement in the event. Events are also time limited. This means that there will only be a short time available for each guided conversation to take place, unless time and space has been arranged for conversations to take place before or after the event. At each of the three events attended for the piloting, there was only time for two conversations to take place. The challenge of participants having limited time is also added to, where participants have not yet had the research explained to them and time is needed for this, as well as to go fully through the informed consent document (if not provided in advance).

Other challenges can include finding an appropriate private and quiet space for the conversations to take place if not pre-arranged.



Learning

During the piloting, the researchers attended three community events to carry out guided conversations. While this seemed like a good option, in practice we found that the process was less effective when carried out at community events. Key challenges were the limited time available for the conversations, the conversations were not a main focus for participants, and they had been loosely arranged, taking place 'on the hop' without a specific time or space pre-arranged.

Holding the conversations at a community event could work, but we think some key ingredients would be for time to be set aside before and / or after the event for each conversation to take place (and for these to be pre-arranged with participants), a private and quiet space to be made available, and participants to be provided the Information Sheet and Informed Consent form before the event.

If you have a project advisor or advisory group, it would be useful to share the intended research plan and approach with them at this point and before arranging the conversations so that they can share any advice or thoughts on the arrangements proposed.

Step 3: Inviting participation and scheduling the conversations

The next step in the process is to contact potential participants to introduce and explain the research to them and to invite their participation.

For the piloting of the rangahau process, it was mostly the E Tū Whānau fund-holder, kaimahi or kahukura who undertook this role. This worked well as they had established relationships with the potential participants, had good information about the rangahau and knew the best way to communicate this information to each person.

Inviting participation

We suggest providing the Information Sheet and Informed Consent form to potential participants after first discussing the research with them. They can then take the time to think about what they have heard and read about the research before deciding if they want to take part.

Encourage potential participants to ask any questions about the research at any stage, including contacting the research team whose details will be in the Information Sheet.

As people agree to participate in the research, arrange a date and time with them for the guided conversation to take place, using the dates and times that the research team and community have earlier agreed together. This may happen a little bit differently depending on whether the conversations are going to take place in-person, by Zoom or phone.

For the piloting of E Tū Whānau Tikanga Rangahau, because it was decided that all the guided conversations for Mōkai Pātea would take place by Zoom, it was possible to offer a wide window of time in which to schedule the conversations.

The research team provided Mōkai Pātea with a calendar of researcher availability over a two-month period. The calendar was a live document that could be edited in real time by both the research team and Mōkai Pātea as availability changed and as participant conversations were scheduled. Appendix C provides an example of the calendar.

For in-person conversations where the research team travelled to different communities, the conversations needed to be scheduled for the week that the researchers would be in the relevant community.

We found that Zoom made it much easier to reschedule conversations if needed. However, in practice, if the researchers are based within the community, there may be much more flexibility with arranging and rescheduling in-person conversations.

If there is a need to reschedule conversations, try and arrange a new time and date as soon as possible to keep momentum going and everything on track. Some creativity and a bit of flexibility may be needed, such as holding the conversation by Zoom or phone, rather than in-person as planned, or meeting at a different venue or location.

If, as the conversations are scheduled or completed, it becomes apparent that there may be a gap in the representativeness of participants, this should be discussed with the community to see if additional participants can be invited. Researchers may be able to assist by offering to support the community to approach additional participants and by offering flexibility with

how the additional conversations might be conducted, such as with the mode or date and time these take place.

Scheduling the conversations

Most likely you will be scheduling more than one conversation to take place each day and will need to work out how much time to allow for each conversation and the maximum number of conversations to hold in one day. We suggest allowing a minimum of two hours for conversations and holding no more than four each day.

As part of the piloting process, a minimum of one hour, and typically 1.5 hours, was scheduled for conversations. Mostly this was an efficient use of time and worked well. However, overall, the conversations took longer than originally anticipated with several lasting around 1.5 hours. This left no space between some conversations, and in one case a conversation needed to be rescheduled because the earlier one went over time.

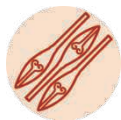
With Mōkai Pātea, where all of the conversations were by Zoom, a maximum of two guided conversations were scheduled per day. This provided a relaxed pace for the conversations to be completed and greater flexibility around timing and scheduling.

For in-person conversations, the time that the researchers have in each community will shape the number of conversations held each day, as will factors such as whether a conversation is with more than one person, which will take longer. For the piloting of E Tū Whānau Tikanga Rangahau, we spent two to three days in each location and held a maximum of five guided conversations on one given day. This was doable because three of the conversations were each one hour or less. But it would have been challenging if the conversations ran for longer.



Suggestion

Consider scheduling no more than four conversations per day to avoid fatigue and overload. If a minimum of two hours is allocated for a conversation to run, this will help to make sure that enough time is allocated.



Learning

Our learning has been to allow a minimum of two hours for conversations.

Step 4: Preparing for the guided conversations

Researcher team training / preparation

Once the guided conversations have been scheduled, the research team can come together to prepare and plan for the upcoming fieldwork. This gives the opportunity to work through potential challenges that may be experienced in the field and any concerns and questions the team has. It also provides the opportunity to make sure the team is on the same page about logistical matters such as which karakia to use, the different roles of the team and how notes will be taken and kōrero recorded.

Organising the kapu tī, goodies, kai, koha, thank you cards

Where appropriate, the research team organises kai, tea, coffee, and other goodies to take to the guided conversations to support manaakitanga and reciprocity.

A dilemma around holding the guided conversations through Zoom or over the phone is how to bring along those biscuits and offer a kapu tī to manaaki participants. One option is to arrange a kapu tī pack (with a few extra goodies) for the community to provide to the participants. As part of the piloting and planning for the Zoom conversations, the research team provided Mōkai Pātea with the goodies we wanted to go to participants.

This also included participant koha (supermarket and petrol vouchers) and thank you cards for each participant. The research team can also send these directly to participants if preferred.



A koha pack put together by Mōkai Pātea who also added a few of their own goodies

Koha acknowledges the contribution and knowledge generation of participation. It is therefore good practice to make sure that there is enough koha for all participants, even if the community has indicated that there is not an expectation of koha for some of the participants (e.g. kaimahi or community stakeholders).

Thank you cards for each participant can provide a personal expression of appreciation, especially when in-person engagement is lost through using Zoom.

Organising Zoom meeting links

For our piloting of the guided conversations through Zoom, one of the researchers organised and sent Zoom meeting links for each guided conversation either to Mōkai Pātea if the participant was using their venue, or otherwise directly to the participant. It was useful for the research team to take responsibility for this as it meant that they hosted the conversations and could easily reschedule the meeting links if needed.

Pre-providing the Informed Consent forms

As mentioned, it is better if the Informed Consent form is provided to participants before the guided conversations take place. While the researchers will go through the form with each participant before the conversations starts, providing it beforehand will give the participant the chance to go through it in their own time and space.

Step 5: Holding the guided conversations

Participating in research can be scary and nerve wracking. Keep focused on making this an easy, comfortable experience for participants all the way through. Show people that you value their participation and their kōrero. Make this a safe and positive space for them to share about the changes they have experienced or seen.

There are some key steps that need to be gone through and which can make the process seem a bit formal at times, particularly the informed consent. However, people will feel comfortable with each stage of the process if carried out genuinely and as naturally as possible and by explaining each step as you go.

Keep in mind that the guided conversation process should:

- ensure participants understand what they are participating in and are fully informed about how their information will be used
- make sure that participants feel comfortable that it is safe to share their kōrero and that their kōrero is valued
- succinctly capture each change participants have experienced as linked to E Tū Whānau.

Be guided by the practices and qualities identified by Professor Linda Tuhiwai Smith⁵, for example, Aroha ki te tangata (respect for people) and Manaaki ki te tangata (share and host people, be generous).

Karakia

Opening the guided conversations with karakia will keep everyone safe as they move into the research space⁶. These can either be given by a member of the research team, participants or kahukura, depending on what is most appropriate in the particular situation.

During the piloting process, one of the research team usually gave the karakia when interacting with the participant without the presence of kahukura from the community. If the research team were introduced to the community by kahukura, then karakia was given as part of this by the kahukura. With TROTAK, some of the guided conversations were with tāne from a whaikōrero rūpū and they were invited to give the karakia.

“I think it helped that you guys introduced yourselves. It made me feel comfortable. Karakia also helps as well. Just carry on. It probably does help if you explain a little bit about yourself. Introducing something about yourself made me feel comfortable.” (Mōkai Pātea participant)

⁵ Refer page 6 above.

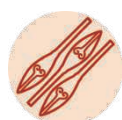
⁶ Katoa Ltd: Cram, F. (2013). *He Rangahau Kaupapa Māori: A guide to undertaking a Kaupapa Māori research project*. Auckland: Katoa Ltd: <https://www.katoa.net.nz/kaupapa-maori/beginning-a-research-project>

Whakawhanaungatanga: Introducing the research and researchers

Time should be spent at the beginning for the researchers to introduce themselves and the research and explain what to expect during the guided conversation process. This enables the researchers to share things about themselves and for connections to be made with the participant (whakapapa connections, connections to the community, E Tū Whānau or the project). Taking time for this will show participants that we want to make connections to one another and may help them feel more comfortable about taking time to introduce themselves. This will help to ease into the research process where personal experiences will be shared.

Given the physical distance created by Zoom, we found it became even more important to take the time for introductions and connections to be made.

Explain to participants the need to go through the informed consent process after which then the intention is to hand over to them to introduce and share a bit about themselves.



Learning

Early on during the piloting of E Tū Whānau Tikanga Rangahau, the researchers increased their focus and time spent on introductions, including spending more time sharing about themselves as people (for example, their family, personal experiences, things going on in their lives). This followed a suggestion from one participant for more time on whanaungatanga when we asked for feedback at the end of their guided conversation. By doing this we felt it gave participants more of an opening and encouragement to spend time on this themselves.

Ensuring informed consent

Participants might be familiar with the Informed Consent form if it has been provided to them earlier. If the participant has already signed and returned the consent form, less time will be needed to go through it together verbally. A verbal consent process is also fine, so long as all parts of the informed consent form are discussed with the participant and that they agree to participate with a full understanding of all parts of the informed consent.

Either way, it is important to discuss the consent form with the participants, to answer any questions and to make sure they understand all the key implications.

Check whether participants agree to the conversations being audio-recorded and whether they would like to receive a copy of the notes, audio recording and / or summary report at the end of the process.

Ask participants what they would like to happen with their audio recording and the notes from their conversation. Provide them with choices such as having a copy returned to them or deleted or establish whether they are happy with their kōrero being kept for two years. They may also like a summary of the final community report. Ask for their preferred contact details if they would like the recordings, notes or reports emailed or posted to them. Sometimes participants who want their audio recording returned may just provide their postal address. If so, check to see if they also have an email address as this will make it easier to provide their recording. If not, discuss the option of posting them a USB flash drive containing the recording.

Participants' responses to options selected within the Informed Consent form should be recorded by the researchers on the consent form. Also, record the participant's confirmation of consent. Any questions or concerns raised should be noted and fully responded to. The Informed Consent form will be stored separately from any notes and recordings that are taken from the participant's guided conversation.

If participants are happy for an audio recording to be made, remember to press record. It is easy to forget as we get carried away with the kōrero.

For the piloting of the rangahau process using Zoom, the researchers chose to audio record on their cell phones (deleting these once the recordings were transferred to the researcher's shared drive) rather than using the record function in Zoom. This is because Zoom records both audio and visual images. We considered that participants would feel more comfortable with just an audio recording.



Suggestion

If both researchers record, this gives a back-up if any issues arise with one of the recordings.

Remember to remind the participants that they can stop the conversation at any time.

Participant introductions

Return to introductions, giving the participant time, space and encouragement to introduce and share about themselves before easing them into the guided conversation questions.

Facilitating the kōrero

There are slightly different questions for whānau / individual participants, community stakeholders and kahukura participants. For example, not only are kahukura asked about changes for their whānau, they are also asked about changes they have seen in their community. The questions to work through with participants are on the next page.

Table 1: Different questions for whānau and / or individuals, community stakeholders and kahukura participants

For whānau and / or individuals
Tell us about your involvement with E Tū Whānau. How did you become engaged in the E Tū Whānau kaupapa (the E Tū Whānau values, activities etc)?
What changes have you noticed in your whānau or in the community as result of E Tū Whānau?
You mentioned X before, do you think it should be added to this list?
For kahukura (or kaimahi)
<i>Ask questions above, add the following for kahukura (kaimahi):</i>
Now I am going to ask for your thoughts on the community, things that you might have seen as a kahukura (or kaimahi)
What changes have you noticed in the community as result of E Tū Whānau?
For community stakeholders
What was the community like before E Tū Whānau?
What is the community like now?
What changes have you noticed in the community as result of E Tū Whānau?
You mentioned X before, do you think it should be added to this list?

The opening question is designed as a warm-up to ease the participants into the kōrero and to help them to start thinking about their experiences through E Tū Whānau. Through this question, participants may mention some key changes or themes that they do not later refer to. If that happens, come back to these later in the conversation to see if they prompt discussion about other changes.

Sometimes there may be a need to use prompts, such as reference to the E Tū Whānau values, activities, kaimahi or kahukura if participants are not familiar with E Tū Whānau by name (depending on how E Tū Whānau may have been implemented in their communities or experiences).

Participants are then asked to name the changes they have seen and / or experienced because of E Tū Whānau.

One researcher will guide the conversation based on these questions and by keeping the participant on track, focusing on the changes experienced as related to E Tū Whānau.

Recording the kōrero

As this kōrero is happening, the other researcher will note down each change named by the participant in a table, along with relevant parts of the participant's associated kōrero for each change. A suggested table format for recording changes is in Appendix D.

If more than one person participates in the guided conversation, it is important that the notes show which participant identified each change. A simple way to do this is to give each participant a letter, such as 'A' for one person and 'B' for the other. The person recording each change would then write the relevant letter next to each change to show who said it. Both 'A' and 'B' would be written down if participants named, experienced or spoke about the change together.

The skill of the note-taker is to identify and succinctly record each specific change named by the participant, often from a rich and sometimes lengthy kōrero. Typically, this will involve screening out much of the conversation to describe the change in a few words or sentences, while also making sure enough of the participant's words and contexts described are recorded to accurately capture and make sense of the change.

It is important that each change identified by the participant is recorded individually, clearly and succinctly. This can be helped by stating or summarising each change in no more than three sentences. Try and make sure that each change is written down separately. It gets hard later, when going back to the notes to pull out the different changes if several have been recorded together.

At the same time, it is important to capture people's own words, including the contexts and parts of the story they have shared.

Conversations are primarily focused on capturing each specific change named by participants as linked to E Tū Whānau. To do this, it will be common for participants to also share related contextual information, wider information and experiences that extend beyond E Tū Whānau. It is important to provide the space for this as it is a natural part of the reflection and sharing process.

The challenge for the researcher recording the changes is to succinctly capture each change while also achieving a balance of capturing enough narrative to give meaning to the change without 'losing' each change in a large amount of narrative. Active listening is a key requirement.

Keep at the forefront of your focus 'what is the change being described that has happened through E Tū Whānau'?

Later in the process, one of the research team, who may not have been involved in every conversation, will go back through all of the notes taken from each conversation and assign each change to different pre-determined change categories. This can involve up to 30 sets of notes and multiple changes per participant. To do this well, the researcher will need to be able to understand and make sense of each change from a few sentences easily and accurately. Therefore, including participant's own words and contextual information is invaluable.

When later reporting the findings to the community, it is worthwhile to reflect back people's own words to help understand and bring to life the changes. This can be through

anonymised quotes rather than just stating the change and reporting numbers and percentages which can be a bit dry.

We found through piloting E Tū Whānau Tikanga Rangahau that participants valued having each of their changes read back to them in their own words. This also helped to make sure that we had correctly recorded and understood each change.

Authenticating the named changes

Once the participant has completed identifying their changes, the researcher who recorded the participant's changes will read back each change and the associated kōrero to the participant. If Zoom is used, the table of notes can be screen-shared so the participant can also read the changes and kōrero that have been captured. When the notes and / or kōrero are read back to the participant, be prepared for them to add or make changes. The researchers and participant need to work together to make sure the changes are clearly and correctly recorded in the participant's own words.



Insight

The process of screen-sharing and / or reading back the changes in participants' own words is of value for several reasons:

- It helps to make sure that the changes are captured correctly, according to the participant's own experience and words, and provides the opportunity for the participant to amend or add to the changes as they are read back.
- We found that it was empowering for participants to see, hear and reflect on the changes; several commented on how far they had come and how proud they were of this.
- Taking time to see / hear and review the changes may help participants to recall other changes that they had not yet identified.

Participants confirmed the usefulness of the process:

“Screen sharing has been great. Been good to have been talking but actually seeing what’s put up straight-off and being able to go back through and review it has been good. I’m just thankful to be part of it.”

“I’ve never had it replayed to me. It’s nice to hear, like I was there, now I’m here...I really enjoyed talking to you today... You guys do a beautiful job. Just beautiful. Simple process. Simple and effective.”

“I’ve been quite relaxed. You guys are comfortable to be around. I know there’s all the confidentiality stuff. This has made me realise what E Tū Whānau did and some of the stuff it did for me and without knowing that have actually put all this stuff to use unknowingly. You guys have been great. I could sit here for another hour and talk to you guys.”

A further validation of the process was that the participant who shared the last quote (above) later asked to receive a copy of the notes from their guided conversation after initially indicating that they did not want a copy.

Asking participants for demographic information

At the end of the conversation ask participants if they are comfortable to share their age, ethnicity and gender. This is information to collect for the purposes of data analysis (discussed in Step 7 of this kete) and to help to understand the community profile of participation in the E Tū Whānau research. We suggest asking for this information at the end rather than the beginning of the process as participants will then have had a first-hand understanding of the research. They will also know who the researchers are and feel more comfortable about deciding whether to share this personal information. Record this information separately from the notes taken from the conversation so that there is no identifying information in the notes.

Asking participants about future participation

The community may wish to use E Tū Whānau Tikanga Rangahau again in the future, with the same participants using the same questions to explore continued change over time. To support this possibility, participants could be asked whether they would be comfortable with their contact details being securely kept for this purpose. Participants' response to this could be recorded in the separate master list containing participant details (referred to in Step 6).

Bringing the guided conversation to a close

At the end of each guided conversation, thank the participants for all they have shared and explain the next steps for the rangahau.

Check if they have any further questions, such as what will happen with their information. It is worth double-checking participants' earlier indication about whether they wanted the recording and notes from the conversation and the summary report. They may reconsider, having experienced the process.

This is also a good time to provide koha to participants in appreciation of their knowledge generation and contribution. The conversation can then be closed with a karakia to provide a safe end to the research space⁷.



Suggestion

Learnings are always happening as the fieldwork takes place. It is a good idea for the research team to take the time for a cup of tea and debrief at the end of the first day of the guided conversations to talk about how things have gone and to pause and consider whether it may be a good idea to make any changes for a smoother process.

As the fieldwork continues, it is also useful to debrief at the end of each day of conversations to talk about the changes that have been shared and emerging themes.

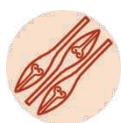
Doing this together as a research team will give the opportunity to share and reflect on the changes described, while keeping this in the confines of the research team and keeping participants' information private.

⁷ See note 6.

Reflections and learnings from the piloting

Length of the guided conversations

Across each of the three communities involved in the piloting of E Tū Whānau Tikanga Rangahau, the guided conversations typically took around 55 minutes to one hour 15 minutes. The shortest conversation took about 20 minutes and the longest, two and a quarter hours. The time taken depends on things such as how many people participate in the conversation, how much the participants wish to share, how much involvement they have had in E Tū Whānau, the number of changes shared and the time the participants have available. It also includes the time taken to go through the Informed Consent and for the introductions at the beginning – which can also vary in time.



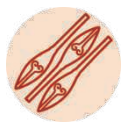
Learning

It was initially expected that the guided conversations would take between 30 minutes to one hour. However, many took longer than this. Therefore, it is good to plan for 1.5 hours and to allow at least two hours for conversations.

Sometimes the conversations may take longer if participants continue to share about their contexts and experiences but not their changes. At that point, the conversation no longer becomes a guided conversation for the research purposes but is still the participant's story. The question for the researchers is whether to keep the kōrero open so it continues in this way or to bring it to a close.

For the piloting, the researchers chose to keep the kōrero open. They considered it appropriate to do so, especially as participants chose to share their personal stories. However, in one case this meant that the conversation ran into the time scheduled for the next person. Luckily, the next participant was willing to reschedule, taking the view that it was important for people to have their time.

In a group conversation, this will be even more important to manage so as to respect the time and contribution of all participants and because, with greater numbers, it may be more commonly experienced.

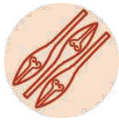


Learning

Where kōrero continues but is not in response to the research questions, a learning is to leave the conversation to continue but not let it delay the next scheduled conversation or other participants. In such cases, we suggest guiding the participant back to reflect on any changes experienced or observed, and to begin to draw the conversation to an end in time for the next guided conversation, explaining this need to the participant.

Using Zoom or technology platforms

Prior to COVID-19 consideration had not been given to the guided conversations taking place by Zoom. At first, this was not a favoured option. Of course, Zoom can never replace in-person, kanohi ki te kanohi engagement but it can and did work well during the piloting.



Learning

Holding the guided conversations through Zoom provided several benefits.

With COVID-19 related restrictions, in-person conversations were not possible. Through Zoom, the guided conversations were able to go ahead to planned timeframes and without leaving things in limbo.

Zoom removed concerns about or the risk of ill-health through spread of viruses and illness, particularly for people with existing health conditions.

There was a high level of flexibility about when the conversations took place. The conversations could be scheduled over several weeks and fitted into everyone's availability. The guided conversations occurred on an ongoing basis but without being rushed or jammed into tight timeframes.

It was easy to reschedule conversations if needed.

When using Zoom, key considerations are that the participant:

- can speak safely and privately (as needed) and has time and space available for the conversation. This may be supported by being in a soundproof room or wearing headphones
- has access to sufficient technology and wi-fi capability.

The ability of individuals to be on their own device (as opposed to sharing with another) improves the technological quality of the Zoom communication.

Step 6: Saving and storing audio recordings and notes

It is very important that the information from people's guided conversations (data) is stored in a different place to any of their identifying details. To protect the confidentiality of participant data, any information that identifies the participant (their name, age, and gender) should not be linked to the responses they give during the guided conversations. This can also include details such as the time and date of the conversation, the order of the guided conversations (for example being the third on day one) and details in their kōrero. The aim is that others cannot know whether a person participated or guess who the person is from the information later produced in the final report.

To protect participant privacy, we gave everyone a unique identifier such as XYZ003. We then used this unique identifier rather than the person's name when recording or referencing their data. One of the research team should hold a master list that shows the unique identifier given to each participant. As this list identifies each participant, it should be saved securely and separately from any of the project information. We have attached an example of a master list in Appendix E.

All audio recordings and participant notes should be saved and stored without reference to the participant's name or other identifying details. Instead, put the participant's unique identifier number on all of this, to make sure you can keep track of whose data it is while maintaining the participant's privacy.

The Informed Consent forms should never be linked to the data from participant's conversations. All information should be stored securely and be password protected.

Later in the process, when going back through all the notes from the conversations and lifting the data into an Excel spreadsheet (described in Step 7 below), care needs to be taken to make sure that participants are not identifiable from the information collected. Particular activities, stories, descriptions or characteristics might be specific to an individual in a community. For example, if someone is the coach of a soccer team then that information should be taken out of the notes because someone may be able to identify who that person is in the data.

Step 7: Coding participants' changes

At this point in the process, you may have up to 30 sets of notes, recording people's different changes and kōrero. It is important to easily understand the different changes that have been experienced or seen by these participants across the community and to work out how often these different changes have been experienced (their frequency).

Because the data from the guided conversations (the changes participants described) are based on people's words and kōrero (qualitative data), this data needs to be summarised and categorised. This is to identify key findings from across all the guided conversations and the frequency with which the different changes appear (quantifying the data).

Background and resources to use

The process involved is called *coding the data*. In summary, this means lifting each change from each participant's notes and then categorising and summarising it, using codes from a coding table and then recording this information into an Excel spreadsheet.

The key resources to use for this stage of the process are:

- the notes from each of the guided conversations
- the table of codes that we have refined for this process (see below)
- the Excel spreadsheet template that we have provided to record the coding process.

Table 2: Codes to categorise participants' kōrero

The table below provides numbers (codes) and descriptors for key change categories and related themes that sit under each category (indicators). These will be used to categorise and summarise the changes participants have described.

	KŌRERO AWHI
1.1	Whānau work on their relationships (establishing new relationships with whānau; re-establishing relationships; general improvements)
1.2	Whānau use loving, caring language and interactions as a norm; are able to show feelings and emotions
1.3	Whānau improve communications between whānau members
1.4	Whānau spend more (quality) time together
1.5	Whānau celebrate their successes and family occasions
	SUPPORTING ONE ANOTHER
2.1	Whānau feel supported / awhi'd by whānau (including when mistakes are made)
2.2	Whānau have established shared roles and responsibilities in the home
2.3	Whānau participate in discussions; sharing views, including dissenting views
2.4	Whānau work through problems, challenges and hard times together

2.5	There are whānau and friends to turn to and rely on if times get tough
	GETTING THROUGH CONFLICT TOGETHER
3.1	Whānau have strategies for anger and conflict; report dealing better with anger and conflict
3.2	Whānau openly discuss family violence, understand acceptable behaviour and create expectations of non-violence
3.3	Decreased use and experience of aggressive behaviour and violence within whānau
3.4	Whānau feel safe in their own homes
3.5	Whānau have access to trusted mentors and support to help with conflict resolution; complete mentoring
	COMMUNITY PARTICIPATION
4.1	There are spaces and activities in the community that support whānau to connect, whānau participate in these spaces (General: sport is code 9.2; Māori cultural activities is code 10.5)
4.2	Whānau grow stronger relationships with others in the community
4.3	Whānau support whānau: community support is identified as having been provided to make positive change
4.4	Whānau contribute skills, expertise and knowledge to the community (volunteering, community projects), helping others
	COMMUNITY SUPPORT
5.1	Whānau have safe places to go in times of crisis and danger
5.2	Whānau have trusted, relevant services they can access (e.g. to support parenting, knowledge of child development, children's education, health, wellbeing)
5.3	Whānau proactively access support services when needed
5.4	Increased safety in the community; greater likelihood of taking action if aware of / witnessing violence (in community or whānau); holding offenders to account
	INTERGENERATIONAL PARTICIPATION
6.1	Whānau participate in children's extra-curricular activities (e.g. holiday programmes)
6.2	Rangatahi are actively participating in new, positive social interactions, activities
6.3	Rangatahi are exercising leadership in school and community; may act as role models
6.4	Kaumātua are supported to participate and engage in whānau / community life
	FUTURE, GROWTH FOCUSED
7.1	Whānau have a shared positive vision for the future; a change of mindset

7.2	Whānau have developed plans and goals; are progressing their plans / goals
7.3	Whānau growth in self-esteem; self-belief; confidence; a sense of capability and capacity
7.4	Whānau move into paid employment; obtain more stable, better employment; value employment
7.5	Whānau enrol / participate in further education or training (vocational, wānanga-based, tertiary, secondary levels); obtain qualifications
7.6	Whānau learn about, reflect on, and develop ways to process and move through trauma, intergenerational trauma, hara, and grief
	E TŪ WHĀNAU VALUES
8.1	Learning, valuing, practising, spreading E Tū Whānau values
	HAUORA
9.1	Improved hauora; good health is increasingly valued and nurtured among whānau
9.2	Whānau participate in sport and physical activities
9.3	Whānau reduce / stop using alcohol, drugs; engage with support
9.4	Whānau learn about, develop, and use techniques to support their own wellbeing
	TE AO MĀORI
10.1	Cultural (re)connection: feel connected to Māori identity, culture; pride in being Māori; value Māori culture; feel it is important to engage with Māori culture
10.2	Te reo: learning to speak te reo Māori, increases in ability, greater use of te reo
10.4	Participation in wānanga
10.5	Attendance or participation at marae, hapū, and iwi activities and events; other Māori cultural events and activities (e.g. waiata, kapa haka, mihi, karakia, Māori arts & crafts) [Note that 10.3 is now folded into this code]
10.6	Māori culture generally: engaged in learning, increased understanding about Māori identity, culture, te ao Māori, tikanga Māori, colonisation, and Māori history generally
10.7	Whakapapa: engaged in learning, increased understanding about one's own whakapapa, tūpuna, whenua, histories

Where did these codes, change categories and themes (indicators) come from?

As part of the project to pilot E Tū Whānau Tikanga Rangahau, we developed and refined the above code table. This table is special to E Tū Whānau research. It is based on a review of the findings from a large body of past community-based E Tū Whānau case-study research. This means the code categories and related change themes are research-based and are grounded in the experiences of E Tū Whānau communities.

During the piloting process, we checked the appropriateness of these indicators for E Tū Whānau Tikanga Rangahau and made refinements. We needed to add a few new indicators that participants had identified through the guided conversations but were not identified from earlier E Tū Whānau research. This is something that may occur if specific changes are unique to different E Tū Whānau communities. For example, from Mōkai Pātea data, the following new change indicator was created under the Category “Future, Growth Focused”:

7.6 Whānau learn about, reflect on, and develop ways to process and move through trauma, intergenerational trauma, hara, and grief.

The addition of this new indicator was necessary to recognise this as a frequent theme that appeared in the data.

Excel spreadsheet

Through E Tū Whānau Tikanga Rangahau, we have developed an Excel spreadsheet template for E Tū Whānau and E Tū Whānau communities to use to record the coding process. Please note, this contains example data for 1.1, 1.2 and 1.3 which you will need to replace with your own data. The spreadsheet can be accessed through the following link:

<https://etuwhanau.org.nz/rangahau/template>

Appendix F provides a step-by-step guide to using this template, describing the type of information to put into each column of the Excel spreadsheet for each participant.

Each row (line) of the Excel spreadsheet should contain one person’s data, although if more than one person was in the guided conversation, you could put all of the changes under one row (but you’ll still want to record the details of each participant’s age, gender and so on in the Excel spreadsheet against their unique identifier).

Carrying out the coding process

The coding process involves reading through the changes identified by each participant and figuring out which code in the code table relates to each change.

It can be best to print out a copy of the code table or have another computer screen open showing the code table. The idea is to read the change, and then work out the corresponding code(s). You then enter the code(s) into the Excel spreadsheet and this will form the basis for analysis and reporting.

Step 1: Getting familiar with the changes and code categories

Before starting the coding, it is important to read through all the data (the notes taken from the guided conversations) and become familiar with the codes in the code table. This will give a good basis for understanding what the data and codes look like before you start the process.

Step 2: Moving data from the notes to the Excel spreadsheet

The next step involves taking information from the notes of each guided conversation and adding this into the Excel spreadsheet. This part of the process is called *data cleaning* - getting the data ready for coding. It is important that you allow enough time and space for this as it can be quite an intense process. It is important to take extra care at this stage as mistakes can cause a lot of confusion later.

First, for each participant add the following information from their notes into each relevant column of the Excel spreadsheet:

- Column A: the participant's unique identifier
- Column B: the date and time that the guided conversation took place
- Column C: the names of the researchers
- Column D: the participant type (kahukura, stakeholder, individual)
- Column E: the participant's gender
- Column F: the participant's ethnicity
- Column G: the participant's age.

To prepare for the next stage, copy over each change from each participant's set of notes into the spreadsheet. Starting with the first participant, the first change will be entered into the column Change1.raw (this refers to the *raw* data, the actual change described). Their second named change will go into the column called Change2.raw, the third change will go into the column Change3.raw, and so on.

Once you have copied over each of the participant's changes into the spreadsheet, count the total number of changes that this person has named and put that number into the spreadsheet (in column H).

Step 3: Work out which code(s) corresponds to each change

Now that the changes have been copied over to the Excel spreadsheet, this next stage involves reading through each change and deciding which code or codes the change corresponds to from the code table.

For example, if the first change copied into the column Change1.raw is:

"Learnt more about whakapapa, learning more outside my own, can see the importance of whakapapa and can make connections with visiting manuhiri; can see it's a taonga."

This would correspond to the code category 10. Te ao Māori. The relevant code would be "10.7 Whakapapa: engaged in learning, increased understanding about one's own whakapapa, tūpuna, whenua, histories".

Therefore, you would enter code '10.7' into the column called 'Change1.code1', making the decision that the participant has explicitly talked about learning about whakapapa.

Any change can have more than one code. That is why the spreadsheet has more than one column available to record more than one code for each change.

Consider whether there are other codes in the code table relevant to each change. For example, in the change just described, the participant also mentioned making connections with visitors. Therefore, it would also be coded to "4.2 Whānau grow stronger relationships with others in the community". You would then add 4.2 to the column Change1.code2.

The next few columns (Change1.code3, Change1.code4 etc) give the opportunity to tie this change to other codes, if relevant.

If a change ends up only having the one code, then you would just use the Change1.code1 column and leave the remaining Change1.code... columns blank and move on to code the participant's next change.

You then carry out the same process for the second change identified by the participant (entered into the column called Change2.ra'), until the process has been completed for all of the changes identified by each participant.

Sometimes changes may be very long and contain multiple codes. This may mean that a change needs to be split up. For example, Change 1 may need to be split into Change 1 and Change 2 columns.



Suggestion

Use a large computer screen, if possible, even two screens. Save plenty of copies of your spreadsheet somewhere safe as you go just in case you need to go back to an earlier version – we all make mistakes, no matter how experienced we are at this.



Suggestion

Sometimes it may be hard to decide which code to use, especially because the individual codes group under and relate to common themes. Don't worry, this is not unusual. It may help to hold-off coding changes that you are struggling to code, highlight and go back to them after you have completed coding all other changes. Then, if you're still unsure, perhaps go back to the participant's audio-recording as this will enable you to hear the change and its context more fully, which should help with the coding.



Suggestion

Although the same people coding the same data should get the same or similar results, we recommend that for consistency only one person codes the data.

As communities undertake their own E Tū Whānau rangahau, they may need to create and add their own indicators to the code table, if changes identified do not relate to any of the indicators present. However, the breadth of the indicators and the rich whakapapa behind them should minimise this need. Care should be taken in adding new indicators, only doing so when it is not at all possible to broadly link the change to one of the existing indicators.



Suggestion

If needing to create new code indicators, try to word these as broadly as possible so that they can apply to different but related changes but also stay meaningful enough to accurately reflect what participants have described. This needs careful balancing. Describing a code indicator in a too narrow way can make it of limited use as only very specific changes can come within it. The aim is for the changes described in different ways by participants to be identified and linked to a key theme, but without distorting or losing the essence of each change.

Step 4: Identifying the frequency of each change

Once all the data has been entered into the Excel spreadsheet and the coding is complete, it will be possible to look across all the data to see the number of times the different change indicators appear from across all of the guided conversations.

The second tab of the example Excel spreadsheet is set up to automatically count the number of codes in each category and create a table of results and an overall graph for you.

The following table shows a partial example of what this data may end up looking like, using the first two change categories from the code table. The Count is the number of times participants identified changes that linked to the same category and change indicator. The percentage is the number of times these changes appeared compared against the total changes identified overall.

Table 3: A partial example of the code table with the change frequencies identified

Indicator Number	Indicator Name	Count	%
	KŌRERO AWHI	52	20.1
1.1	Whānau work on their relationships (establishing new relationships with whānau; re-establishing relationships; general improvements)	20	7.7
1.2	Whānau use loving, caring language and interactions as a norm; are able to show feelings and emotions	13	5.0
1.3	Whānau improve communications between whānau members	16	6.2
1.4	Whānau spend more (quality) time together	3	1.2
1.5	Whānau celebrate their successes and family occasions	0	0.0
	SUPPORTING ONE ANOTHER	14	5.4
2.1	Whānau feel supported / awahi'd by whānau (including when mistakes are made)	3	1.2
2.2	Whānau have established shared roles and responsibilities in the home	1	0.4
2.3	Whānau participate in discussions, sharing views, including dissenting views	3	1.2
2.4	Whānau work through problems, challenges, and hard times together	5	1.9
2.5	There are whānau and friends to turn to and rely on if times get tough	2	0.8

This makes it possible to identify the change indicators that appeared the most frequently across the community. From the above example, it can be seen that in one community, 52 of the changes mentioned (20.1%) related to Kōrero awahi.

Within this category, the change theme mentioned most frequently (20 times) related to the code "1.1 Whānau work on their relationships..." As such, this can be seen as a key change that has been experienced for a number of participants in this community because of E Tū Whānau.

Step 8: Presenting and reporting the findings

A summary report and / or presentation can be completed to share the findings from the coded data with the community and participants. This will show the different changes that the community has experienced because of E Tū Whānau and the frequency with which the different changes have been identified by all participants. This can include identifying those changes that have been most frequently experienced, as well as all the changes individually experienced.

As an example, the summary reports we completed for E Tū Whānau Tikanga Rangahau followed this format:

1. Project whakapapa and purpose
2. Information about what E Tū Whānau looks like in the community
3. Information about the process undertaken for the guided conversations: how, when and where the research took place, and the number and type of participants engaged
4. Changes most frequently identified, including the number of times each change appeared and quotes from participants to 'bring to life' each change
5. An appendix listing all the changes identified and the number of times each appeared.

The different changes and the frequency with which they appeared could be presented in a table, along with commentary to provide a summary description for each main change. Using one or two anonymised quotes from participants' kōrero can support understanding of each change-related theme and will ensure the visibility of participant voices. This will bring the changes to life and help readers understand the code categories used and related change indicators or themes.

As stated in Step 6, it is important that any quotes used do not identify the participant in any way. For the pilot, we reviewed the quotes more than once as a team to make sure that they did not include any references that could unintentionally identify the participant. We removed any specific words that might identify the participant, which included changing words to be generic, or removing them entirely. For example, if a quote refers to a participant's father taking certain actions, it would be better to change this to [parent]; if a quote refers to a participant's occupation, it would be better to refer to the occupation as [X].



Suggestion

Read any participant quotes used in the report together as a research team to make sure these do not unintentionally identify the participant.

If there is a project advisor or an advisory group, the draft report can be shared with them and a hui held to get their feedback on the report and the findings before these are shared with the community. A further hui with the advisors should also be held, once the report and findings have been updated to include feedback provided from the community.

A hui to take the findings back to the community will provide the opportunity to explore and validate the findings. The community may choose to provide feedback at that hui or later, in further hui or in written form.

The community may feel comfortable in their understanding of the findings from the summary report, choosing to provide written feedback on the report rather than through hui (as one community did during the piloting, which was validating and insightful).

It is important to find out whether the community wishes to be named in the report. If they do not, then they could simply be referred to as 'the community' or another generic term.

Once the report has been finalised with community feedback (and advisory group feedback, if relevant), it can be shared with those participants who indicated that they wanted a copy of it, along with each participant's audio recordings and notes, if requested. Notes and audio recordings should be deleted for those participants who requested this.

The community can use the report and findings to reflect on the impact of E Tū Whānau and how this aligns to their aspirations and the work they have invested in. This can help guide potential areas for ongoing and future focus, to support and best serve whānau and community needs. The findings can provide a baseline to look forward and back to, to understand transformative change and for E Tū Whānau to report on outcomes and impacts.

Closing words

We hope this kete provides a helpful guide for using E Tū Whānau Tikanga Rangahau to understand the important changes that communities experience through E Tū Whānau.

Heartfelt thanks to the three communities who participated in the piloting, which has enabled E Tū Whānau Tikanga Rangahau and this Community Kete to be brought to life. Their involvement in and contribution to this process has been invaluable. The research team felt very privileged to engage with such inspirational and beautiful people through each of the guided conversations and to hear the significant stories of change experienced through E Tū Whānau.

Ngā mihi nui ki a koutou katoa.

Appendices

Appendix A: Participant Information Sheet and Participant Consent Form

Participant Information Sheet

Designing and developing E Tū Whānau Tikanga Rangahau with communities Information Sheet

E ngā mana, e ngā reo, e ngā karangamaha tanga, tēnā koutou katoa.

Thank you very much for your interest in being involved in a research conversation to contribute to the design and development of E Tū Whānau Tikanga Rangahau aimed at understanding the impact of E Tū Whānau.

This work has been commissioned by the Research and Evaluation Insights team of the Ministry of Social Development, with the support of the E Tū Whānau team.

Please note, you can choose at any time to not participate in this research. Choosing to not participate does not affect your involvement with E Tū Whānau in any way.

What is the research?

This work is developmental. In 2021 and 2022 we will be visiting three communities to try-out or pilot a short number of broad questions. Our aim is to gather data to identify the nature and extent of key changes for whānau and communities since their involvement with E Tū Whānau.

Unlike a typical tick-box survey or questionnaire, the approach we will be taking is in the form of guided face-to-face / kanohi ki te kanohi conversations with grant-holders, kahukura, whānau and community members, and, as relevant, community agencies. If COVID-19 does not make kanohi ki te kanohi possible, we are able to have the conversations by Zoom (online face-to-face kōrero) and by phone if preferred.

We will use our experiences from the three communities to continue to develop and shape the research questions, as well as the research approach. This is to refine the questions and process so it can be used across E Tū Whānau communities and by communities themselves. We will develop a kete for communities to guide their own future use of this research method should they wish to use it.

We are looking at how well the research questions and research process can identify and measure change over time because of E Tū Whānau, and in a way that is appropriate and useful to communities.

We will use the information that we collect to identify the different changes experienced across the three communities. We will compare this information to insights that we have already collected on the impact of E Tū Whānau. This will help us to review the value of different research approaches as well as the different measures of change relevant to E Tū Whānau.

Who are the field researchers?

We have a team of three researchers who will be carrying out the research.

- Patria Tamaka (Field Researcher; Waikato, Ngāti Ruanui, Ngāti Maru, Ngāti Kahungunu ki Wairarapa)

- Fleur Chauvel (Field Research Lead) (Pākehā, Tahitian)
- Dr Lara Greaves (Research and Data Lead; Ngāpuhi, Pākehā, Tararā)

This team will be supported by the E Tū Whānau team and where possible the local kahukura.

What will happen during the research conversations?

- The research team will be introduced to each community by E Tū Whānau kaimahi / kahukura.
- The researchers will meet with grant-holders, kahukura, whānau, community members and community agencies. Conversations will be tailored towards identifying and listing the changes that have been experienced since being involved with E Tū Whānau.
- The research team will carry out the research conversations either with individuals, in pairs, small groups and / or with whānau. If by Zoom, the conversations will be one-to-one or in pairs.
- It is likely that there will be two researchers involved in each conversation (this will help with note-taking etc).
- An individual conversation will take between 30 minutes and 1.5 hours. Conversations with more than one person will probably take longer. The length of the conversation will depend on how much each participant would like to share.

How will my information be protected?

- The information that you provide will not be attributed to you by name in any discussion by the researchers outside the research team or in any report, unless you tell us that you would like to be identified. The exception is if, during the conversation, the researchers become concerned that you are at serious risk of harm. In that situation, the researchers may have to talk to kahukura / E Tū Whānau kaimahi about your situation and what you have shared. They would discuss this with you first.
- Where more than one person participates in a research conversation, the researchers will ask participants not to share each other's information. This is because the researchers cannot control the sharing of your information by others who have participated in the conversation. If the research happens on Zoom in a location where you are not alone, we will ask you to protect privacy by being in a room where no-one else can hear, arranging the Zoom at a time when no-one else will be around, wearing headphones etc. A phone conversation is also an option.
- Participation is voluntary. There is no requirement to take part. Whether or not you participate will have no impact on your relationship with E Tū Whānau.
- You will not be expected to answer any question that you do not want to, and you can stop the conversation at any time.
- The conversation will be audio recorded if you agree. The researchers will not share your audio recording with anyone who did not participate in your research conversation.
- If you would like, we will provide you with a summary of the notes and / or audio recording from your conversation, and a summary of the overall report.
- You can withdraw from the research up to two-weeks after the research conversation. If you decide to do so, the evaluation team will remove the information that you have shared from the research, or specific parts of the conversation that you no longer wish to contribute. However, please note that it may not be possible to

remove your information if it has been shared in a guided conversation that has involved one or more people.

- The notes taken by the researchers and audio recordings will be securely stored. At the end of the project, the audio recording and notes from your research conversation will either remain securely stored with the researchers for two years, returned to you or deleted, in accordance with your wishes. The exception may be if your research conversation took place with another person(s) and there was not agreement about how the information should be held. In such case, the researchers will return the information to you. The researchers will talk to you about this before the research conversation starts.
- In appreciation of people's knowledge contribution and generation, we are able to provide each participant with a koha to the value of \$30.

The researchers will discuss this information with each participant before the research conversation starts.

Please feel free to contact any of the people listed in the table below if you would like to discuss the research or have any questions.

Thank you very much for your time and consideration.

Ngā mihi ki a koutou katoa.

Field researchers		
Fleur Chauvel, (Consultant)	Field Research Lead	(contact details provided)
Patria Tamaka (Ministry of Social Development, E Tū Whānau)	Field Researcher	(contact details provided)
Project research and data lead		
Dr Lara Greaves (Consultant)	Research and Data Lead	(contact details provided)
Ministry of Social Development Research and Evaluation Insights		
Kahukore Baker (Ministry of Social Development)	Principal Analyst, Māori, Research and Evaluation Insights	(contact details provided)
E Tū Whānau, Ministry of Social Development		
Heni Turner (Ministry of Social Development, E Tū Whānau)	E Tū Whānau lead	(contact details provided)

Participant Consent Form

Designing and developing E Tū Whānau Tikanga Rangahau with E Tū Whānau communities

Tēnā koe

Thank you very much for taking the time to contribute to this work.

Please review the following information below, tick the box next to each agreed item and sign at the end. Leave any box that you you're not sure about or don't agree with unchecked.

Please let the research team know if you have any questions, don't feel you've been provided enough information or if there are any boxes that you do not wish to tick. We can then discuss in full any item that you do not tick to make sure you have all the information that you need to decide whether or not to participate.

Please note that the E Tū Whānau team will not know whether or not you choose to participate – in other words, whether or not you participate will in no way affect your relationship with E Tū Whānau.

- ☐ The researcher has explained the purpose of the research to me. I understand the purpose of the research and that I can ask questions about the research at any time.
- ☐ I understand that my participation is voluntary and that I do not have to participate if I do not want to.
- ☐ I understand that I don't have to answer any question I don't like and I can stop the interview at any time without having to explain why.
- ☐ If, within two weeks of the research conversation taking place I decide that I do not wish some or all of my information to be used, I understand that I can tell the researchers to withdraw my contribution without having to explain why.
However, I understand that the researchers may be unable to withdraw my information if I have provided this in a guided conversation that involves more than one participant, and if the other person(s) have not said that they wish to withdraw their information.
- ☐ I understand that the information I provide will not be attributed to me by name unless I indicate otherwise. My name and identifying details will not be used in any discussion by the researchers outside the research team and nothing will be published in any report that might identify me.
However, I understand that if, because of the information I provide, the research team thought that I or someone else was at serious risk of harm, they may have to break confidentiality and talk to a member of E Tū Whānau about their concerns. Should they need to they will discuss this with me first.

- ☐ I understand that if I am part of a research conversation involving other people sharing their E Tū Whānau experiences, I will not share that information with others.
- ☐ I agree to the research conversation being audio recorded.
- ☐ I understand that the audio recording of my research conversation and notes from the conversation will not be provided to any person outside of the research team (other than myself or the participants in my guided conversation, if requested). I understand that at the end of the project, the audio recording and notes will either be securely stored, deleted, or returned to me, in accordance with my wishes (as indicated below). However, if the research discussion involves more than one participant, the audio recording and notes will either be returned, stored, or deleted in the manner agreed by consensus, or returned to me if the group cannot agree.
- ☐ I agree to participate in this research conversation.

Signed: _____

Date: _____

Audio recording

Following the guided conversation

- ☐ I would like a copy of the audio recording (optional) at the end of the project (late 2022/2023).
- ☐ I would like the audio recording of my discussion returned to me.
- ☐ I would like the research team to delete the audio recording.
- ☐ I would like the research team to retain the audio recording for two years.

Notes from the research conversation

Following the guided conversation

- ☐ I would like a copy of the summary of notes taken from my research conversation (optional) at the end of the project (late 2022 / 2023).
- ☐ I would like the summary notes from my research conversation returned to me.

☐ I would like the research team to delete the notes.

☐ I would like the research team to securely retain the notes for two years.

Final report

☐ I would like a copy of the summary of the final report (optional).

Please send the audio recording, summary of notes and / or report summary to:

Name: _____

Email address: _____

or

Postal address: _____

Appendix B: Draft research plan to guide field research planning

Activity	Focus	Potential dates (and subject to suitability for the community)	Ongoing actions needed
Field research planning workshop	To confirm all aspects of the field research including agreed ways to engage participants, provision of koha, identifying learnings to capture for the development of a community toolkit.	Morning of either 31 January or 2 February 2022.	Confirm workshop date. Confirm if to occur in person or by Zoom. Confirm attendees.
Individual guided conversations with: - Kahukura - Kaimahi - External stakeholders	Field research – guided conversations to begin piloting the research instrument.	Two consecutive days in the week of 14 February 2022.	Confirmation of appropriateness of approach and timeframe. Identification of potential participants. Confirm two days that week.
Brief feedback and reflections following February field research	Optional opportunity to discuss progress, learnings and emerging themes. Confirm April field research process.	One hour by Zoom in the week of 14 March 2022.	Confirm if this feedback loop is wanted / would be of use. Confirm date and time.
Individual guided conversations with whānau participants	Field research - guided conversations to pilot the research instrument.	Week of 11 April – one-two consecutive days.	Confirmation of appropriateness of approach and timeframe. Identification of potential participants.
Workshop with community	Optional workshop to share learnings feedback, findings and insights. Discuss outline for community toolkit.	Half day week of 2 May 2022.	Confirmation of appropriateness and timeframe.
Community report and toolkit provided	To give back the research learnings.	July 2022.	Completion of fieldwork, analysis and review.

Project considerations

- The preference is for the guided conversations to take place kanohi ki te kanohi, in-person. Zoom would be a default mode if circumstances change to require this. Participation by Zoom (or even by phone) can also be an option, if preferred by individuals (e.g. if more convenient, if concerns about COVID-19, vaccination etc).

Once a plan and proposed timeframe are confirmed, the logistics of a Zoom contingency can be worked on, if required and if appropriate for the community.

- It is proposed that the conversations take place individually so as to focus on and capture individual stories and reflections of change. This will assist the process to understand how well the research instrument brings out such information. Individual conversations will also minimise the time required for each conversation and reduce the burden for participants.
- The project team has been previously advised by the MSD Ethics Committee that it would be useful to identify a couple of venues where the guided conversations take place. This would give participants a choice and may support their feelings of safety and comfort.
- Each conversation will probably take anywhere between half an hour and 1.5 hours.
- The researchers will work with what suits the community best in terms of the conversations taking place in the day, evening, weekday or weekend.
- A community report will be provided to the community at the end of the research. The report will also be held by MSD's research unit and the E Tū Whānau team as a foundation reference for the ongoing development of the research instrument.

Appendix C: Calendar to schedule guided conversations

Table 1: Guided conversations with kahukura and external stakeholders

	Monday	Tuesday	Wednesday	Thursday	Friday
APRIL 2022	11	12	13	14	15 Easter
	18 Easter	19	20	21	22
	25 ANZAC day	26 10am – Participant name	27	28 11am – Participant name	29 9.30am – Participant name
MAY 2022	2	3	4	5	6
	9	10	11 1pm – Participant name	12	13
	16	17	18	19	20
	23	24	25	26	27

* Unshaded is available. Shaded is unavailable. For the date that suits each participant, please add into the table their name and preferred time.

** Each individual conversation should take between 30 minutes and 1.5 hours. Please feel free to schedule anywhere between 1 and 4 individual conversations on any one day.

Table 2: Scheduling guided conversations with kaimahi and whānau

	Monday	Tuesday	Wednesday	Thursday	Friday
APRIL 2022	11	12	13	14	15 Easter
	18 Easter	19	20	21 1pm – Participant name (Office) 2.30pm – Participant name (Office)	22 1pm – Participant name (Office) 2.30pm – Participant name (Office)
	25 ANZAC day	26	27	28	29
MAY 2022	2 1pm – Participant name (Office) 2pm – Participant name (Office)	3 10am – Participant name (Office) 11.30am – Participant name (Office)	4 11am – Participant name (Office)	5 1pm – Participant name (send zoom link)	6
	9	10 10am – Participant name	11 10am – Participant name (Office) 11.30am – Participant name (Office)	12 2pm Participant name (send zoom link)	13
	16	17	18 12.30pm – Participant name (send zoom link)	19	20

* Unshaded is available, shaded is unavailable. For the date that best suits each participant, please add into the table their name and preferred time.

** Each individual conversation should take between around 30 minutes and 1.5 hours. Please feel free to schedule anywhere between 1 and 4 individual conversations on any one day.

*** Aim to schedule most of the first conversations with kaimahi, followed by whānau – but only if that works with people's availability.

Appendix D: Recording the participant's changes

Participant Unique Identifier: XYZ003

CHANGE
1.
2.
3.
4.

Appendix E: Master list: Participants' details and unique identifiers

Unique Identifier	Participant	Conversation date, time	Demographics			Consent		
			Gender	Age	Ethnicity	Audio	Notes	Report
Kahukura								
XYZ003	Name	01.01.21 11.am	Tāne	55	Māori	No Delete	No Delete	Yes
XYZ004	Name	01.01.21 2.pm	Tāne	64	Māori	No Keep	Yes Keep	Yes
Individual, whānau participants								
XYZ010	Name	02.01.21 11.am	Wāhine	30-39	Māori, Scottish	Yes Delete	Yes Delete	Yes
XYZ011	Name	02.01.21 3.pm	Tāne	21	Māori	No Delete	No Delete	No
Stakeholders								
XYZ021	Name	05.01.21	Tāne	44	Māori Pākeha	No Delete	Yes Keep	No

Note: This master list could also include a column identifying whether or not participants have agreed to the possibility of being contacted in the future to be invited to participate again in E Tū Whānau Tikanga Rangahau.

Appendix F: Information to include in Excel spreadsheet for coding

Column name	Description	Example(s)
ID NUMBER	The unique identifier (ID number) you assigned the participant in the place of their name, may be letters and / or numbers.	ABC001
DATE & TIME	The date and time of the conversation (this should be kept private to protect people's identity). You can use this information to describe the date range the research took place.	5/5/22 5pm
RESEARCHERS	Optional. If you have a research team it may be good to specify who the researchers are.	Hera & Joe Hera
CATEGORY	Type of participant – helps to keep track of what kind of questions they got. Important information for reporting how many of what kind of participant you spoke to.	Whānau Kahukura Stakeholder
GENDER	The gender the participant said they were. This information can be useful to build a picture of who participated.	Tāne Wāhine Non-Binary
ETHNICITY	The ethnicity the person said they were. This information can be useful to build a picture of who participated.	Māori Scottish & Māori
AGE	The age that the participant said they were, this may be a number or a range. This information can be useful to build a picture of who participated.	52 50-65
NUMBER OF CHANGES	A number – the count of the number of changes that the participant named overall. You simply count this and type it in.	6
CHANGE1.raw	The place to paste the “raw” data for the first change from the change table notes. Paste it word for word into this cell.	I noticed communications are more open, noticing changes with other participants where one used to be out the gate but now she's in the gate: family/relationship issues, now she's not afraid to share her journey and who she is.
CHANGE1.code1	Type in the code for the first change in the data. There may only be one.	1.2
CHANGE1.code2	Space for the second change code (if needed). We have given space for five but you do not need to use them all.	1.3
CHANGE1.code3		3.1
CHANGE1.code4		
CHANGE1.code5	If you need more columns for change codes, then simply right click the top of the column in the grey area and select “insert” to add.	
...	These columns continue through to 20 changes in the template. Add more if needed.	



[instagram.com/
etuwhanaunz/](https://www.instagram.com/etuwhanaunz/)



[youtube.com/
c/ETūWhānau1](https://www.youtube.com/c/ETūWhānau1)



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