

## Scenario approximation in a phenomenological study in Mexico: experience report

*Acercamiento al escenario de estudio fenomenológico en México: relato de experiencia*

*Aproximação ao cenário de estudo fenomenológico no México: relato de experiência*

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### ABSTRACT

**Objective:** To report our experience using scenario approximation in a phenomenological study of nursing in Mexico. **Method:** Experience report on scenario approximation to coexist with elderly in order to select the participants of a phenomenological study. **Results:** During a four-month period in 2016, visits were carried out two groups of elderly individuals where several activities were carried out. Coexistence with the elderly throughout accompaniment in the groups' activities together with joint dialogue allowed selection of those who corresponded to the characteristics of the study objective. **Conclusion:** Scenario approximation is necessary in phenomenological studies, not only for creating empathy among the participants but also for the researchers to immerse themselves in the phenomenon under study, as shown by the first approaches of the researcher. **Descriptors:** Qualitative Research; Nursing; Elderly; Philosophy; Hermeneutics.

### RESUMEN

**Objetivo:** Relatar la experiencia del acercamiento al escenario de un estudio fenomenológico en enfermería en México. **Método:** Relato de experiencia sobre el acercamiento al escenario de estudio para convivir con adultos mayores con la finalidad de seleccionar a los participantes de un estudio fenomenológico. **Resultados:** Se llevaron a cabo visitas durante el año 2016, en un periodo de cuatro meses a dos grupos de adultos mayores en donde se realizaron diversas actividades. La convivencia con los adultos mayores a través del acompañamiento en las actividades que realizaban en los grupos y el diálogo conjunto permitió seleccionar a aquellos que respondían a las características del objeto de estudio. **Conclusión:** Es necesaria la aproximación al escenario de estudios fenomenológicos, no sólo con la finalidad de ganar empatía de los participantes sino para sumergirse en el fenómeno de estudio, mismo que se va mostrando desde los primeros acercamientos del investigador. **Descriptor:** Investigación Cualitativa; Enfermería; Anciano; Filosofía; Hermenéutica.

### RESUMO

**Objetivo:** Relatar a experiência da aproximação ao cenário de estudo fenomenológico de enfermagem no México. **Método:** Relato de experiência sobre a aproximação ao cenário de estudo para conviver com idosos, com o objetivo de selecionar os participantes de um estudo fenomenológico. **Resultados:** Foram realizadas visitas no ano 2016, durante um período de quatro meses em dois grupos de convivência de idosos, onde várias atividades foram realizadas. A convivência com idosos através do acompanhamento nas atividades realizadas nos grupos e o diálogo conjunto permitiu selecionar aqueles que responderam às características do objeto de estudo. **Conclusão:** É necessária a aproximação ao cenário de estudos fenomenológicos, não só para ganhar a empatia dos participantes, mas para mergulhar no fenômeno do estudo, no que se mostra, desde as primeiras aproximações do pesquisador. **Descritores:** Pesquisa Qualitativa; Enfermagem; Idoso; Filosofia; Hermenêutica.

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## INTRODUCTION

Phenomenology unites the philosophical and methodological approaches to address the experiences of human beings and their significance; the essence of each experience as a phenomenon of its relation to the world<sup>(1)</sup>. It is the meeting of a human being with that which he has lived and that has made him who he is today. Hermeneutics brings an understanding of self, a form of ontology that allows one to explore one's very existence<sup>(2)</sup>, such that phenomenology is an existential phenomenology that studies the flow of human consciousness in the world and how it attributes meaning to one's lived experiences.

Approximation to the study scenario(s) enables the researcher to be familiar with the structure of the scenario, the dynamics with which it functions, and in turn can become known by the people and can present the research proposal to be undertaken<sup>(3)</sup>. In this manner the researcher begins to submerge himself in the world of the phenomenon and to comprehend where the research subject is immersed. This approximation is the time to establish relationships with the people that are there, together with the service professionals and participants<sup>(4)</sup>.

In order to enter into and understand a phenomenon, firstly it is necessary to approximate oneself, thereby becoming immersed in the world in which the phenomenon takes place. The researcher becomes a "being within the world" so that he can also understand the phenomenon he intends to study. This approximation is a type of familiarization to draw closer to the participants who live and experience the phenomenon under study.

The familiarization makes it possible to develop a compromise between the researcher and the people that comprise the scenario being investigated, establishing helpful attitudes for the selection of the venue for the interview and access to the research subjects<sup>(3)</sup>. In this familiarization there is a need to move around, mediated by subjectivity, in which you can perceive the singularity, you seek meaning, in the silences, the speech, what is said and what is not said, endeavoring to respect and engage in a listening exercise<sup>(4)</sup>.

For this reason, in phenomenological studies it is necessary to establish an approximation to the study scenario that helps the researcher to immerse himself in the elements that structure the phenomenon in order to arrive at their understanding. This approximation to the study scenario also allows the participants to feel the researcher has identified with them, thereby favoring a sense of empathy, confidence and security among the participants.

The objective of this article is to report the experience of scenario approximation in a phenomenological study into nursing in Mexico. This will allow other phenomenologists conducting research into nursing to garner elements to help reinforce the phenomenological research method.

## METHOD

This is an experience report regarding scenario approximation in a phenomenological research study into nursing. The paper describes one of the preliminary stages to access the

phenomenon as a lived experience of the people, since the researcher must immerse himself in the phenomenon itself and live and learn from it.

The research project is part of a Doctoral Thesis titled "Transcendence of the elderly: a phenomenological proposal of nursing" in which a phenomenological approach was chosen that would allow an understanding of those lived experiences of the elderly on their path to transcendence.

## EXPERIENCE REPORT

The first stage of a research project is its construction, it determines the phenomenon to be addressed and establishes the methodological approach that will allow this phenomenon to be unveiled, that is, to comprehend and interpret it. It was decided to explore the transcendence of the elderly, this transcendence is understood to be the process of comprehending oneself and this leads to asking yourself about your very essence.

This transcendence highlights the capacity of the human being to expand his vision of himself, achieving an understanding of his being and the origin of given relationships with himself and his environment and beyond himself; it is the significance of the very existence of oneself.

This existence is given by modes of the human being through time, time in a conception of one's lived experiences that are marked in your personal history; understanding that which was past, present and yet to be and becoming and giving a meaning to all that one has lived. When a human achieves an understanding of himself as an integral being, then the being has transcended and this will manifest through enlightenment, understood as maximum well-being.

In this way a research question was established; how do lived experiences favor the transcendence of the elderly? Thereby, aiming to understand those experiences of the elderly that enabled them to transcend.

The research study followed all the methodological rigor of phenomenology, so as to allow access to these experiences as expressed by the elderly; as well as reinforcing the use of phenomenology as a research method to delve further into the ontology of these phenomena<sup>(5)</sup>.

The theoretical-philosophical reference of phenomenology by Martin Heidegger was opted for, since it would allow through its characteristic of existentialist phenomenology to accede the being through the discourses of the person as an entity and to unravel this being in order to understand and to interpret their transcendence, which would be accessed through the temporality and historicity of the elderly<sup>(2,5)</sup>.

The project was submitted to the Research Committee of the Division of Health Sciences and Engineering of the Campus Celaya Salvatierra of the University of Guanajuato. The observations made by the Committee were duly met and supported by the phenomenological method.

On obtaining the registration number of the project, two institutions that cater to the elderly were approached: a daycare center Casa de Dia and a senior citizens' Civil Association. The participation of the researcher was approved to carry out the research in both entities; these became the scenario to

develop the phenomenological approach via the phenomenological interview.

Upon obtaining authorization, the visits began with a first approximation, which consisted of getting to know each of the groups and establishing consecutive visits, which lasted for two months. The group of retirees has a meeting on the first Thursday of each month and group meetings to look after a garden in a school. The Casa de Dia day center has daily meetings attended by the elderly, from 8:00 a.m. to 5:00 p.m.

For the phenomenological qualitative research we opted to select the participants in a theoretical or intentional way, that is these participants must have experienced the phenomenon under study and which would allow it be revealed via the descriptions of those who were experiencing it. For this reason, we sought the elderly who were identified as transcendent, over 60 years of age and irrespective of whether they are men or women; since the search for the transcendence of Man as expressed by Heidegger is without distinction of gender, attributing importance to the essence of the phenomenon to be understood<sup>(6-7)</sup>. Since the term transcendence was considered too complex a term to be understood by the participants, a more accessible word was chosen and the term "well-being" was selected. A revision of the literature on transcendence and in turn philosophical theoretical reference, showed that well-being is expressed as the maximum manifestation of a person who has transcended. Such that transcendence would be explored as a process in a person's life and the result of this is now the sense of well-being among the elderly.

For this reason, the selection was performed at two different times: the first with the approximation to the study scenario, so that at a given moment the elderly could express a sense of well-being, or that is, they were asked "*in this stage of your life do you feel a sense of well-being?*" This was the question denominated "question filter" that served to identify the participants.

The second moment was the phenomenological interview with the guiding or excluding question<sup>(8)</sup>: "*Tell me what experiences in your life do you think helped you to feel well-being at this stage?*" The discourses would reveal the phenomenon of transcendence as a path through the historicity of the person and in turn constituted by the temporality of the same. Those who manifested well-being in the present stage of old age were informed of the research, its purpose and asked if they consented to participate in it<sup>(9)</sup>.

Visits were carried out on Tuesdays to the group of retirees and three times a week to the Casa de Dia. During this coexistence it was possible to verify that the sense of well-being besides an individual concept, is internalized by the person. A large proportion of the elderly responded they did not feel well-being, some of the reasons cited were: suffering from a chronic-degenerative disease; feeling or living alone; depression or depressive symptoms; having been abandoned; not having access to health services or financial resources; and physical health limitations.

Other elderly individuals expressed their willingness to participate despite affirming they did not feel well-being, but desired to know why not and how to reach that transcendence and manifest well-being; This result is very interesting because

the intention of the study is to address such understanding and realize further developments.

Some of the elderly did not give consent to participate in the study after being informed of the reason for the question, since they affirmed that their well-being was a product of suffering during their life and that it was too difficult for them to remember those moments; others did not want to participate because they had too many activities.

This finding is interesting, since one has the belief that being elderly is tantamount to having a sense of well-being, or that is, they will manifest feeling well-being by the emotion of the moment. In some way, many of them had different conceptions of well-being and that was reflected in the answers as to why they did not feel well-being. Nevertheless, here is a key point of phenomenology, namely that the investigator must be stripped of preconceptions, religious and moral or affective value judgments. As expressed by Heidegger that which is known of the world or concepts are given by medium and vague theories that are not the integrity and totality of the self, this being that would reveal itself later in the phenomenological interview<sup>(2)</sup>.

Of the retired group, 9 participants were recruited, while only 2 from the Casa de Dia. By performing an analysis prior to this and based on those who responded in a negative way, the researcher can highlight that the elderly at Casa de Día are those who did not feel well-being for the above mentioned reasons. Furthermore, during the visits a very marked passivity could be observed among them. On the other hand, in the group of retirees it was noted that there was more physical activity, higher levels of independence and a greater understanding of their physical, emotional and social capacities. This is important to note, because it would be interesting to conduct further work on this later in both groups.

The afternoon visits were scheduled for two months later, this first approximation was an essential part of the phenomenological study, since it allowed the researcher to know the people, besides garnering empathy, it showed that it is not easy to perform these meetings with a phenomenological vision.

On a daily basis, the researcher prepared himself emotionally for the coexistence, before each meeting through controlled breathing exercises and meditation for ten minutes. After each visit a period of emotional detachment was achieved through a brief 15-minute meditation.

The first month constituted an approximation by participating in the activities of the group, the researcher did not perform additional structured activities and only participated in those already established in the group. Regarding the group of retirees, the weekly meetings were attended together with participation in the gardening activities, in addition to accepting invitations to participate with them in other activities, for example, breakfast or spending time together. In these meetings, the researcher talked to each individual and asked about the person, who he was or who she was. This activity did not yet determine the selection, because it was not classified based on its presentation, on the contrary, it was to become familiar with each other; The elderly began to recount some of the group's experiences and about their activity and development within it. In the same way, the Casa de Dia groups were visited

together with participation in the activities and emphasis on having personal meetings with the elderly.

In the second month, informal interviews were continued, in which during the conversations some of them expressed feeling well-being, satisfied or complete at that moment. This was reinforced by asking them the filter question, after informing them about the research they were asked whether they consented to participate; some were asked the question during the conversation itself. For only those who agreed to participate, the day, time and place for the interview was arranged, in such a way that it would be a comfortable, quiet place that would allow the elderly to express themselves freely, most of them chose their own home. Only those attending the Casa de Dia elected to be interviewed in a private area within the institution. For this, permission was requested in advance, to conduct the interview.

Likewise, the participants chose the time and day when they had time available for this to take place. With some it was necessary to reschedule the day and time agreed upon, and for this they had the phone number of the researcher to let him know that they had some other commitments. Thus it is relevant to highlight that since the people are themselves the instrument of collection of the conversations, such that the investigator must count on the patience, time and disposition for this type of contingency.

Some of the elderly forgot the appointment date for the interview and at that time could not be located, the researcher subsequently contacted them to re-schedule the meeting.

The second month continued with the scenario approximation. We considered whether the concept of well-being or transcendence would not be the same for one or the other, in fact, this was observed during the approximation, wherein lies the wealth of phenomenological research. In that transcendence was not already limited to a pre-established concept, but each of the elderly gave meaning to their lived experiences.

It seeks to explore the phenomena through a determined path; according to philosophical thought, in this case the phenomenology of Martín Heidegger, which helps to advance methodologically and enables an approximation to that which is the being itself. When you understand yourself you have transcended and this path of understanding can have many variants as was shown previously by some of the elderly who declined to participate.

The reason for not participating was that they considered this path to be painful, although it helped them to understand themselves at this stage of their lives, thereby showing this transcendence as an understanding of oneself could cross different paths and these paths as lived experiences, are those which in proximity will be shown to the researcher through language. The elderly would bring to mind that which they considered to have led to their comprehending and current sense of well-being in the third age.

The second month began with some interviews, which continued into the third and fourth months. The interviews were conducted both in the home and in a private place in Casa de Dia. The next step was the personal meeting through the phenomenological interview, this meeting of two people

immersed in a world, in a phenomenon, in a sea of "why". This exploration that will hear each person, the same person who will disclose something for which he has attributed meaning and reveal this to the interviewer.

For each interview the same physical and emotional preparation procedure was followed, the investigator was duly rested, paying attention to the interview time, checking the algae is recorder before and after each interview, and preparing himself with breathing and meditation exercises before the interview and for 10 to 15 minutes afterwards by another meditation exercise.

The interview was transcribed and listened to on the same day to achieve an approximation to each of them. In this way the saturation of the data was determined, since while listening the researcher had all that each participant had mentioned fresh in his mind thereby achieving clarity in deciding when the information has been saturated.

The first approach had considerable elements for the following meetings in the same scenario, as well as for individual interviews; providing a sense of security to the researcher and allowing him to strengthen his research subject, in addition to its methodological bases.

## THEORETICAL REFLECTION

It is important to emphasize some aspects of qualitative research, such as the fact that quantitative is denominated sampling; whereas in qualitative research there is no type of sampling, because it is impossible to select random participants, since it seeks an understanding of the phenomena itself as opposed to the people that experience the phenomenon, therefore it is denominated theoretical or intentional sampling<sup>(7)</sup>.

As observed in this approximation to the study scenario, some of the elderly stated that they were not experiencing the phenomenon of transcendence as reflected in a sense of well-being, therefore these elderly were not experiencing the phenomenon.

This form of understanding of whether or not the phenomenon is presented comes from the same being along the path to finding oneself. Generally positivist research questions the truth of the reality, while qualitative considers that reality and the perception of the human being. Phenomenology in particular seeks to understand the experience of the human being in his reality from his lived experience.

According to Heidegger's hermeneutic phenomenology, reality represents this manifestation of being in certain phenomena and is already an understanding that comes from the daily life of the human being, that human being who is and is in the world, and for whom the experiences are the product of his relationship with the world, the same experiences to which he attributes meaning that he reserves for himself because it forms his being.

By keeping it to himself, in a future time it will rise into his consciousness and when this happens, a flow of understanding of oneself occurs when faced with certain questions, since the human being is in the world and living in the world experiences his daily life. This everyday life can be analyzed in



itself, representing only an average form of understanding that will be internalized by the human being in the interview and revealed to the researcher, such that the researcher comprehends that everyday life<sup>(2)</sup> and from the moment that meetings take place with the participants, provided they are willing to talk about the issues that they are asked about.

It is said that the researcher comprehends the phenomenon in the same quotidian as the interviewed human being and to be able to have access must be one with him in the world, to be part of his world and be submersed with him. This is the reason why the familiarization, the scenario approximation, provides a fundamental basis for the phenomenological study, the meeting with, analysis and understanding of the phenomenon.

Through this meeting with the being in the interview, the researcher enters into his daily life, for which he must be attentive to this, he should not merely arrive and inquire about the phenomenon, it requires immersing himself in the world of the human being who experiences the phenomenon<sup>(2)</sup>. Thus it is essential that the researcher is also aware of the world of the human being he is interviewing, through the approximations that precede the phenomenological interview.

The approximation or familiarization also suggests that the appropriation of the phenomenon involves a type of acculturation, an approach to routines, habits, language used by participants and most importantly, to the phenomenon itself<sup>(10)</sup>: the quotidian. The approximation as a submersion into the phenomenon introduces the general culture of the study scenario, breaks down barriers of mistrust, allows a true encounter between interviewee and researcher and fewer random circumstances ensue that could sometimes veil the phenomenon.

In addition to providing this knowledge about the phenomenon, scenario approximation leads to personal acceptance by the participants, giving greater quality to the data obtained and helps the researcher to interact with the language and cultural background of the participants<sup>(1,10)</sup>. It is a time invested to familiarize oneself with the scenario for the phenomenological interviews that will require a set of data that will be easier to collect when the participant is with a researcher who he has been able to approximate and with whom it will be easier to be open and to talk about their experiences that are related to the phenomenon.

In the same way, it makes the researcher more critical, since he will be able to learn from the phenomenon itself, removing personal prejudices and stripping himself of assumptions; instead he will become intuitive, more analytical and open to understanding the phenomenon as he shares it with the world.

## FINAL CONSIDERATIONS

The approximation to the study scenario provided the researcher with several methodological and theoretical tools to be better able to approach the elderly participants at a later date through the phenomenological interview.

This approximation enabled the researcher to learn to shed his own presuppositions and preconceptions, and allowed him to be open, to observe the phenomenon, to understand it and to enter into that being-in-the-world of the person, how he comprehends and gives meaning.

The researcher considers that the phenomenological method has its own path parallel to other methods in qualitative research. It is a difficult method to comprehend and that entails physical, emotional, spiritual, methodological and philosophical preparation; although it is true that there are no definite or final rules, each phenomenological researcher in nursing brings new experiences that allow a methodological reinforcement of phenomenology within this science of caring, thereby allowing the researcher to strengthen this research method for nursing.

The researcher must understand himself, to know who he is, what he wants to discover and how to proceed. Part of the preparation for detachment is likewise based on the contribution of the same philosophical theoretical reference denominated to move away, or that is to distance oneself from the phenomenon in order to become closer, this led the investigator to look for strategies such as the controlled breathing exercises or meditation afterwards in order for the same thought to flow and be ready for a new encounter.

The approximation to the study scenario allowed an immersion into the phenomenon to be investigated and to gain understanding from it, in a theoretical and methodological sense. From a personal point of view, it allows one to go beyond empathy, since the participants will have an accompaniment and it will be easier for them to discuss their lived experiences, since they will be face to face with the researcher, identifying him as part of their world.

This researcher suggests having a clearly determined idea of this approach in the research method and to have the necessary elements to be able to perform it in the best manner and with all the rigor that allows a continued strengthening of phenomenology as a research method in a nursing.

Furthermore, it is recommended that if you decide to conduct research using this method, always discard personal concepts, moral and religious ideas, in addition to eliminating social concepts or classifications and never make a *priori* judgments, but on the contrary always be open, willing to listen, willing to learn and willing to discover the phenomenon.

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