

VERFREMDUNG IN MANAGEMENT EDUCATION: INITIATING CRITICAL REFLECTION

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Bachelor of Arts in Social Sciences

Master of Arts in Social Sciences

A thesis presented to Macquarie University

in fulfilment of the requirements for the degree of

Doctor of Philosophy

Macquarie Graduate School of Management

2012

ACKNOWLEDGEMENTS

I offer the greatest thanks to my supervisor Stefan Meisiek, whose guidance, relentless support, constructive suggestions and above all, unfaltering encouragement has made this thesis possible. I also owe gratitude to my supervisor Richard Badham, who, by granting me a scholarship enabled this research endeavour in the first place. By introducing me to the field of management and organization studies he taught me how to deal with uncertainty and how to persist in all circumstances.

I am deeply indebted to Hooman Attar, Kate Hughes, Linda Matula, and Luc Peters, who all held my hand at some stage during the project. Without their help this mind-expanding, kick ass, and in many ways transformational journey into the depth of scholarly knowledge and personal self-awareness would not have been possible. I hope that one day I will be able to return their generous intellectual and personal support. I would also like to offer thanks to my fellow MGSM PhD colleagues and readers who have contributed with time, energy and kind words.

Belinda, Kristina, and Linda have contributed to the completion of this thesis in more ways than they can imagine. Thank you for staying with me when the going got rough. For your patience and kind words, thank you to my friends and family.

For Annette and Viktor.

ABSTRACT

This thesis considers the implications of introducing the concept of *Verfremdung* to the field of management education. While not in this specific term, but as its conceptual idea, variations of *Verfremdung* can be found in Socrates' irony, the Russian Formalists' literature and Bertolt Brecht's epic theatre. I pay particular attention to the latter because Brecht developed his account of *Verfremdung* – albeit unscholarly – with a focus on education and knowledge, and the promotion of independent thinking. The investigation of Brecht's *Verfremdung* then, explores the proposition that artful interventions provide interruptions, leading to learning experiences that are characterized by critical reflection and a shift of taken-for-granted assumptions.

I begin with an investigation of the problematic relationship between habits/routines and traditional business school education, and consider its implications. It is problematic because, on the one hand, habits are necessary to facilitate everyday tasks, while on the other they inhibit active awareness of these actions. By emphasizing the learning of techniques and frameworks, management education contributes to the sometimes overly trusting reliance on these tools in organizational practice. I argue that this kind of instrumental training needs to be complemented with the development of critical thinking skills, which motivate and enable the questioning of existing habits. The past decade of economic and political turbulences has demonstrated that an over-reliance on established knowledge and its uncritical acceptance can have devastating effects.

This observation emphasizes the need for management learners to engage in critical reflection, and I turn to Jack Mezirow's transformative learning theory to bridge Brecht's *Verfremdung* to the adult learning context of business schools. Mezirow ascertains that the quest for development is an inherent human capacity, and that perspective transformation is at the core of this endeavour. I explore the potential of the arts to encourage a different form of knowing, and focus on Brecht's *Verfremdung* in particular. The most basic objective of *Verfremdung* is to make the familiar appear unfamiliar. Which means in terms of management education that learning- or course-content is stripped of its instrumental simplicity and accessibility, which can act as the trigger event that stands at the beginning of the transformative learning process. By not providing pre-made explanations and established management perspectives *Verfremdung* creates a space for learners to shift the focus towards elements that were previously hidden.

While Brecht engaged *Verfremdung* in the context of theatre it has proved to be a versatile concept that is not restricted to a specific form or art. Capitalizing on this adaptability of *Verfremdung* I explore films as its medium, arguing that visual communication provides a more immediate access to knowledge. Films also offer the familiarity that is a prerequisite for creating strangeness in a Brechtian sense. Teaching with films has become increasingly popular with educators from a range of disciplines. In management and organization studies however, two major strands have developed a more structured approach, namely film as illustration and film as thesis, which have been described as the process of illustration of essence that deviates from the often reductionist view of management textbooks. Although

valuable for supplementing textbook learning, illustration of essence has a determined object of reflection – often a management concept or theory. Based on the assumption that this form of teaching/learning does not lead to critical reflection I suggest the inclusion of *Verfremdung*, coining it film as *verfremdung*. The implications of this extension are explored with a case study of an MBA change management course.

By positioning *Verfremdung* in management education, this study rethinks the didactic differences between teaching with the arts and arts-based teaching. While the latter often already knows what it wants/needs to teach, this thesis emphasizes that *Verfremdung* does not provide knowledge in the traditional sense but instead invites learners to think for themselves.

This insight relates back to existing assumptions about the developmental potential of *Verfremdung*: increases awareness, initiates activity, and motivates change. The original contribution of this thesis however, is that it provides a more differentiated view on the effects of *Verfremdung* in management education. While the study demonstrates that *Verfremdung* initiates critical reflection that leads to perspective transformation, it also highlights that this is not a cause-effect relationship. Not all business school students are prepared to accept a curriculum that targets transformational learning.

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INTRODUCTION

Examine carefully the behaviour of these people:
Find it surprising though not unusual
Inexplicable though normal
Incomprehensible though it is the rule.
Consider even the most insignificant, seemingly simple
Action with distrust. Ask yourself whether it is necessary
Especially if it is usual.
We ask you expressly to discover
That what happens all the time is not natural (Brecht cited by Wright 1989, p. 49).

Thus was the German playwright's instruction for his audience. In Bertolt Brecht's theatre neither actors nor audience got away with an uncritical attitude. The actors were meant to be demonstrators, turning the audience into active observers, who practise their critical thinking skills.

Problem Situation

The academic interest in critical thinking skills has seen a constant ebb and flow in recent decades. Currently it is at its zenith, which will not come as a surprise to anyone who has been following the world affairs. The world has experienced numerous turbulences in the past ten years: global financial crises, the oil spill in the Gulf of Mexico with devastating consequences that will last for decades, and Europe on the brink of another recession at the end of 2011. Conventional wisdom – once again – has reached the end of its rope but the majority of individuals and organizations are still caught in their routine and habitual ways of doing business. Habits provide the comfort of the familiar, and can lead to resistance to change, even when it is highly needed. This situation clearly indicates a need for change in how individuals, and consequently the organizations they work for, approach complex problems. Holistic thinkers – individuals who are able to harness established knowledge while at the same time continuously questioning and revising it – are usually superior problem-solvers, producing novel thoughts and ideas. However, for the most part business schools don't contribute to the development of critical reflection – which oscillates between existing knowledge and its revision – but instead teach skills and frameworks that are based on a

reductionist view of the world. Based on this point of departure a refocus of the pedagogical lens on critical reflection is especially needed.

The *scientification* of management education that has led business schools to focus on functionality and praxis-based skills neglects the need to break through habitual thinking patterns. These detrimental circumstances have not gone unnoticed by business scholars. The latest Carnegie Foundation Report (Colby et al. 2011) for example, which provides the most recent account of the state of undergraduate business education, has found that for business students “who tend to focus very intently on career preparation, general education courses are especially likely to be seen as marginal to the real purposes of their education” (p. 164). I have had this experience while teaching undergraduate business students in Australia. The majority of learners attend these courses either because it is part of the degree package and/or because they have already started mapping their career and are looking to gain particular skills. Many undergraduate students hold part-time jobs and keep their eyes on employability and early career progression, which leads them to expect to learn a set of tools that can be used to simplify and solve problems.

When management is perceived and presented in an instrumental way that suggests that it is a practice whose problems can be solved with right-or-wrong answers, it provides a false sense of security in two ways. Often, degree-qualified students believe that they have the abilities to solve complex problems with the tools they have learned – after all, they have spent three years learning these skills. Additionally, organizations believe that managers have the skills that are needed to ensure the business’s progression and, at times, survival. This self-perception of learners and their organizational reception is not only flawed because functional skills don’t solve complex problems, but is also partly responsible for the turbulences that the world of business and politics is experiencing. Freire (1996) coined the term *banking education* to describe such a teaching and learning environment that focuses on depositing knowledge in students’ minds as if it was an object. This kind of education feeds to learners’ obsession with functional and tangible knowledge, which is a behaviour that has been described by Fromm as *necrophily*:

While life is characterized by growth in a structured, functional manner, the necrophilous person loves all that does not grow, all that is mechanical. The necrophilous person is driven by the desire to transform the organic into the inorganic, to approach life mechanically, as if all living persons were things ... Memory, rather than experience; having, rather than being, is what counts. The

necrophilous person can relate to an object ... only if he possesses it; hence a threat to his possession is a threat to himself; if he loses possession he loses contact with the world (Fromm cited by Freire 1996, p. 58).

Fromm's portrayal of the *necrophilous* person is an apt description of the state of the majority of management learners. The learning of skills is, of course, not *bad* as such but it becomes problematic when it holds students back from extending their thinking scope and leads them to view their existing knowledge as a universally applicable instrument. Colby et al. (2011) have found that, contrary to students of humanities, business students struggle to deal with the ambiguity of open-ended questions – but ambiguity and uncertainty is exactly what managers will encounter throughout most of their working life.

While postgraduate management students, which includes MBA participants, usually have had several years of work-life exposure, their learning expectations are similar to that of undergraduate business school students. Guided by business schools' promise to help learners to "develop a strategic, global, and sustainable management perspective and skills that are inherently practical" (MGSM webpage¹), the majority of MBA students focus on the last part of this statement. Practical skills are what undergraduate students expect, and this is the same for postgraduate students. MBA students have the work-life experience that is necessary to engage in critical reflection, yet they prefer instrumental knowledge. Argyris (1991) found that managers can be particularly brittle learners because, not only do they find their skills and knowledge sufficient based on past success, but they also deliberately avoid the ambiguity that critical reflection releases because they haven't been taught how to deal with it. Returning to the earlier observation that critical thinking skills and a willingness for making own interpretations are required but not included in the traditional business school curricula, it stands to reason that the solution to this dilemma can't be found within the traditional business education context. Weick (2007) has suggested that in order to "gain lightness and leave the heaviness of outdated concepts and assumptions behind one has to drop the tools of traditional logic and rationality" (p. 15). The observed *scientification* of management education has been established for decades and cannot be expected to be changed with a coup-d'état. Instead the process of adjusting traditional business school curricula is more a matter of the proverbial 'little strokes fell big oaks'. The continuous stream of scholarly critique that is directed against the reductionist view of business school

¹ <http://www.mgsm.edu.au/mba-and-postgraduate-programs/teaching-method/>

education in general, and MBA degrees in particular, has carved the path towards the reintroduction of the humanities in management education. Colby et al. (2011) suggest that for the integration of the liberal and business learning – they specifically address undergraduate business curricula – “institutional intentionality” (p. 170) is required. Intentionality on an institutional level is necessary to ensure a lasting integration, and prevent the limited shelf life that often constitutes the nature of individual attempts.

The past decades have seen numerous scholars include the arts in their teaching in order to provide the *necrophilous* management learner with the space to experience different forms of knowing. Supporters of the epistemological value of art suggest a range of benefits that revolve mainly around its capacity to reach different spheres of the mind, which are otherwise inaccessible. While many arts-based methods are still used in a ‘trial-and-error’ mode, the adaptation of numerous artforms in the field of business studies has experienced some form of structure through the organizing of the various available methods (see for example Taylor & Ladkin 2009; Adler 2006; Darsø 2004). Marcuse (1978) for example believed that art “contribute[s] to changing the consciousness” (p. 32) and, while numerous arts-based teaching approaches are based on this assumption, some methods have become heavily instrumentalized, and tilt towards the functional end of management education. The use of films is one example that has been organized in Taylor and Ladkin’s (2009) typology of arts-based methods as “illustration of essence”, which means that it “enables participants to apprehend the “essence” of a concept” (p. 56) better than with textbook learning. While this kind of teaching is still based on the artform of film, its objective is clearly defined and, in comparison to the non-instrumental effects that art experiences can offer, limited. Schein (2001) has suggested that “art and artists stimulate us to see more, hear more, and experience more ... [and that] art does and should disturb, provoke, shock, and inspire” (p. 81). If business schools are to integrate a more humanistic approach that focuses on complexity instead of simplifying problems, art in its non-instrumental form needs to be further incorporated into the curricula.

Purpose of Study

The present research sets out to explore the appropriation of Bertolt Brecht’s *Verfremdung* for management education. On the most elementary level it will explore the question: *what is the effect of Verfremdung in management education?* The arts are an elusive concept, and

attempts to define what 'art is' and what 'it does', have filled countless books and volumes without a conclusive answer. A similar vagueness surrounds Brecht's *Verfremdung*. Brecht (in Willett 2001; 1970a and others), while not a scholarly educator, wanted to educate the audience. He developed his concept of *Verfremdung* to interrupt habitual seeing and thinking, and to uncover that the world and its conditions are created by humans and thus can be changed by humans. "The task of art today is to bring chaos into the order" (Adorno cited by Kuspit 1975, p. 322), hence *Verfremdung*, as one artistic element, represents conditions that the *scientification* of management education tries to contain. Routine-based acting and thinking are not actively challenged in management education because it not only simplifies the learning, which contributes to economical efficiency, but also provides certainty and structure. Because *Verfremdung* unsettles, and creates a temporary state of incomprehension, it challenges the learner.

From a developmental perspective, challenges are a necessary condition to direct the learners' attention inwards – to critically reflect on why a certain condition is found challenging and which underlying assumptions lead to the feeling of contradiction (Louis & Sutton 1991; Piaget 1977; Schütz 1964). Critical reflection deals with challenges, not only in the formal learning environment but also in the professional and personal life of individuals. Because *Verfremdung* is under-theorized in management education, for the present study it was necessary to situate this inter-arts-element in a theoretical framework of adult education. Mezirow's (2000; 1997; 1991; 1990) transformative learning theory has a specific focus on how learners transform their consciousness or in other words experience a change of perspective. It becomes obvious that the objectives of transformative learning are different from those of the prevalent informational learning in management education. Unrelated, but similar to Brecht, Mezirow has suggested that a trigger event is necessary to precipitate a perspective change that is guided by the realization that existing assumptions and frames of references have become inadequate. If art, including *Verfremdung*, has an unsettling capacity, as has been suggested by numerous scholars, it stands to reason that it contributes to a higher level of learning.

The purpose of the study then, is threefold. First, it explores what we can learn about Brecht's *Verfremdung*. The limitation to Brecht is necessary because *Verfremdung* is a concept that has seen numerous variations, from Socrates' use of irony to the Situationist's concept of *détournement*. An exploration of the range of *Verfremdung* as such – while

valuable – was not attempted. By establishing the core characteristics of Brecht's *Verfremdung* the present research makes this elusive concept more accessible for educators.

Second, because *Verfremdung* is situated within the artform of film, the study additionally furthers knowledge of the pedagogical use of film in management education. Using films or excerpts of movies for teaching purposes has become a popular teaching method in various scholarly disciplines, including management education. Two major strands presently dominate this field: *film as illustration* and *film as thesis*. The present research adds to this field of knowledge by developing film as *verfremdung* as a suggestion for creating complex learning situations. Yet, the focus is not so much on the medium of film but instead on the potential of *Verfremdung* to initiate critical reflection.

Third, bridging *Verfremdung* to the field of management education with Mezirow's transformative learning framework, the results of the study will advance knowledge of the use of arts for this form of higher-level learning. Numerous scholars ground their use of arts-based teaching methods in the assumption that art encounters increase awareness, and can have intense effects on students' experience, such as the examination of their assumptions. This thesis will contribute to this discussion with further clarification between the pedagogical use of art in an instrumental way and art in a non-deterministic manner. The present exploration within its educational framework attempts to ascertain whether arts-based teaching in general and *Verfremdung* in particular can be linked to transformational learning.

Thesis Structure

In this thesis I investigate Brecht's concept of *Verfremdung* in depth, and pursue this research with a focus on *Verfremdung*'s viability to contribute to critical reflection. I begin my investigation with establishing how habitual ways of thinking and acting, which are encouraged by traditional business school curricula, impede thinking and development, and how the often technical knowledge focus of business schools limits itself to informational learning instead of introducing learners to critical reflection, which can lead to perspective transformation. For some time arts-based teaching methods have been found to be a possible antidote against this focus on technical skills and knowledge. My focal point for this chapter is to establish Brecht's *Verfremdung* in depth, and to introduce Mezirow's transformational learning theory in order to bridge *Verfremdung* to the world of management education.

Because *Verfremdung* is not an artform in itself but an umbrella concept that can relate to various artforms, Chapter 2 provides the context of films for *Verfremdung*. The initial literature review examines the current body of knowledge in support of the advantages offered by the pedagogical use of film. I continue this thread with an account of the two major streams, film as illustration and film as thesis. I then suggest a third theme, film as *verfremdung*, based on Brecht's concept of *Verfremdung*, as an addition to this field of research. The proposal for film as *verfremdung* is based on Brecht's assumption that *Verfremdung* creates a temporary state of not understanding, which creates a void that allows learners to surface their everyday habitual ways of thinking and acting, leading to reflective thought.

In Chapter 3 I report on the case study that I conducted in order to explore what effect *Verfremdung*, or to be more precise film as *verfremdung* has. While the initial research design erroneously revolved around quantitative elements of questionnaires, the focus shifted to a qualitative analysis of the learning journals of course participants once the epistemological error became apparent. While this mistake is regrettable, I have included its description in this thesis to illustrate my learning process and because it furthers insight about *Verfremdung*. The results of my examination of the learning diaries are reported in Chapter 4.

The investigation surfaced three different response patterns to film as *verfremdung*, which will be discussed in detail in Chapter 5. I will contextualize the responses by further probing into students' predispositions and what they mean for management education. The main focus however, is the investigation of film as *verfremdung* pertaining to if and how it corresponds to critical reflection and Mezirow's concept of perspective transformation.

1. Shifting Management Education

Management education is a field of practice that requires continuous adjustment and improvement if it wants to remain relevant not only in the fast-paced world of business but also as an academic discipline. It has received attention from a multitude of scholars in recent decades (Cunliffe & Linstead 2009; Gosling & Mintzberg 2006; Mintzberg 2004; Perriton 2004; Wankel & DeFillipi 2002; French & Grey 1996; Roberts 1996; Argyris 1982; and others). This chapter describes how habitual ways of thinking and acting, which are encouraged by a focus on routine-based applications of frameworks in traditional business school curricula, impede thinking and development, and how the often technical knowledge focus of business schools limits the possibilities of transformational learning and reflection. It suggests critical reflection is a crucial element in organizational and management realities because, as the latest economic and political turbulences indicate, existing methods and approaches seem to be flawed and inappropriate. For some time arts-based teaching methods have been found to be a possible reply to this focus on functionality in management education, and I extend this specific body of knowledge with the concept of *Verfremdung*. I structure the argument as follows. First, I discuss the idea of habits based on Alfred Schütz's notion of everyday routines, and their implications on management education. I then present an overview of Jack Mezirow's Transformational Learning theory and how arts-based teaching methods are believed to assist its realization. Third, after providing an overview of the historical roots of the concept of *Verfremdung* and highlighting its two major strands, I suggest that Brecht's *Verfremdung* supports transformational learning and acts a possible antidote against 'un-reflectiveness'.

The Influence of Habits

In personal as well as professional life, most activities attended to by humans are governed by habits. Greeting another person, buying groceries, answering the phone, conducting a meeting – the list of everyday tasks and social situations that need routines in order to function is endless. Without these automatic cognitive modes one would have to continually reason anew about the most ordinary of actions, which would make life unnecessarily challenging. Naturally the expectations for certain behaviour do vary in different cultures. Anyone who has ever visited a foreign country where the local culture is distinctly different

from home can relate to the chaos that occurs when one's habits and routines are not applicable. Taking a taxi, shopping for groceries, queuing for tickets – all those familiar things suddenly appear strange and often difficult. On vacation this strangeness is a welcome and often specifically sought-out deviation from the ordinary because the familiarity of the everyday makes life appear dull and less enjoyable.

Similar to this example of a traveller, Alfred Schütz (1944) illustrated the dominance of 'thinking as usual', with the help of a stranger who tries to make sense of behaviour patterns that are distinct from his own. 'Thinking as usual' is a process that, identical to habitual thinking and acting, requires minimal cognitive effort. This kind of thinking is enabled by what Schütz (1944) called:

Trustworthy recipes for interpreting the social world and for handling things and men in order to obtain the best results in every situation with a minimum of effort (p. 501).

These 'recipes and rules of thumb' are directly connected to the various sources of information on which humans rely. Investigating social realities and experiences, Schütz pointed towards the different modes of obtaining knowledge. First, information can be collected through direct experiences. This first-hand level of collecting information requires a conscious state of mind, which includes a deliberate consideration of consequences, and possible alternatives. Naturally, these first-hand experiences are not always possible. One only has to think of extraordinary actions, like flying to the moon, that are currently out of reach for most humans. The majority of people have to make do with reading about these voyages and looking at pictures. Additionally, first-hand experiences are not always necessary or desirable. For example, an individual would not want to swim with great white sharks to confirm the assumption that it is a dangerous, potentially fatal, experience.

While these are extreme examples, they demonstrate that certain restrictions make vicarious knowledge necessary. This indirect or second-hand knowledge can be obtained through various sources. Children receive information initially from their family, at a later stage from school, and when they are grown up the workplace substitutes direct experiences with an established body of knowledge. While it is a necessity, this kind of knowledge can become problematic because it contributes to habitual ways of seeing and acting. Established knowledge, like cultural or religious beliefs, as well as organizational best-practice policies, for example, do not lend itself easily to critical inquiry. Individuals who want to know and test the

reasoning for specific actions are often seen as deviant or troublemakers because they unsettle the flow of routines. While the questioning of first-hand experiences appears to be generally less difficult than that of second-hand knowledge, the former are nonetheless prone to habituation. For example, performance pressure or time-constraints at work often force employees to rely on personally tried and tested methods or strategies, without considering their appropriateness. They depend on what Schütz (1943) called 'cookery-book knowledge' and routine-based actions to meet their workplace demands.

Habits and routines in everyday life then are a double-edged sword. They help individuals to accomplish tasks without major calamities, but they can also negatively manifest a given status quo and prevent reflection where it is appropriate. This lack of inquiry is not only the case on a personal, micro level, but also on the meso level of organizations, who can and do suffer from internalized routines and expectations in multiple ways. One possible negative outcome of habitual actions for example is a high level of resistance to organizational change initiatives because the comfort and perceived safety of the familiar limits individual openness to structural modifications. The need for openness to change is dictated to organizations by various factors of the present-day economy. Increased competition and volatile markets require creativity and innovation. Holistic thinkers individuals who are able to harness established knowledge while at the same time continuously questioning and revising it are usually superior problem-solvers, producing novel thoughts and ideas.

Two Key Issues in Management Education

While innovative and creative thoughts are desirable and often required, traditional business schools often create the opposite effect by manifesting and encouraging the habitual. The following paragraphs investigate two key issues of management education that relate to automatic thinking and acting. The first concern is the course content, which often is too instrumental and focuses on functionality². The second, related, issue refers to external funding that restricts intellectual/academic freedom, and thus influences the content.

The shift towards a financial focus occurred predominantly in the early 20th century when business schools took on more businesslike than educational features. When the degree of

² With functionality I mean skills and knowledge that have direct business praxis relevance, or at least give the impression of direct applicability.

Master of Business Administration (MBA) was at its value peak in the 1980s, 1990s, and still in the early 2000s, it constituted a precious currency for securing a highly paid position in one of the leading financial, law or consulting firms. The yearly Financial Times ranking of MBA programs was, and often still is eagerly anticipated: by current students to see what kind of salary they can expect if their school is in the top five; and by future students to aid their decision-making process before committing to such a costly³ program. More often than not it was for employers then a question of which school students' attended and not what their actual individual capabilities were. Students had become paying customers, who needed to learn certain skill sets to be able to apply management tools and frameworks.

This technical approach to business school education has been supported for decades, and Cyert and Dill (1964), for example, already voiced this tendency in the mid-20th century when they saw an instrumental approach as a necessity for the quality of business faculties. One of their three basic missions for business schools was the requirement to transfer knowledge to students that would equip them with management skills and help them to apply management frameworks. Management efficiency – and not reflective practice – was sought. This mission corresponded to the positivist history of economic philosophy of the early 20th century, where streamlining and efficiency were developed to increase productivity or, as Mintzberg (2004, p. 7) expressed it, “the MBA, is a 1908 degree with a 1950s strategy”.

However, management theories of analyzing and synthesizing workflows that are aimed at improving efficiency and productivity, like Taylorism for example, have long ceased to be the best way. The economic environment, particularly since World War II, has changed considerably, and to base management education – any education for that matter – on assumptions that have been outdated by advancements of a particular field does not match with the forward-driven reality of the world. In line with analytical management theories, habitual actions are fostered because they increase efficiency by decreasing the necessity to actively think and reflect. Traditional management education produces well-trained graduates with an artillery of routines of analysis but no skills for thinking through problems for themselves (Goshal 2005).

³ For example, in 2009 the following tuition fees were charged: INSEAD (Paris) €51.000, London Business School €50.000, which IESE (Madrid) outranks by charging €67.900 (Top MBA website 2011).

Argyris (2002; 1992; 1991; 1982) is one of the leading scholars, who have looked at the dilemma created by traditional management education. Namely the issue of learning barriers through an increase in what he called single-loop learning and a decrease in double-loop learning. While Argyris' intricate learning concept deserves more than a brief mention, at this stage it suffices to say that single-loop learning looks at solving problems with easily available routine knowledge, whereas double-loop learning aims at a complex process of reflection on the problem, and revisits the basic assumptions which guide the decision-making process to solve the problem. Because traditional management education is mostly directed towards functional knowledge, which does not equip future managers with the critical thinking skills necessary to tackle complex problems in an innovative way, single-loop learning can contribute to a variety of problems for organizations. Argyris argues that when single-loop-based decisions go wrong, managers – and also non-managers – become defensive and stop learning from mistakes, which in turn inhibits organizations in their progress. These learning barriers can be the result of “mental or physical discomfort” (Gray 2007, p. 496) that can occur when mental models about how the world works or is ought to work are contradicted. In Argyris' case, managers' defensiveness is the reaction to the discomfort of being wrong and having their mental model of the world disillusioned. Such barriers are difficult to remove because the predominance of scientific knowledge approaches that aim to reduce complexity can disable individuals' capacity for accepting multiple realities.

Numerous scholars have noted this bias towards an analytical, technical focus on management education, resulting in a lack of room for the development of complex reasoning skills (Starkey & Tempest 2009; Welsh & Dehler 2007; Gabriel 2005; Goshal 2005; Parker 2002; Pfeffer & Fong 2002; Dehler, Welsh & Lewis 2001; Reed & Anthony 1992; Porter & McKibbin 1988; Schön 1987). Mintzberg (2004) voiced the most articulate critical assessment of the dilemma of MBA education by looking, first, at what he considered the wrong business school clientele undergraduate students without prior work experience and, second, at what is being taught, namely techniques and tools.

For many career-driven undergraduate students an MBA has the allure of a short cut to becoming a manager. But because those students have no significant real-world experience they explicitly expect tools that aid them in solving managerial problems in a standardized

way. This approach to management education, described by Paulo Freire⁴ (1996) as the 'banking' approach, fails to ask questions which go beyond the technicalities:

The outstanding characteristic of this narrative education, then, is the sonority of words, not their transforming power. "Four times four is sixteen; the capital of Pará is Belém" The student records, memorizes, and repeats these phrases without perceiving what four times four really means, or realizing the true significance of "capital" ... that is, what Belém means for Pará ... (p. 52).

Such an educational banking style then, *deposits* certain views of the social and organizational world, which subsequently hinder the creative thinking process that is required to test and adopt different perspectives.

This critique of traditional management education is not to suggest that technical content is superfluous. Managers need certain skills, such as conducting a SWOT analysis or being able to read a balance sheet, for example, in order to carry out their work (Roberts 1996). However, an overemphasis on technical content leads students to take up information and regurgitate an exact replication of it during assignments and exams. A critical investigation of the provided course content is usually not supported and sometimes not even desired. This form of teaching and learning results in mostly empty knowledge, which leads to a dependence on existing concepts for problem solving. The complex and interesting 'why' questions remain unasked and unanswered, and although students are capable of repeating the provided information they are usually unable to use it in a constructive way. The context for the content is missing, which contributes to a too simplistic view of management challenges.

Most conventional business school curricula support this form of learning and teach student-managers how to apply prepared instrumental knowledge to defined problems, which can be practised with case studies for example, and which contributes to what Schütz (1943) would have surely counted as 'cookery-book knowledge'. Considering the current economic chaos, the breakdown of major corporations and the generally fast pace of the world, a pedagogical case study approach by itself does not seem to cover the needs of today's organizations as

⁴ Freire was committed to educating and thus empowering oppressed peasants in Brazil. Naturally he did not mention management education but I have taken the liberty to extrapolate his ideas to the field of business schools. I believe that, even though managers do not suffer from such an obvious form of oppression as Brazil's peasants, they do lack intellectual emancipation.

too often “cases simply recycle traditional assumptions” (Starkey & Tempest 2009, p. 582). Yet, despite their tendency for oversimplification, the use of case studies should not automatically be equalled with bad teaching but instead be viewed from the perspective of their context. For example, undergraduate students without previous organizational exposure benefit from case studies because they provide them with practical examples, and give them an idea about their future field of work. And for adult MBA learners, who enter these programs and hold a considerable amount of years of work-experience, case studies in their current form would probably be better used as access points to specific fields of knowledge instead of providing the knowledge for this field. However, to avoid producing habitual patterns of decision-making and argument, case studies need to be supplemented with the teaching/learning of critical thinking skills. The argument against case studies, then, is related to the developmental gap they create or, in other words, they are more criticized for what they don’t do instead for what they do.

The second issue of management education, in addition to the described content bias, is the development that a large number of business schools are competing for partnerships and funding from private enterprises, which has led to a significant focus shift. In the past it has been mostly a case of the natural science faculties producing industry-requested research, whereas now the same is happening in business schools at an increasing rate (Ambos et al. 2008; Hopwood 2008; Prince & Beaver 2004; Crainer & Dearlove 1998; Roberts 1996). Macquarie Group⁵ in Australia, for example, has initiated a Master of Finance degree in corporation with INSEAD business school, where the latter delivers to Macquarie’s curricular requirements. The corporation is thus able to develop their perfect employee, with specific knowledge and skills, ignoring anything outside this range. Those partnerships affect the intellectual quality and breadth of research, as it is no longer produced merely for the academic community and to advance knowledge, but is specifically tailored for industry needs and wants. Looking at this moulding of custom-made, best-practice employees, it appears peculiar that business schools advertise with slogans like ‘expand your thinking’⁶ or ‘transform yourself’⁷.

⁵ Macquarie Group is one of the largest financial service providers in Australia with numerous operations overseas.

⁶ INSEAD.

⁷ Wharton.

But naturally such collaborations have their merits, such as access to better resources for the whole faculty, for example, or a higher profile through real-world value. However, management education has become part of a self-fulfilling prophecy, in the sense that organizations pay for the education of their managers, and business schools are willing to deliver what the well-paying organizations expect as universities strive to increase and retain their numbers of clients/customers, all of which leaves an uneasy aftertaste on the academic palate. First, an increase in industry funding often means a decrease in academic autonomy. And, second, increased external funding contains the risk of business schools producing one-sided research. It is one-sided in the sense that the intellectual focus might shift to one specific field of high interest for organizations, in order to attract more or continuous funding instead of pursuing an interest in the whole breadth of management issues. As explicated in this chapter *expansion* and *transformation*, while highly desirable educational characteristics, are not yet business school reality. The *scientification* of management education has led business schools to focus on functionality and praxis-based skills, neglecting the need to break through habitual thinking patterns.

Critical Reflection and Perspective Transformation

By investigating the relationship between habits and business school curricula the previous discussion has highlighted a need for adjusting the prevalent objectives of management education. The following part of this chapter argues that the call for a new pedagogy, which has been voiced by management scholars for some time, should be answered with a renewed focus on critical reflection.

A suggestion for critical reflection will strike most management educators as not particular novel because Critical Management Education (CME)⁸ scholars (Perriton 2004; Reynolds 1999; Mezirow 1990, amongst others) have written extensively about the subject of critical reflection and its pedagogical implications. However, a look at most contemporary MBA curricula suggests that talk about reflection still outweighs the actual practice of reflection. Carol Rodgers (2002) has noted the inflationary talk of reflection suggesting that “[i]n becoming everything to everybody it has lost its ability to be seen” (p. 843). I perceive her comment as a suggestion that readjusting the pedagogical lens on *how* to achieve critical

⁸ The main concern of CME is the investigation of process and content issues in connection with management education and development programs (Perriton 2004, p.126).

reflection is more crucial than further hypothetically theorizing about *why*. However, before continuing with the discussion it is necessary to briefly clarify the differences between reflection and critical reflection. Reflection is generally used as:

a generic term for those intellectual and affective activities in which individuals engage to explore their experiences in order to lead to new understandings and appreciation (Boud, Keogh & Walker 1985, p. 3, cited by Mezirow 1991, p. 5).

That is to say, through the process of reflection, knowledge or information is re-assessed and, if necessary, corrected. Reflection is usually applied when existing habits and routines fail to solve a problem and new solutions are required. This kind of reflection can be found in educational settings that base their training upon tradition and authority, and where critical inquiry is not specifically promoted. Mezirow (1998a) noted that reflection not necessarily discriminates its subject, which means that for reflection “an assessment of what is being reflected upon” (p. 186) is often not part of the process. By using reflection only for immediate problem-solving, traditional management education misses the opportunity to transform how managers view their work. Critical reflection, on the other hand, is a way of rigorous thinking that demonstrates:

a commitment to questioning assumptions and taken-for-granted, ... [and] an insistence on foregrounding the processes of power and ideology that are subsumed within the social fabric of institutional structures, procedures, and practices (Reynolds 1999, p. 538).

This form of reflection also occurs when inherited recipes for problem-solving no longer work, but the difference lies in the subject of reflection. During critical reflection, routine-based ways of thinking and the analysis of everyday problems are pushed to the back of the mind, and instead one’s assumptions are being analyzed on a more abstract level (Brookfield 2002). Considering the impact that managers have on the lives of other people, critical reflection should be a standard element in any contemporary business school curricula.

The main difference between reflection and critical reflection then is the direction of focus (Figure 1). In other words, reflection is directed externally at something⁹, a problem for example, whereas critical reflection is additionally directed internally at oneself, that is, one’s

⁹ A friend of mine made an illustration of reflection after we spoke one night about the difference of reflection and critical reflection. She works in the health industry, and in nursing services reflection is a reoccurring theme. Critical reflection however, is not much observed. I have attached the illustration as Appendix 1.

presuppositions that are then followed by a critique of the underlying assumptions towards a problem.



Figure 1. Reflection and critical reflection: different direction of focus

Critical reflection has its origins in Critical Theory, which has been advanced most notably by the various scholars of the Frankfurt School. While I cannot do justice to the complex concept of Critical Theory in this limited space, it is important to note that, despite internal differences, the writers of the Frankfurt School held a common interest in the connection between the individual and society, and foremost the emancipation of the individual. For critical theory the world is not natural, but instead is a collection of man-made traditions, rules and organizations. Social inquiry is meant to look beyond these artificially created entities that represent a current state, explore possibilities and imagine how things could be instead. Its Frankfurt School roots mean that critical reflection always contains an element of emancipation or, in other words, that it not only aims at deliberating on alternatives but also takes an interest in the underlying political and social assumptions. For managers it is particularly important to uncover and review these suppositions because organizations are permeated with politics and power relations (Buchanan & Badham 2008). Organizational power usually consists of multiple layers containing formal and informal power bases that form an intricate net, which is not always easy to disentangle.

The banking approach to education prevents critical engagement with the learning/teaching content. Even when it encourages reflection, the learning remains within pre-existing perimeters. While reflection on problems and the process of solving them is an important element of education, it fails to break the active meaning making frames or meaning schemes. Critical reflection, on the other hand, can act as a magnifying glass to detect influencing structures and instigate a questioning of organizational or societal norms that foster particular circumstances. Hence, it is necessary to educate managers in a way that

deliberately supports their ability to think critically about the process of organizational power and ideology. This type of reflection is one of the main elements of Mezirow's (1998a; 1998b; 1991; 1990a; 1990b) transformative learning theory, which, as a constructivist theory of adult learning, focuses on perspective transformations that break through defined perimeters of knowledge.

Advocating this kind of reflection in management education, numerous scholars (Gray 2007; Carson & Fisher 2006; Hay, Peltier & Drago 2004; Densten & Gray 2001; Katsioloudes & Tischio 2001) have used Mezirow's theory, or part thereof, as a stepping stone for their investigations of reflective tools or arguments for critical thinking. Those scholars' objective of reclaiming and raising critical thinking for management education is similar to my exploration of one, out of many, possible learning method to foster critical reflection. Following their lead I begin with an analysis of Mezirow's transformative learning framework to then subsequently steer the discussion towards arts-based teaching/learning methods.

Transformative Learning

Mezirow is one among other adult education¹⁰ theorists who were concerned with the parameters of effective learning. Paulo Freire (2005; 1996) for example was concerned with emancipating underprivileged learner groups through education. Through the process of *conscientization* he was helping these learners to liberate themselves from oppression. Robert Boyd's (1988) concept of individuation is concerned with the emotional-spiritual dimension of learning, and is grounded in the tradition of psychoanalytic thought. Boyd was particularly interested in how learners experience learning, and how self-knowledge is mediated through symbols (Dirx 1998). Mezirow's transformative learning theory that focuses on perspective transformation was found a particularly fruitful framework for the present research for several reasons. First, while Mezirow deals with emancipatory interests among others, his focus is directed primarily at the individual learner. This individual-centred focus is most congruent with the epistemological assumptions of this study. Second, his theory of perspective transformation allows a description of how learners change their

¹⁰ Knowles (1973) had coined the term 'andragogy' in order to distinguish adult education from pedagogy, which is concerned with educating children. However, he found that the boundaries between self-directed (adult) and dependent (child) learning depend on the learner. Hence, for the present study I use the term 'pedagogy' synonymously with adult education.

consciousness. The present research subject – Bertolt Brecht’s *Verfremdung* – has been prescribed with a capacity to increase critical awareness and arouse activity. Because of the experience similarities between *Verfremdung* and perspective transformation, I appropriate Mezirow’s theory to bridge *Verfremdung* with management education. Third, this thesis argues that business school curricula can benefit from a renewed interest in critical reflection, which is intimately connected to Mezirow’s concept of perspective transformation.

In distinguishing between instrumental learning (learning how to predict, control and manipulate the environment), communicative learning (understanding the meaning of what is being communicated), and reflective learning (understanding oneself and one’s perspective), Mezirow¹¹ (1991) suggests that only the latter offers the opportunity for perspective transformation, which for him is the essence of adult education:

Transformative learning results in new or transformed meaning schemes or, when reflection focuses on premises, new or transformed meaning perspectives – that is, in perspective transformation. While not all adult education involves reflective or transformative learning, reflective, and hence transformative, learning surely should be considered to be a cardinal objective of adult education (p. 111).

Mezirow’s adult learning theory is concerned with:

how we learn to negotiate and act on our own purposes, values, feelings, and meanings rather than those we have uncritically assimilated from others-to gain greater control over our lives as socially responsible, clear-thinking decision makers (2000, p. 8).

For Mezirow emancipatory adult education has the task of supporting learners to think for themselves, to gain greater control and to achieve greater freedom from external influences that might impact their views and actions. These goals are in line with Freire’s (2005; 1996) plea for emancipatory education that steps away from the banking approach, and towards what Langer (2000; 1997) calls mindful learning, which is open to new information and perspectives, and questions previously established categories. The emancipatory outcomes of this kind of transformative learning are for Mezirow a perpetual and natural progression. For

¹¹ While Mezirow bases his distinction of instrumental and communicative learning on Habermas, who was affiliated with the Frankfurt School, he points out that he is not following the Frankfurt School agenda, which presses for social and political changes.

him it is a 'condition of being human' to "learn to make our own interpretations rather than act on the purposes, beliefs, judgments, and feelings of others" (Mezirow 1997, p. 5).

Despite emancipatory education suggesting a political grounding, Mezirow's theory is sufficiently broad that it can be applied not only to education that strives for political outcomes but also to management education, which equally requires emancipation from instrumental learning. This approach with its failure to value social and political action, and instead focussing on the individual dimension of learning has been criticized (Newman 1994; Tennant 1993; Collard & Law 1989). However, this critique overlooks the fact that Mezirow's theory offers scope for social and political action by providing the learner with the necessary understanding that can become the catalyst for social changes. In his early writings he established that:

[t]his involves an interest in self-knowledge, that is, the knowledge of self-reflection, including interest in the way one's history and biography has expressed itself in the way one sees oneself, one's roles and social expectations. Emancipation is from libidinal, institutional or environmental forces which limit our options and rational control over our lives but have been taken for granted as beyond human control (Mezirow 1981, p. 5).

Furthermore, Mezirow responded with an acknowledgment of this critique by suggesting that where appropriate transformative learning should encourage an inquiry into the social forces that shape certain conditions. But for him the experience of perspective transformation is foremost empowerment on a personal level, which can motivate the transformed individual to act on their social world should they chose to do so (Taylor 1998). Defending this possible shortcoming of his theory, Mezirow (1994) proposes, "it seems unsupportable to suggest that every perspective transformation must involve a critique of social oppression" (p. 243), which builds on his earlier observation that "[i]nsights gained through critical self-awareness are emancipatory in the sense that at least one can recognize the correct reasons for his or her problems" (1981, p. 5). This thesis takes up Mezirow's interest in empowerment on the individual level by focusing on how critical reflection and perspective transformation can take place for participants of an MBA change management course.

For Mezirow meaning schemes and meaning perspectives constitute humans' "horizon of expectation" (Mezirow 1988, p. 223). Meaning schemes are "sets of related and habitual expectations governing if-then, cause-effect ... relationships" (Mezirow 1990, p. 2); in other words, they are specific beliefs and attitudes an individual acquires over time. Meaning

schemes are an important part of life and can be valuable for mastering everyday tasks, as Schütz (1953; 1943) has established. They are based on experiences and cultural background, and their influence is pervasive. For example, meaning schemes influence a person's opinion on gay marriage or their country's treatment of refugees, or how a male manager views the work of his female colleague. But they mostly operate on an unconscious level, which means that an individual might not be aware of why they hold a certain opinion or view. As individuals grow and learn, those meaning schemes change, get adjusted or expanded, and generally evolve over time, which Kegan (2009) confirms as "informational learning"¹² "that is aimed at increasing our repertoire of skills ... [and] extending already established cognitive structures" (p. 42).

Meaning perspectives, on the other hand, is the broader concept of "an orienting frame of reference made up of sets of schemes, theories, propositions, beliefs and evaluations" (Mezirow 1988, p. 223). While the change of meaning schemes occurs routinely in informational learning, the change of meaning perspectives or a perspective transformation is less likely to take place in traditional learning settings (Imel 1998; Mezirow 1991). Contrary to everyday reflection that can result in the transformation of one's attitudes and beliefs:

[perspective transformation] is the process of becoming critically aware of how and why our assumptions have come to constrain the way we perceive, understand, and feel about our world (p. 167).

Perspective transformation is the result of critical reflection that is not linearly directed at the problem but looks at how one's personal assumptions influence an issue. This confirms the earlier observation (Figure 1) that reflection has an external focus, whereas critical reflection involves the ability to oscillate between both directions. When learners engage in this form of reflection they acknowledge and observe an external problem, and also direct their attention inwards to assess their suppositions. In other words, reflection looks only at the *what* while critical reflection additionally observes the *why* and *how*. For Mezirow (1997) this inwardly directed critical reflection changes one's 'frame of reference' that "can lead developmentally toward a more inclusive, differentiated, permeable, and integrated perspective" (Mezirow 1991, p. 155). That is to say, individuals who have adapted a critical posture to learning that

¹² For the purpose of this thesis I will use the terms 'instrumental' and 'informational' learning exchangeable because they both describe the process of lower-level learning. Mezirow's transformational learning on the other hand has been identified by Cope (2003) as higher-level learning.

leads to perspective transformation no longer take the world they know for granted. Critical reflection breaks through the reified cultural moulds or mental models that humans use in order to make sense of their world but which simultaneously inhibit their reflective potential. Learners who have benefited from a perspective transformation usually take a constructivist approach to the world after realizing that knowledge is not simply out there to be discovered but it is to be created through questioning and their own interpretations. They have come to appreciate that their values and feelings are constructed, and can be deconstructed. This knowledge puts those individuals in a position of control and provides them with the potential power to adjust the assumptions that support their meaning schemes, that is to say their beliefs and feelings. Through these cognitive adjustments, individuals are enabled to move from one way of thinking and being to another.

The outcomes of transformational learning that are based on critical reflection have not been exactly specified by Mezirow. Despite suggesting an increased critical awareness as described above he usually keeps to the more general expression that “major personal transformations can occur” (Mezirow 1995, p. 45). However, empirical studies have been investigating the outcome element of his transformative theory. Taylor (1998) and Stepniak (2006) have undertaken a literature review of such empirical studies and both found a multitude of outcomes. An increase in personal power has emerged as one characteristic of transformational learning, which is demonstrated in studies by Pierce (1986), Hunter (1980) and others. Respondents in Pierce’s study, for example, reported that being immersed in a transformative learning setting enabled them to explore their personal meaning schemes, that is to say, their beliefs and feelings. This self-discovery created a stronger sense of ownership of their assumptions and actions, and provided them with an increase in personal power. Bailey (1996) found that individuals who experience transformative learning could benefit from a sense of liberation. Her interview study uncovered several benefits of transformative learning and, while some respondents found a sense of liberation from external rules and norms that they had internalized, others “identified and changed distorted assumptions about themselves” (Bailey 1996, p. 123) that held them back from fully exploring their potential.

Other studies (Fewell 2001; Clark 1991) have highlighted that participants experienced the above described notion of moving from one way of thinking and being to another, with the result that they found themselves being different from who they had been previously. After

having performed a transformation in their perspective, they found it hard – if not impossible – to return to their old ways. This finding coincides with Mezirow's (1991) suggestion that:

[a]lthough slippery and subject to diversions and self-deception, the transformative learning process is irreversible once completed; that is once our understanding is clarified and we have committed ourselves fully to taking the action it suggests, we do not regress to levels of less understanding (p. 152).

But outcomes are only one part of perspective transformation, which Mezirow (1995, p. 50) has described as a ten-phase process of transformative learning:

1. A disorienting dilemma
2. Self-examination with feelings of guilt or shame
3. A critical assessment of assumptions
4. Recognition that one's discontent and process of transformation are shared and that others have negotiated a similar change
5. Explorations of options for new roles, relationships, and actions
6. Planning of a course of action
7. Acquisition of knowledge and skills for implementing one's plans
8. Provisionally trying out new roles
9. Building of competence and self-confidence in new roles and relationships
10. A reintegration into one's life on the basis of conditions dictated by one's new perspective.

The dynamics of this process become clearer with Taylor's (1989) description of the transformational learning process, which she described with the following three key phases (p. 197):

Phase 1: Generation of Consciousness

- Encountering trigger events
- Confronting reality

Phase 2: Transformation of Consciousness

- Reaching the transition point
- Shift or leap of transcendence

Phase 3: Integration of Consciousness

- Personal commitment
- Grounding and development

While Taylor based her three-phase model not only on Mezirow but on the transformative learning theories of Bruner, Freire, Kelly, Mezirow and Nichol, it represents a valuable synthesis of the above ten steps and helps to magnify the interplay of an individual's external and internal facilities for transformative learning. Or, in other words, for transformative learning to occur initially there is an external force that leads to an intrapsychic phase, followed by an external expression of the process. Similarly to the transformational learning process, Brecht saw the need to interrupt mechanical causality – meaning schemes, in order to create a state of incomprehension – generation of consciousness, which arouses activity – transformation of consciousness. The last step – integration of consciousness – however, does not have an equivalent in Brecht's description. It stands to reason that Brecht, whose work was in constant flux and state of reinvention, would have appreciated the integration of consciousness merely as a stepping stone for further revision of concepts and beliefs that have become outdated. Returning to scholarly views on transformative learning, Cranton (2002), for example, has coined the description 'spiral-like' to highlight the progressive, non-linear nature of transformational learning. It is more a perpetual discovery process than a fixed-destination trip, and depends as much on the teacher as on the learner.

Additionally, Baumgartner (2001) has suggested that complex issues of feelings, thoughts and interdependent relationships play an important role in the transformational progression. The learner needs to possess a readiness for change and retain an open mind despite challenges that "call into question deeply held personal values and threaten our very sense of self" (Mezirow 1991, p. 168). Because of transformative learning's challenging nature – Robertson (1996) notes that the educator engineers the collapse of a learner's existing perspective – the teacher has to consider carefully how to facilitate this change, how to create the trigger event that activates the process. Taylor (1989) defines a trigger event as:

incidents or experiences that disturb the individual's current view of reality; they are experienced as anomalies, curiosities, contradictions or disorienting dilemmas; they are experiences or events which demand attention and cause the individual to stop and think (p. 227).

Research on disorienting dilemmas provides evidence for a variety of situations that can act as a transformative learning stimulus. They range from the extreme of trauma and shock in the context of suicide bereavement (Sands & Tennant 2010), the sense-making process of HIV-positive adults (Courtenay, Merriam, Reeves & Baumgartner 2000; Courtenay et al. 1998), to the comparably less drastic forms of shock through cultural dislocation (Lyon 2001) or second chance educational opportunities (Bennets 2003). The research highlights the multitude of challenges that can foster transformative learning, yet in every case the individuals need some form of external stimulant to begin the process of transformative learning. This necessity for an external stimulus further contributes to the distinction between informational and emancipatory learning. Whereas informational learning, like the learning of a new language for example, can be done in solitude – naturally the quality of such an approach is debatable – a perspective change through emancipatory learning has to be triggered. Individuals follow a pattern of thinking, feeling and acting and, without an interruption that challenges these patterns, the thinking process remains biased by habits. That is to say, even if an individual finds himself or herself ‘trapped’ in a situation, habitual thinking patterns often prevent a change initiation.

While it is accurate that emancipatory learning depends on an external trigger, individuals can contribute to it by exposing themselves to situations that have the capacity to act as such a stimulus, such as travelling to a foreign country. By travelling I mean to immerse oneself over an extended period of time in foreign cultures, as opposed to short-term holidaying that has revitalization and relaxation as its main objective. Travelling exposes the individual to a range of unfamiliar social situations, and often forces them to do what does not come naturally, which can set a mental reorganization in motion. In other words, the experience of travelling instigates a range of planned and unplanned circumstances that change an individual's perception and break the habitual way of thinking.

While travelling has the ability to transform one's perspective, the present research concentrates on situations that are purposefully crafted for and feasible in an educational setting, which is explored in the following part of this chapter.

Lessons from the Arts

As discussed earlier, traditional management education with its instrumental reason in form and content overlooks the need for critical reflection. This has resulted in a narrow focus on informative learning of conventional business school curricula. An inquiry into the objectives of management courses – they are directed mostly at clearly defined skills and functionality¹³ – highlights that this particular learning environment lacks opportunities for transformative learning. Weick (2007) suggested that in order to “gain lightness and leave the heaviness of outdated concepts and assumptions behind one has to drop the tools of traditional logic and rationality” (p. 15). The question for the present research then is how to achieve this ‘lightness’, and how not to be weighed down by expectations and rules that are often inseparable from familiar content. That is to say, how can teachers assist their students in gaining an increased awareness, looking at issues from a different perspective and breaking through the visual and mental fog of habits and routines? Because management education is deficient in approaches that confront disorienting dilemmas, scholars and educators need to look outside the realm of standardized business knowledge. One possibility has been alluded to by Mezirow (2000a), who suggests “art, music, and dance as alternative languages” (p. 6). Art of the 19th and 20th century has continually challenged traditions and common sense which can bring about different ways of making meaning for an individual and contribute to an altered understanding of the world. In the following part of this chapter I follow Mezirow’s hunch, and attempt to carve an argument for the value of teaching with the arts that supports his suggestion.

The term ‘art’ is used very loosely by and with different meanings for every author. I will not try to define art because, as Wittgenstein (1958, cited by Lüdeking 1988) already observed, this would be an endless task that causes “mental convulsions” (p. 207), and is also well beyond the scope of my doctoral research. Instead, without differentiating between high art and popular art, for the following discussion I mean by art all cultural products like novels, paintings, theatre, films, dance, works of music and, more generally, objects one finds in art galleries and museums. On an epistemological level I concur with Goodman (1978), who

¹³ My experiences as teaching assistant for courses in Management and Human Resource at the University of Sydney Business School contribute to this observation. Additionally, an informal content analysis of courses offered by high-profile MBA schools like INSEAD or MIT reveals an emphasis on skills and tools to be acquired, and frameworks to be applied.

suggests “that the arts must be taken no less seriously than the sciences as modes of discovery, creation, and enlargement of knowledge” (p. 102).

The past few decades have seen a growing number of scholars and teachers turning to the arts to provide an answer to the above posed ‘how to’ question, and they provide a well of anecdotal evidence from their teaching experience. The variety of what is commonly accepted as art is mirrored in the pedagogical approaches these scholars have explored. The following selection then is only an illustration of possibilities, instead of being a conclusive review of all documented approaches. Ian W. King (2008), for example, turned to using paintings instead of case studies because he found that the latter often lack the ability to “capture the layers of knowing” (p. 44). He used a painting of Paul Klee, one of Europe’s great expressionist artists of the 20th century, to explore the epistemology of organizations, the ‘how do we know what we know’ of organizations.

The use of theatre/drama has also increased as a teaching method, both in business schools and as educational interventions in organizations. Meisiek and Barry (2007) explored how organizational theatre can affect employees’ understanding of their workplace, and Boggs et al. (2007) reported on the capacity of interactive drama to facilitate experiential learning for management students. Stevenson (1996) discussed the advantages of teaching his undergraduate leadership course through Shakespeare, and Karen Golden-Biddle (1993) has used Clifford Odets’ play *Waiting for Lefty* to encourage her MBA students to view work-related issues in a different light. Joseph Conrad’s short story *The Secret Sharer* has found its place in Joan Gallos’s (2008) mission to engage graduate students cognitively and emotionally with the difficult task of leadership. While its use is not as common as literature or theatre, the field of music contributes additional examples of arts-based teaching methods. Barrett (1998) used jazz as a metaphor to highlight the important skills of improvisation and provocative competence in management. And *Face The Music* is a collective of musicians and organizational development consultants who try to facilitate change by having managers write and sing blues as a means of expressing and reflecting on what their daily ‘blues’ is. This approach is based on the assumption that change can occur only when everyone involved has a chance to voice their concerns and apprehensions, which is often restricted by routine ways of expressing, and organizational conventions (Muoio 2000, cited by Nissley 2002).

Despite their variety, these approaches appear to have a common denominator: teachers and students search to augment their stock of tested knowledge and existing beliefs not by

attending to textbooks but by engaging with art instead. Supporters of the epistemological value of art suggest a range of benefits¹⁴ that revolve mainly around its capacity to reach different spheres of the mind which are otherwise inaccessible. Dewey (1934) for example proposes “[a]rt throws off the covers that hide the expressiveness of experienced things; it quickens us from the slackness of routine and enables us to forget ourselves” (p. 108). The latter capacity of ‘forgetting oneself’ indicates that art enables a person to overcome habits and rules that act as boundaries for individual development. Adjusting one’s personality can seem impossible in everyday life due to internal and external restrictions. Overcoming the internal limitations by discovering previously hidden potential is how I understand Dewey.

Marcuse (1978) believed that art “contribute[s] to changing the consciousness and drives of men and women who could change the world” (p. 32). Being grounded in Critical Theory, Marcuse naturally focused on the social benefits that art affords. However, a revised consciousness can contribute to a range of changes that have a more humble scope, like personal transformation. Eisner (1992) suggested “[t]he arts teach a different lesson. They celebrate imagination, multiple perspectives, and the importance of personal interpretation” (p. 594), and Adler (2006) concurs that “artistic traditions provide a better guide for creating possibility” (p. 495). Both Eisner and Adler emphasize the newness that art can provide. ‘Imagination’, similar to ‘possibility’, heralds fresh ideas by diverting from habitual knowledge. While possibility may initially appear as an optional quality, it is one of the driving forces for overcoming conventions, routines and old habits of mind. If learners don’t have an incentive to question conventional wisdom and identify alternative ways, or if they don’t see or are unaware of the opportunities that a change could afford, they rely on the skill of compliance instead of critical thinking. Management education that focuses on functionality does so at the expense of innovation and the development of fresh ideas, despite businesses’ acknowledgement of the importance of envisaging original solutions to problems (Hamel 2006; Jensen 1999; Pinchot & Pellman 1999).

Maxine Greene (1995a, 1995b, 1992, 1984, 1982, 1977a, 1977b, 1973a), a prolific scholarly and artistic writer who has devoted her work-life to the promotion of education and art, has

¹⁴ When I write of benefits of arts-based teaching, and arts encounters in the following paragraphs, it is based on the assumption that the learner deliberately and actively engages in the process. As my empirical findings will illustrate at a later stage not all learners appreciate artful teaching efforts, and engagement/commitment cannot be assumed other than for the purpose of the present theoretical explication.

provided an elaborate body of work on the transformative capacity of arts-centred experiences. While her claims to the efficacy of arts encounters are derived from the domain of humanities, emerging methodologies of psychology and brain science support her long-held belief that encounters with art have the capacity to make the involved percipient “see more, ... hear more. ... [to] experience a sudden sense of new possibilities and thus new beginnings” (Greene 1995a, p. 379).

Harvard’s Project Zero, The Dana Foundation and The National Science Foundation have all launched research inquiries to explore the connection between the arts and learning (Magsamen & Battro 2011). And Winner et al. (2006) undertook a research project that, first, analyzed almost 200 studies to test the claims for a connection of learning from the arts and functional skills like reading and maths, and, second, worked with five visual arts teachers to investigate which thinking skills can be developed through arts classes. Their findings on the functionality revealed that some skills of students who have received arts training might increase, but there is no ‘global effect’. Most functional skills don’t show a linear increase due to arts training; for example, making music or dancing does not automatically enhance reading skills. However, in the second part of their investigation they found that an engagement with the arts develops certain thinking skills, or what they call habits of mind. Unlike functional skills, the following cognitive skills are suggested to be transferable to a range of other disciplines: develop craft, engage and persist, understand the art world, observe, express, reflect, stretch and explore, and envision. The latter feature especially confirms Greene’s assertion that an engagement with the arts can release imaginative capacities that contribute to seeing unconventional solutions to situations. For Greene (1995b), “the role of imagination is not to resolve, not to point the way, not to improve. It is to awaken, to disclose the ordinarily unseen” (p. 27ff). That is to say, art does not give clear instructions on what possible alternatives might look like, but instead makes the percipient realize that there are, in fact, new and previously unconsidered possibilities.

This ability of seeing beyond what is presently visible is further emphasized by Arnheim’s (1986) conviction that humans have an inherent capacity for imagination because their physical abilities are only second to their mental capacity. The latter allows them to not only pose ‘what if’ questions but also to envision multiple answers and alternatives. The imagination of individuals has been described by Bronowski (1967) as a process that rearranges existing beliefs and perspectives thus enabling them to visualize new possibilities.

Imagination thus happens when existing and familiar things are mentally rearranged and create something new or, in Hjorth's (2011) words, "imagination provokes the world to become something it is not" (p. 57). While innovations occasionally occur by accident, such as the anecdotal story of how Percy LeBaron Spencer invented the microwave by working with radar waves when he realized that they melted the chocolate bar in his pocket, most technological and scientific advancements have come about through an effort to overcome and advance the habitual use of a product or service by envisaging alternatives. For Greene this mental competence of imagination is an indispensable branch of cognition that is fed by sensory activities, like engaging with the arts by reading a novel. She concurs with Stone, who says that "[w]riters like Gide, Funetes, Durrell, and Woolf ... are asking 'that their readers observe and acknowledge that reality is polymorphous, illogical, fragmented, chaotic, and above all, myriad faceted'" (Greene 1973b, p. 575).

For children this sense of 'polymorphous realities' comes naturally, as they are not bound by facts and rationality, even without being prodded by works of art. Their ability to conjure up realities other than their physical reality, and to not discriminate between them pertaining to quality or truth, enables them to switch from one reality to another with ease (Arnheim 1986; Ehrenzweig 1967). They do this kind of transitioning in their play all the time – the bathtub becomes a pirate's ship and the family dog a furry monster. Unfortunately an adult who plays is often perceived as someone who does not care enough about the important things in life, a kind of daredevil, or as someone who is simply not quite right in the head. Our society is obsessed with facts and obligations, and does not leave much room for the imaginative, creative world. Meisiek and Hatch (2008) have suggested that the "seriousness of ordinary everyday life needs to be complemented by play" (p. 413) because it can serve as the crack in the wall of established facts and taken-for-granted truth. Because there are few opportunities in adults' lives for the kind of child's play described above, being given the opportunity for playing with thoughts and ideas, and thus exuding imagination in a safe and encouraging environment becomes even more important.

Providing access to the realm of imagination and engaging the learner with previously unconsidered possibilities is one of the major benefits of enlisting the help of the arts. However, Greene (1992) additionally ascribed arts-based learning with the capability "to awaken persons to a sense of presentness, to a critical consciousness of what is ordinarily obscured" (p. 213). By approaching an issue obliquely, and thus confronting an individual with

the unexpected, artworks can lead to an increased awareness and a more acute sense of being. An arts-induced discrepancy has the ability to suppress habitual responses, and thus provides space for considering issues in a detached manner. Often when individuals are emotionally involved in a matter, thinking of it can be too painful, humiliating or depressing. However, by providing some distance, art can encourage an individual to think more honestly and clearly. Eisner (1992, citing Goodman 1978) exemplified this quality of art when he wrote:

Even fiction – perhaps especially fiction – can help us grasp the meaning not only of Don Quixote, the particular man, but of what we all share with him as we tilt at our own windmills, struggling to overcome seemingly insurmountable obstacles. Cervantes helps us understand such travails, and, because he succeeds so well, we come away from his work with a new view, a view that enables us to recognize and reflect on one of the important features of our own lives (p. 593).

Greene (1992) emphasized that wide-awakeness – a heightened awareness of ourselves, others and the surrounding circumstances – can only be brought about by first-hand art experiences. Experiencing art vicariously does not provide the same effect. Looking at a photograph of Van Gogh's famous painting *Starry Night* is not equivalent to seeing it in reality. While my thesis does not afford an illumination of the neuroscientific processes that make an arts encounter result in a state of 'wide-awakeness', it seems reasonable to prescribe a connection between art and various cognitive states in layman terms to the sensory sensations that real life art provides (Joy & Sherry 2003; Lopes 1997; Johnson 1987). For example, the process of looking at a painting in a museum employs not only basic vision – colour, light, the texture of the paint, the type of brushstrokes, the viewing angle – but maybe even the smell of the exhibition place embodies perceptive qualities that contribute to a richer, more complex sensory experience. Burton (2000) eloquently proposed "experience ... is not a spectacle observed from the outside; it is something within which we are situated, the features of which engender thoughts, feelings, and sensory resonances within us and on our skin" (p. 333). Thus the interplay of physical exposure to art, which triggers sensory reactions, immerses the percipient in an experience that can lead to an increased and/or critical awareness of subconsciously restrained issues.

A painting has brought about a personal example of this form of heightened awareness and self-confrontation. Alexander McKenzie's¹⁵ *Circle of Friends* strikes a particular chord with me. It depicts a group of large fish swimming in a circle, in murky green water with darker and lighter nuances, half touching each other, half disappearing in the shadows. The artwork not only continues to intrigue me on a visual level but during a first visit it surprisingly triggered feelings that I probably would not have actively considered or confronted in an everyday situation. The complexity and (subjective) beauty of the painting made me explore previously muted feelings of belonging and loss, and reconsider relationships with past and present friends – on both a general and a particular level.

Wood (2002) aptly described such art experiences as an “antidote to the anaesthetic, the dull routines and conventions that characterise contemporary society” (p. 91). Because too often habitual ways of thinking and feeling dominate the mind, art can provide the necessary space and distance for critical reflection.

Having established the advantages that arts-based teaching can provide, I want to conclude the discussion of arts encounters with Greene's suggestion assertion that imagination and wide-awakeness “[do] not happen automatically or naturally. ... Mere exposure to a work of art is not sufficient to occasion an aesthetic experience. There must be conscious participation in a work” (Greene 1995a, p. 379). While individual percipients often have some form of motive to attend to art in a deliberate manner, activating this kind of engagement in business school environments can be more challenging. Because of this attention issue I would like to extend the argument for arts-based methods with one specific element, which is thought to limit passive, non-conscious participation in artwork.

About Brecht

Bertolt Brecht, German dramatist of the early 20th century, made a similar suggestion to that of Greene pertaining to art's ability to command attention. Investigating his background, Bertolt Brecht (1898–1956) is not the most obvious choice for providing insights in the context of management education. First, he was primarily an artist and was not concerned with an advancement of scholarly education frameworks. This leads to the second point, which is the lack of a coherent philosophy for his numerous poems, plays and letters that

¹⁵ Alexander McKenzie is an Australian artist, born in Sydney.

could shed light on how to extrapolate his work for pedagogical purposes. And third, as described by one literature critic (Reich-Ranicki 2001), Brecht was egocentric, insecure, aggressive, abusive, and had never read much world-class literature. He utilized ideas, theories and products of whomever he found a useful contribution to his art – often without acknowledging this, or if caught out openly admitting to “a fundamental laxity in questions of literary property”¹⁶ (Fuegi 1994, p. 111). Taken together, these reasons weigh heavily against his qualification as an educator.

However, despite his rather flawed and crooked personality, I would like to argue for his consideration in management education based on his contribution to art. Brecht was interested in producing a theatre that would educate his audience, that is to say he had didactic in mind when he said, “[t]he new purpose is called pedagogics” (Brecht in Willett 2001, p. 30). Often seen as an attempt to educate the audience for communism, Brecht scholars (Gray 1976) would agree that while he was sympathetic to Marxian theories his inclination towards communism was more sparked by his anti-nazism and anti-capitalism (Shevtsova 1994). Despite the latter disposition, however, after his return from exile to communist East Berlin, he kept his Austrian passport, his Swiss bank account and “handed the copyrights for his plays to West German publishers” (Schevill 1961), which suggests that he was also driven by a certain amount of opportunism. Also, he was never a member of any communist party, and preferred to keep a certain flexibility to his plays his theatre-work always came before politics. The main reason to turn to Brecht’s support for management education, however, is his relentless interventionism to highlight societal deficits in order to fight against the status quo and to make people think.

A man full of contradictions and in constant flux, Brecht was known mainly as a serious playwright who constantly criticized and demystified reification and, despite all his unadmirable character flaws, he was also a curious, fun-loving creature who loved detective novels, played his guitar to charm friends and lovers, enjoyed Charlie Chaplin movies and admired German comedian Karl Valentin. To fully appreciate Brecht’s theatre philosophy it is important to remember that he was not an embittered outsider who sought revenge for a

¹⁶ Fuegi (1994) gives a detailed account of how Brecht used works of others and marketed them as his own, particularly those of his former lover and assistant Elisabeth Hauptmann, who wrote a large amount of Brecht’s plays. However, while being lax with the intellectual property of others he was extremely protective of his own work, and saw himself as a brand which deserved protection.

harsh childhood or lost youth. Quite the contrary – while working on his own plays he published theatre reviews on a regular basis and, more importantly, also won the prestigious Kleist¹⁷ prize with *Trommeln in der Nacht* (Drums in the Night) in 1922. The mid-1920s saw a frisky Berlin, where pleasure was sought and offered in various forms like “non-stop dance marathons, free body culture, ... and cabarets with strippers” (Leach 2004, p. 106). It was a pleasure-seeking time, fuelled by economic growth, and the privately owned theatres in Germany focused more on making profit than providing artistic provocations. But as much as Brecht appreciated fun and enjoyment, he still worked towards a transformation of the traditional German theatre of the time because he wanted theatres to be places of education that fostered participation and engagement, and provided space for thought and questioning. One of his most important contributions towards this goal was the conceptualization of the *Verfremdungs-Effekt*, or V-Effekt as he abbreviated it, which is at the heart of this thesis. Art, being free from practical necessity, has the general ability to let individuals encounter the world in a different context, and *Verfremdung* is one particular artistic feature, which aims to distance, to highlight and draw attention to its object.

About *Verfremdung*

The German word *Verfremdung* has received various translations from the English-speaking world. Strauss (2005) called it ‘strangification’, while others (Frimberger 2009; Driver 2003a; Willett 2001; Féral 1987) have translated it with the more frequently used term of ‘alienation’. However, for the following discussion I use the term ‘estrangement’ as suggested by Bloch (1962), and qualify this decision with an initial analysis of the difference between *Entfremdung* (alienation) and *Verfremdung* (estrangement). While the difference between the two German words is signified only by an altered prefix, their different meanings are significant. The following discussion attempts to both shed some light on this distinction, and illustrate how they are nonetheless connected.

Entfremdung vs Verfremdung

In his work *Verfremdungen I*, Ernst Bloch (1962, pp. 8190) gives a linguistic account of the different meaning of *Entfremdung* (alienation) and *Verfremdung* (estrangement), highlighting that they should not be treated as identical. Bloch ascertains the origin of alienation in the

¹⁷ The Kleist prize is still to date being awarded to outstanding German litterateurs.

Latin word *abalienare*, which means to sell or to give up something. Similarly, the meaning of the term *alienato* can be found as the legal concept of transferring something (Fankhauser 1971; Rotenstreich 1963), which suggests that alienation is related to the separation of man from something. In this business/legal sense the ‘something’ can be understood as goods or possessions, which is not necessarily negative as this only implies the rules of trade. However, not only did the traditional meaning of the word vanish, but also the word itself almost completely disappeared from the linguistic map. It was only through Hegel, and in succession Feuerbach and Marx, that alienation reappeared but by then it had a very different implication as it meant the giving up of something other than merchandise (Markus 1982; Bell 1959; Pappenheim 1959). While Marx expressed numerous areas where alienation occurs, for example religion and labour, the latter one remained his main concern. According to Marx, alienation occurs within the capitalist mode of production, where men are subjected to exploitation and forced to sell their labour capacity. Bloch, Halley and Suvin’s (1970) clarification highlighted the detrimental effects of alienation, which they called the ‘evil mode of experience’:

Most people count only as cogs in some system and are wholly reduced and quantified according to their salable [sic!] work-power ... Relationships between people are reduced to their exchange value, while the circulation of commodities becomes an independent force behind the backs and above the heads of human beings (p. 121ff).

This reified¹⁸ state of existence fails to accommodate human nature’s need to express itself, which leads to compliance and the preservation of an existing status quo. While our ‘new’ economy is based less on manual labour that alienates humans, Marx’s concept of alienation still applies. Being restricted by habits, traditions and societal norms, individuals are pressed into the moulds of expectations, which they are often incapable of noticing.

Contrary to this negative state of experience, *Verfremdung* has the capacity to act as a form of estrangement or de-alienation. Whereas the term *alienation* can be traced historically to Hegel, Bloch has found evidence of the first use of the actual word *Verfremdung* in Berthold Auerbach’s novel *Neues Leben* (New Life) only in 1842 (Bloch 1962, p. 82), where it is used to

¹⁸ See page 74ff of this thesis for a more detailed discussion of reification. For the moment it suffices to say that reification means the process whereby humans come to see social structures or situations as natural, instead of realizing that those are actually human creations that can be modified.

express a form of distancing. Bloch, Haley and Suvin's (1970) ensuing comment "[f]rom this usage it is a huge leap to Brecht's use of the word *Verfremdung*" (p. 121) indicates that the term was not particularly common and its documentation has a substantial gap. Details of the development of *Verfremdung* from Auerbach to Brecht, however, are beyond the scope of this research. The following paragraphs continue with a general discussion of the concept.

The primary task of *Verfremdung* is to render familiar things strange and surprising, and to act as a challenge in the form of the unexpected (Ungvari 1979). As established at the beginning of this chapter, certain habits and routines need to be disturbed to avoid a manifestation of undesirable conditions, that is to say, to avoid reification. When everyday assumptions remain unchallenged, motives for actions are invisible, and the development of alternatives is impeded. By presenting familiar objects and situations in an unusual context or format, *Verfremdung* draws attention to one's assumptions.

When *Verfremdung* takes the spectator by surprise it serves as a spotlight that brings out peculiarities, which are usually lost in the seeing and knowing of everyday familiarity. This means that it can create a distance from what individuals take for granted, and in the language of transformative learning *Verfremdung* can serve as the 'disorienting dilemma' that instigates the process of reflection. One way of achieving *Verfremdung*, for example, is when novelists and filmmakers use narrators, so that the story is told from a specific viewpoint that draws attention to things that the percipient would usually no longer notice.

A specific example for this kind of *Verfremdung* can be found in Michael Haneke's movie *Das weiße Band*¹⁹ (2009). The film's narrator relays the violent events that happen in a small German village in a matter-of-fact way, which contradicts the severity of the incidents. To add to its strangeness, the movie is in black and white, uses music only sparsely, and has a runtime of 2.5 hours. This deviation from contemporary Hollywood movie standards leads to a heightened awareness because the unexpectedness of the format signals that this film requires attention. Additionally, the narrator's neutral tone, which in comparison to habituated expectations appears out of place, acts as a reminder that situations are not natural and predetermined but constructed and changeable (Duarte 2002; Wright 1989).

¹⁹ The White Ribbon (2009): "Strange events happen in a small village in the north of Germany during the years just before World War I, which seem to be ritual punishment. The abused and suppressed children of the villagers seem to be at the heart of this mystery" (The Internet Movie Database, viewed 30.10.2011, <http://www.imdb.com/title/tt1149362/>).

The outcomes of Entfremdung (alienation) and Verfremdung (estrangement) are polar opposites then. One stultifies awareness while the other aims at increasing it. However, despite their different characteristics they are, first, connected by their core word *fremd*, which means alien or strange. And second, both concepts share the assumption of a split with or separation from something, and some form of externality (Bloch, Halley & Suvin 1970). In case of alienation humans are externalized from their nature, while Verfremdung deliberately uses external elements that appear out of context. In an educational setting the use of Verfremdung aims at separating the learner from their taken-for-granted assumptions in order to make habitual thinking visible and allow critical reflection. Despite the term Verfremdung appearing only in 19th century literature, as established by Bloch, its underlying concept and function can be traced back to ancient Greece (Fankhauser 1971).

However, rather than giving a full account of the concept's history, my discussion focuses instead on the content and form of Verfremdung, which can be distinguished in two main categories, as suggested by Helmers (1984) and his collaborators: Verfremdung in a wide sense, where it is used as an aesthetic device, and the narrow concept of Verfremdung, which is mainly a form of critique of norms and conventions, and is directed towards pedagogical objectives. These two categories have not developed in historical linearity; they do not constitute sequential building blocks where the aesthetic device developed into critique. However, their distinction is often blurred by overlapping objectives which means that ultimately the producer decides in which category they would place their Verfremdung. The following paragraphs provide a brief overview of the wide category, and focus with a more detailed investigation on its narrow counterpart.

Wide Sense of Verfremdung

The first of the two categories of Verfremdung has been made visible by and is well documented in the works of the Russian Formalist movement, who represented one of the schools of literary art in Russia for a short period in the early 20th century²⁰. In the beginning of their literary scholarship their main aim was to distinguish literature studies from other subjects of investigation by exploring the question of what makes "a given work a work of literature" (Jakobson cited by Erlich 1981, p. 172). They investigated what distinguishes a

²⁰ The Russian Formalist movement was rather short-lived and existed only from 1915/16 until the early 1930s, when it was politically suppressed (Erlich 1981, 1973).

work of literature from non-literature in all its facets (Lemon & Reis 1965). However, during their examination of 'literariness' the focus shifted "to the essential function of poetic art" (Erich 1973, p. 629), which means that the Formalists became less occupied with the individual components of literature and instead found an interest in literature's function "to force us to notice" (Shklovsky 1965, p. 4).

Viktor Sklovskij²¹, as one of the Formalists' leading thinkers, had already developed his concept of distanciation or estrangement – *ostranenie*²² – in the early stages of the Russian Formalists. His 1914 essay *Voskresenie slova* (Resurrection of the Word), as well as his treatise *Art as Technique*, argue for the use of a different and kind of awkward language, which lets the reader not only see but recognize (Boym 1996; Thompson 1971; Lachmann 1970). Sklovskij's suggestion for using peculiar language in literature was based on the assumption that everyday routines and habits result in the 'automatization of seeing', which is tantamount to a decreased awareness. This kind of seeing can be described as an unconscious process, similar to how an experienced driver shifts gears without having to think about it. However, while the latter highlights the beneficial side of habits, automated seeing is the negative consequence of habituation resulting in a lost ability to recognize things for what they are. A world obsessed with simplification, and an emphasis on making the unfamiliar familiar, limits not only the expression and reception of art but also leads to a mundane life where nothing is left to be explored. Sklovskij (1917 [1965]) highlighted the devastating effect of such a state when he wrote:

And so life is reckoned as nothing. Habitualization devours works, clothes, furniture, one's wife, and the fear of war. If the whole complex lives of many people go on unconsciously, then such lives are as if they had never been (p. 12).

Ostranenie (estrangement) was Sklovskij's poetic attempt to interrupt the automatization of seeing so that people would live in a state of aesthetic awareness and conscious participation.

²¹ The spelling of his name varies between authors, and is alternately spelled Sklovskij in German texts, and Shklovsky in English language works. Because I have consulted mainly German language sources, I follow the German spelling of his name, unless a reference requires otherwise.

²² Renate Lachmann (1970) traces the word *ostranenie* back to *stranneji*, which means 'strange'. The literal translation of *ostranenie* reads as 'making it strange'. A similar syntactic analysis is provided by Gertrud Fankhauser (1971), which supports Lachmann's work.

Narrow Sense of *Verfremdung*

While the wide sense of *Verfremdung* has a focus on aesthetic aspects of art, *Verfremdung* in the narrow sense is concerned with didactic objectives, which links it to the educational context of the present research endeavour. In *Phänomenologie des Geistes*²³, German philosopher Hegel (2004 [1807]) highlighted the necessity of *Verfremdung* for cognition and learning when he wrote “Das Bekannte überhaupt ist darum, weil es bekannt ist, nicht erkannt”²⁴ (p. 12). This means that a thing remains unknown because of its familiarity, with the consequence that in order to fully recognize and understand something one has to shift the perspective and look at it from a different angle – as if it was something unknown, which needs methodical exploration.

Hegel identified Socrates’ irony²⁵ as a form of estrangement that questions familiar concepts and provides an opportunity for realizing possible flaws of taken-for-granted assumptions (Helmerts 1984). By pretending to not know, that is by feigning ignorance, Socrates estranged the familiar in a rhetorical way. Hansen-Löve (1978) called this technique ‘exposure-dialectic’, which, instead of providing ready-made answers, leads the audience to draw their own conclusions of their argument. Vlastos (1987) investigated Socratic irony, suggesting that the “Socratic method of elenctic argument” (p. 86), meaning the rhetorical method of arriving at a conclusion by logical confirmation and refutation of arguments, provides the learner with a deeper knowledge than the ‘banking approach’ (Freire 1970), where knowledge is simply transferred without questioning. By engaging his students and listeners in independent, logical ways of thinking, Socrates’ dialogue-centred irony additionally de-reified the traditional Athenian approach to gaining knowledge through some mystical, higher-order device (Levi 1956). Hegel appreciated this kind of logic rationality as a “condition of ... freedom” (Taylor 1979, p. 25), but it was partly this idea of freedom and individual consciousness that made Socrates highly unpopular with his contemporaries, and eventually led to his premature death. Vlastos (1987) gave an example of Socrates’ capacity as an agitator with the story of Alcibiades, which demonstrated that this kind of knowledge

²³ *Phenomenology of Spirit*.

²⁴ Meaning literally ‘the known is not recognized because it is known’.

²⁵ **Irony**, 1 the humorous or mildly sarcastic use of words to imply the opposite of what they normally mean ... (Collins English Dictionary 1998, p. 812). **Socratic irony**, a means by which the pretended ignorance of a skilful questioner leads the person answering to expose this own ignorance (Collins English Dictionary 1998, p. 1457).

acquisition can be uncomfortable for the learner because it forces them to realize their possible shortcomings.

In this story, Alcibiades, an exceptionally handsome young boy in his teens, hatches an elaborate plan of seduction in an attempt to swap his beauty, that is to say sex, for Socrates' wisdom. But when the moment of truth arrives, he receives a shattering rejection by the ever-so-cool Socrates:

Dear Alcibiades, it looks as though you are not stupid ..., if what you say about me is true and there really is in me some power which could make you a better man: you must be seeing something inconceivably beautiful in me, enormously superior to your good looks. If that is what you see and you want to exchange beauty for beauty, you mean to take a huge advantage of me: you are trying to get true beauty in exchange for seeming beauty – “gold for brass” (Socrates in Vlastos 1987, p. 89).

Vlastos's dissection of this answer draws attention to the features of Socratic irony. By saying “you are not stupid”, Socrates adumbrates to Alcibiades that he is seeing through the scam. But instead of directly accusing Alcibiades of deception, Socrates uses the strength of irony to make his point. Suggesting that his young companion is trying to exchange his beautiful body for Socrates' beautiful mind, ‘brass for gold’, Socrates is exposing Alcibiades' attempt by drawing attention to his ignorance. Vlastos's vivid analysis reads, “Socrates is saying to Alcibiades: I would have to be out of my head to buy your proposal; what a fool you must be, a complete ass, to think you could pull it off” (1987, p. 89). This kind of ironic rejection must have been more painful for Alcibiades than a simple ‘no’: first, it highlights his flawed perception of how to achieve wisdom and, second, one could imagine that he must have felt stupid, not only for having failed with his plan but for being caught out, too. While transformative learning does not intend to humiliate or make the learner feel stupid quite the opposite, it triggers introspection that might be just as unsettling as Alcibiades' experience.

Bertolt Brecht's *Verfremdung*

Helmers's (1984) analysis of estrangement has identified a similar Socratic notion of *Verfremdung* in Bertolt Brecht's theatre work. Brecht aimed at achieving reflection by questioning what appears natural and inevitable, and similar to Socrates, he wasn't concerned with providing answers but instead guiding the spectator/learner to realizations.

While Brecht saw his, and ipso facto his theatre's, main task as changing existing social and political circumstances, I am deliberately avoiding this particular focus in my discussion, unless it provides vital background information, for several reasons. First, the political and ideological context has changed considerably since Brecht's times, which means that this specific content of his theory holds little practical value; second, I am analysing Brecht's work with a different target group in mind, which extends the previous point pertaining to relevance; and third because his theatre, as Driver (2003a) writes, "was ultimately a practical tool, one that derived its value from helping audiences gain a different perspective" (p. 86), meaning that the applicability of Brecht's theory is not limited to particular political themes or otherwise restricted.

Epic Theatre

Opposed to the contemporary theatres' focus on maximizing revenue with crowd-pleasers, Brecht wanted to provide his audience with a theatre experience that excited them to use their intellect, and unlearn their expectation of being spoon-fed light fare. The traditional drama for him was a "culinary affair" (Brecht in Willett 2001, p. 87) that allowed its audience to remain ignorant to what was happening on the political and societal stage. Not so in the theatre that Brecht had in mind though – here discrete thinking was the shibboleth. His criticism of traditional drama was based mainly on its adoption of Aristotle's format of the tragedy, which relies on empathy to connect with the audience (Wright 1989; Rüllicke-Weiler 1966). Quoting Horace's *Ars Poetica*, Brecht (in Willett 2001) described this expression of emotions:

You must enchant and conquer the reader's breast.
One laughs with those who laugh and lets tears flow
When others are sad. So, if you want me to weep
First show me your own eye full of tears (p. 270).

Brecht felt that empathy generates catharsis, which "spiritually cleanses the spectator" (Willett 2001, p. 87) or in Meisiek's (2004) words "releases negative affect" (p. 797). By engaging emotionally with the protagonist, the audience vicariously lives through his experiences, albeit being reduced to feelings of fear – of personally having to endure the protagonist's misfortune – and pity – feeling sorry for the protagonist. In this sense the act of catharsis mechanically trains and enforces certain beliefs, pertaining to which actions bring pain and thus ought to be avoided (Lear 1992). Brecht felt, however, that pity for the

hopeless, unchangeable fate of characters in a drama provided no didactic value. By ignoring that historical conditions, events and behaviours are created by humans, Aristotelian drama deflects from the fact that alternatives and change are possible. Unsurprisingly, this form of ‘Pavlovian’ conditioning, which trained the emotional reflexes of its audience, was not agreeable for Brecht, and partly explains his rejection of theatrical works of his time.

Brecht’s refusal of Aristotelian empathy was based on his observation that it “triggers emotional reactions, which are not in the interest of the audience” (Brecht in Hecht 1970). That is to say that stale empathy, which is forced upon the spectator, is not the right method to lead him to critical analysis and reflection – both of which were major elements of concern for Brecht. His argument against empathy has often led to the assumption that his theatre was entirely devoid of emotions; however, this supposition is only partly accurate. Brecht felt that instead of forcing the “protagonist’s sensations, insights, and impulses on the spectator” (Brecht 1960a, p. 23) the epic theatre should provide the space for exploring alternative ideas to established wisdom. His theatre meant to employ and provoke emotions that would operate as action stimuli; hence Brecht’s epic theatre was not without emotions but instead it approached emotions with different objectives than the dramatic theatre.

Brecht’s observation that “[t]hat which has not been changed for a long time appears unchangeable” (Brecht 1960a, p. 26) made a new theatre that allowed for common sense to be disturbed a high priority for him. However, Brecht’s epic theatre is not to be credited to him alone. A prototype for what Brecht had in mind was Erwin Piscator’s political theatre. Piscator was one of the first directors in Germany who wanted his “theatre of awareness” (Kerz 1968, p. 364) to stimulate public discourse. His theatre deviated from realistic theatre in its content and was also equipped with novel stage design to give the actors more mobility – which they not necessarily appreciated as it made their work on stage more difficult. To a certain extent Piscator was obsessed with innovating stage design and mechanisms. Also, in stark contrast to the plays of his time, he integrated films, photographs and drawings in his performance. Piscator and Brecht collaborated on several plays and, in an uncharacteristic gesture, Brecht humbly acknowledged Piscator’s influence on his work, and admitted that without Piscator his own work would have never taken place (Kerz 1968). Brecht extended Piscator’s work in the sense that he looked for artistic and aesthetic devices to help the actor transmit the message of the play. Although he also incorporated different elements like films

and posters, Brecht relied less on stage technology and more on the skills of his actors (Rülicke-Weiler 1966).

Lehrstück

Brecht's actors were crucial for creating the V-Effekt, and for activating the audience's awareness. As mentioned earlier, the playwright did not want the audience to simply have an aesthetic experience but to get intellectually involved and have or develop an opinion on what they were observing. His ideas and objectives for the epic theatre, as well as his passion for audience involvement, are most clearly pronounced in Brecht's development of his Lehrstück²⁶ (learning play). These plays deserve particular attention because they not only prepared the ground for Brecht's development of his concept of Verfremdung, but also anticipated Brecht's acting model of Gestus, which is discussed later in this chapter. The Lehrstücke were of an experimental nature and eliminated the distinction between spectator and actor, a fusion which Augusto Boal²⁷ (1979) later coined spect-actor. In an attempt to eliminate passive art consumption, and to increase understanding and participation, learning plays were not aimed at entertaining an audience but everyone present was to take part in the performance. Reiner Steinweg's (1978; 1976) research on Brecht's Lehrstücke has allowed him to identify five characteristic traits that distinguish it from other forms of theatre (Steinweg 1978, p. 8):

i) 'it was intended as a theatre without audience' – as mentioned above, the learning plays were designed to erase the distinction between actor and spectator, and were made up of large groups (some of Brecht's worker collective choirs held up to 400 participants). However, there were exceptions to this 'no audience' rule. One example amongst others is Brecht's staging of the *Badener Lehrstück vom Einverständnis* (The Baden-Baden Cantata of Acquiescence) at the Baden-Baden Music Festival.

ii) 'Brecht's manuscripts used negative (anti-social) behaviour and speech patterns' – while this appears similar to Aristotle's protagonist, who suffers from his own wrongdoing or ill

²⁶ *Lehrstück* is the German word for learning play in its singular form, while *Lehrstücke* signifies the plural.

²⁷ Brazilian playwright Boal partly based his theatre on Brecht's didactic approach, and created plays for peasants to empower them by showing how reality is constructed and not a natural given. Boal's theatre aimed at de-reifying particular social situations, and helped his audience to overcome class-related oppression.

fate, the learning plays worked through the initial negative behaviour pattern to demonstrate the changeability of a character. This is a clear distinction from dramatic theatre.

iii) 'lack of character development in the play, but instead modular structure of contradicting situations with a specific problem that is approached from a variety of perspectives' – the protagonist(s) of the learning plays don't develop their character in the course of the play. Instead they find themselves in story-independent situations/issues that need to be solved; various solutions are offered throughout the play.

iv) 'the play does not contain a manuscript-based thesis as an educational objective'²⁸ – Steinweg suggests that while Brecht attempted a perspective change with his learning plays, they were not bound to a specific learning outcome; primarily they served as a forum for expression and negotiation, which then in turn could trigger change.

v) 'manuscripts are mere suggestions, intended for review, extension and adjustment in the course of the various performances' – this feature is linked to the previous one; unlike traditional theatre, learning plays provided a space for reflection and discourse. They didn't follow a manuscript word by word but instead the content and pace of a performance, as well as of the simultaneous intervention process, varied considerably.

These five distinctive features highlight the experimental character of the learning plays, and their emphasis on didactics. Brecht developed these plays based on the belief that "moral and political lessons are best taught by participation in an actual performance" (Brecht in Willett 2001, p. 33) and, while communist themes are less suitable for current times, a variation of themes is imaginable. For example, a contemporary Lehrstück could examine the relationship between society and environment, or individual and social responsibility. Their didactic relevance can also be found in Steinweg's (1978) essay collection on the pedagogical application spectrum of the Lehrstücke in schools, and Wirth's (1999) report on his longstanding experience of organizing Brecht's learning plays with university students.

²⁸ Objecting to Steinweg's interpretation of thesis-free learning plays, Wirth (1999) puts the hypothesis of 'Lehrstücke as sound therapeutic poems' forward. However, there is no conclusive agreement as to whether the learning plays should be regarded as thesis pieces or not (p. 113).

The Lehrstück period²⁹ is usually seen as the peak of Brecht's political theatre work because it clearly points towards Marxist ideas, for example the relationship between the individual and the collective. They were directed mainly at school classes and worker collectives³⁰, and were thought of as a 'socialistic worker theatre' (Rülicke-Weiler 1966). The Lehrstücke can be seen not so much as artistic works but instead as practical manuals for critical thinking. For Brecht this meant, first, to identify and recognize ruling beliefs or assumptions, then in a second step to break them up, with the best possible outcome being a change of existing conditions (Kamath 1983, p. 74). The difference between the Lehrstück theatre and Brecht's later, more popular plays is that Lehrstücke deviate completely from the traditional notion of theatre, which allowed Brecht to exaggerate his artistic ideas. Through their spect-actor structure the learning plays aimed at emancipation from within, meaning that change was brought about by the performers, while Brecht's later Schaustücke [plays for the benefit of the audience] provided external education for the audience.

However, Brecht eventually abandoned the Lehrstück project for several reasons. First, this kind of experimental theatre was not feasible during his time in exile, and it would have been nearly impossible for him to gather the required large audience/performers in a non-German speaking context. Second, and possibly even more important, those plays did not have a place in the 'cultural landscape' (Milfull 1976) after his return to the then East Germany. Müller (1994) expressed this redundancy: "[w]hen social conditions were no longer appropriate for this practice, Brecht discontinued his work on the Lehrstück and reverted to the Schaustück" (p. 82). Maybe he also realized that a total transformation of the culture industry was not possible and possibly even not fully required or desired. While this has to remain speculation, we know with certainty that Brecht wanted to find more balance between education and entertainment. He realized that the division between learning and pleasure he had created was not natural, and aimed to bridge this gap to reach a wider audience. But this is not to say that Brecht completely abandoned his plays' didactic purpose. Similar to the Lehrstücke, Brecht's later plays wanted to change the spectator's attitude, and turn him into an active observer, who practices his critical thinking skills.

²⁹ Brecht wrote his learning plays over the period 1926-1933, which was politically a highly charged time. These challenging conditions are mirrored in Brecht's focus on social and political issues (Müller 1994).

³⁰ This target audience is similar to Augusto Boal's audience for the *Theatre of the Oppressed*.

This change in attitude was sought by Brecht through the modification of various elements of the theatre experience. Table 1 presents Brecht's comparison of dramatic and epic theatre.

| DRAMATIC FORM | EPIC FORM |
|--|---|
| The stage 'incarnates' an event | It relates it |
| Involves the audience in an action, uses up its activity | Makes the audience an observer but arouses its activity |
| Helps it to feel | Compels it to make decisions |
| Communicates experiences | Communicates insights |
| The audience is projected into an event | Is confronted with it |
| Suggestion is used | Arguments are used |
| Sensations are preserved | Impelled to the level of perceptions |
| The character is a known quantity | The character is subjected to investigation |
| Man unchangeable | Man who can change and make changes |
| His drives | His motives |
| Events move in a straight line | In 'irregular' curves |
| <i>Natura non facit saltus</i> [nature does not make jumps] | <i>Facit saltus</i> |
| The world as it is | The world as it is becoming |

Table 1. Differences between dramatic and epic theatre (from Brecht 2000, p. 23)

This side-by-side comparison provides an overview of what Brecht had in mind when he took on the challenge to change the existing theatre landscape. As mentioned previously, he wanted the 'spectator to be an observer', who does not attend absent-mindedly, but uses and sharpens his thinking skills instead. Brecht wanted to show the unnaturalness of objects and situations, and demonstrate that humans have the ability to adjust and amend anything because perceived realities are merely man-made and alterable. In addition to the different objectives of these two theatre forms, they also differ in technical issues, like the portrayal of the narrative progression, which takes place in subsequent scenes in dramatic theatre opposed to the self-contained development of events in epic theatre, for example. Such technical production elements lend themselves to act as *Verfremdung*, and in the following part of this chapter I clarify how Brecht defined and created *Verfremdung* for his ambitious educational theatre.

Illustration of Brecht's V-Effekt

One of the principal ideas behind Brecht's didactic entertainment was a 'productive' theatre, which, through the application of the *Verfremdungs-Effekt* (estrangement effect), or the V-Effekt, would encourage the audience to exercise complex seeing, which means the process of seeing and analyzing things differently, and critically reflecting on alternatives from a detached perspective (Nelson 2011; Franks & Jones 1999; Williams 1961). As with other ideas and concepts, *Verfremdung* is not solely Brecht's intellectual property. However, despite borrowing from the Chinese acting style of Mei Lan-fang, Brecht deserves credit for producing the most comprehensive body of work on *Verfremdung*, which also explains the widespread association of this concept with him. *Verfremdung* is, first and foremost, an artistic concept of acting and production (Blau 1957) that actively works against the maintenance of passive theatre consumers by creating a sense of strangeness and astonishment.

The objective of Brecht's V-Effekt was to stimulate the spectators' curiosity, leading to insights and realizations pertaining to the changeability of established situations or routines, thus encouraging a basic willingness for change (Müller 1984). As Brecht (in Willett 2001) elaborated:

The [V]-effect consists in turning the object of which one is to be made aware, to which one's attention is to be drawn, from something ordinary, familiar, immediately accessible, into something peculiar, striking and unexpected. What is obvious is in a certain sense made incomprehensible, but this is only in order that it may then be made all the easier to comprehend. Before familiarity can turn into awareness the familiar must be stripped of its inconspicuousness; we must give up assuming that the object in question needs no explanation. However frequently recurrent, modest, vulgar it may be it will now be labelled as something unusual (p. 143ff).

Brecht's description of *Verfremdung* displays similarities to the Russian Formalists' notion of *ostranenie* (estrangement) in that it wants to expose the familiar by making it unfamiliar, that is to say by making it appear novel and astonishing. But whereas the Formalists were chiefly concerned with poetic estrangement in literature, Brecht saw two major sources for *Verfremdung* in the context of theatre. The first is that the content of the play, which means the story, can act as *Verfremdung*. And second, *Verfremdung* can be found in the production of the plays that includes all possible production elements, from the use of a narrator and arrangement of musical items to Brecht's concept of *Gestus*. With the help of Brecht's play

Mutter Courage und ihre Kinder (Mother Courage and her Children) I will attempt to shed some light on these mechanisms of *Verfremdung*. It contains both content- and production-based forms of estrangement. The following is a brief synopsis of the story:

The play is set at the beginning of the Thirty Years War. The protagonist Anna Fierling, who goes under the name of Mutter Courage, is a businesswoman and single mother of three teenage children: one mute daughter, Katrin, and two sons, Eilif and Schweizerkas (Swiss Cheese). *Courage* is a *Marketenderin* (sutler), which means that she is in the risky business of provisioning military troops, consequently requiring her to follow the war instead of avoiding it. She tries to provide for her family through the war but ends up losing her children to it. The last scene of the play shows her handing over money for the funeral of her daughter, and then following a regiment that happens to be passing by, expressing the hope of reviving her business and profiting from the war (Thomson & Gardner 1997; Hecht 1979; Brecht 1978).

The first source of *Verfremdung* can be found in the story of this play. From the outset Mutter Courage is trapped in contradictions, like the contradiction of being a businesswoman and mother. In Scene 1, for example, Courage fiercely protects her sons from being recruited into the military service but gets distracted throughout the process by an opportunity for selling a buckle. However, the sale is a diversionary tactic, and the shopper is a companion of the military recruiter. But being occupied with the business transaction, she fails to notice that one of her sons, Eilif, is getting enlisted in the military. She only becomes aware of Eilif's absence after having closed the deal. But instead of acting in a way common sense would expect from a mother – that is, to raise the alarm, to express grief, or try to find Eilif and buy him back – she only tells her daughter that she now has to help Schweizerkas to pull the wagon. This lack of emotion and action that follows the disappearance of her son is likely to create a sense of strangeness for the spectators. The audience is probably surprised by her actions, and might even start to feel uncomfortable about her character. When such audience reactions surface *Verfremdung* is at work, which can lead to further reflections, in this specific context on war and parenthood for example.

In the course of the play Mutter Courage loses one child after the other due to the war, but despite these losses continues her business, which is inseparable from war. And while she occasionally shows signs of kindness and compassion, the play still ends with her having lost everything but not having learnt anything, and again following the war instead. For Brecht it was not important to release her character and make her see because he was more

concerned with making the audience see (Brecht in Hecht 1979, p. 90), which happens partly through that exact ignorance Mutter Courage displays. Although it reads like a tragedy, Mutter Courage does not follow an Aristotelian plot where the protagonist heads towards an inevitable destiny and is not able to change his fate. On the contrary, the unfolding of the story offers Courage multiple opportunities to change her ways and save her children but she seems incapable of learning from previous disasters. While the storyline is tragic and sad, and caused the audience of the play's first night in Zurich to feel empathetic with Courage, Brecht subsequently shaped her character in a way that prevented total empathy. Instead of empathy he wanted to stimulate complex seeing, which would enable the audience to realize that "contrary to the rich, poor people cannot expect to profit from war" (Brecht in Hecht 1979, p. 9).

Additionally to *Verfremdung*, which is built into the story, the better-known expressions of the *V-Effekt* can be found in the production elements of Brecht's plays, and Mutter Courage is no exception to this. Because the technical *V-Effekte* of the play are too numerous to be discussed in their totality, I limit the discussion to two elements: music and *Gestus*.

Music

Muzak, as Brecht called traditional interpretations of music, was suitable for elevators or supermarkets but had no place in his epic theatre (Bentley 1998). Music, on the other hand, has found its application in most of Brecht's plays, as well as in *Mutter Courage* as one of the *Verfremdung* agents. As with every element in Brecht's epic theatre, music was meant to create a break in the flow of a play so that the audience would take notice and not get carried away by catchy melodies. Songs were not optional parts of Brecht's plays but their lyrics provided vital content, which was required to add information and sense to the play. Expressing his apprehension of the traditional use of music Brecht writes:

A single glance at the audiences who attend concerts is enough to show how impossible it is to make any political or philosophical use of music that produces such effects. We see entire rows of human beings transported into a peculiar doped state, wholly passive, sunk without trace, seemingly in the grip of a severe poisoning attack. Their tense, congealed gaze shows that these people are the helpless and involuntary victims of the unchecked lurchings of their emotions (Brecht in Willett 2001, p. 89).

In Brecht's view theatre music should be used to interrupt, and he employed several approaches to achieve this objective. For example, in some of his plays the orchestra came onto the stage to remind the spectator to pay particular attention.

In the case of *Mutter Courage* the ensemble was visibly placed in a loge next to the stage, and before each song that did not emerge from the plot, an illuminated Musikemblem – a device that consisted of trumpet, drum, bunting and light globes – was suspended from the ceiling and lit up to mark a change from text to music (Brecht in Hecht 1979, p. 12). Paul Dessau³¹ composed the music for *Courage* and ensured that it was counterintuitive compared to traditional theatre music. For example, in Scene 5 of the play Kattrin fights with and threatens her mother to get hold of linen shirts, which she wants to use as bandages for some wounded peasants. Instead of applying a score that would highlight the anger and tension in this scene, Dessau had his ensemble play a Siegesmarsch (military marching music played for victorious home-comers). By being out of context, the music contradicts the drama that is taking place, and creates an interruption that is impossible to ignore. Additionally, whenever the music had lyrics, Brecht urged his actors to not simply transition from speaking to singing as they would in an operetta but to obviously change from one activity to the other. He “required the actor not to sing but to show a man singing” (Kowalke 1994, p. 254).

Gestus

This concept of showing was an important element in Brecht's epic theatre. Acting under Brecht was done in a very specific way, which was opposite to traditional (naturalistic) acting in the sense that he asked his actors to not pretend to be the character but to show the character. To provide actors with some guidance on how to accomplish this kind of showing, Brecht, borrowing from Lessing and Charlie Chaplin, developed the concept of Gestus, which Willett (2001) translates for English-speaking readers as follows:

‘Gestus’, of which ‘gestisch’ is the adjective, means both gist and gesture; an attitude or a single aspect of an attitude, expressible in words and actions (p. 42).

As such, Gestus did not denote a particular gesture or gesticulation but included the whole “ensemble of movements of the body and the sound, rhyme and inflection of the voice and

³¹ Paul Dessau was a German composer, who collaborated with Brecht numerous times. Hence he was fully aware of the specific nature of music that Brecht required for his epic theatre.

anything pertaining to the general portrayal of a character” (Weber 2000, p. 41). For the portrayal of the character, the actor had to adapt a specific form of showing, which has been best described by Brecht’s (in Willett 2001) ‘Street Scene’:

An eyewitness demonstrating to a collection of people how a traffic accident took place ... the demonstrator acts the behaviour of driver or victim or both in such a way that the bystanders are able to form an opinion about the accident ... it is important that he should not be too perfect. His demonstration would be spoilt if the bystanders’ attention were drawn to his powers of transformation ...the actor must remain a demonstrator; ... [h]e must not go so far as to be wholly transformed into the person demonstrated (p. 121ff).

This kind of acting requires the actor to create distance between himself and his character, which he can achieve, for example, by observing the emotions of the character critically and avoiding simply slipping into these emotions. As with other elements of *Verfremdung* this kind of acting is meant to purposefully create an interruption, which would circumvent empathy and heighten alertness and awareness, encouraging the audience to engage in critical thinking.

Because of the tragic development of the story, the *Gestus* of showing was particularly important for the character of Mutter Courage. The actress had to pay attention to not focus on Courage’s emotional tribulations but instead show her corrupted business character, suppressing any sign of humanity. For example, in Scene 1 as described earlier, where Eilif gets enlisted into the military, *Verfremdung* is demonstrated in the story in that it refrains from a tragic plot by having Courage immediately return to business as usual. However, based on the use of *Gestus*, another *Verfremdung* takes place in the same scene. After she finds Eilif missing, “the actress shows Mutter Courage’s being consternated instead of being horrified and worried out of her mind. But the actress builds in a twist in her portrayal of the character by making Courage throw the bunch of belt buckles into her wagon, as well as not returning Katrin’s gaze” (Brecht in Hecht 1979, p. 27). This must strike the audience as odd. They probably wonder whether this is a sign of despair, and whether Courage does care after all? But isn’t she an unscrupulous businesswoman, and not a motherly person? Could there maybe be more to her character than the obvious? This small gesture further demonstrates the duality of *Gestus* in that the actress manages to demonstrate what Brecht denotes as the “not ... but” attitude (Brecht in Willett 2001, p. 137). This particular way of acting highlights what a character is doing and implies what they are not doing at the same time, or to express

this in a formula, he did A but could have also done B. It is a mode of highlighting the elements of potentiality and choice in various situations. In the case of Mutter Courage the actress shows the character's decision of moving on with business as usual, but at the same time had the potential to pay attention to and express her feelings of anguish.

A similar duality is demonstrated in Scene 12 where Courage pays the peasants for Katrin's funeral. By how she holds herself, bend and blunt, the actress shows her character's devastation, but at the same her focus on money. Mutter Courage takes money from a purse, taking some coins out, returning one to the purse, and counting the others slowly into the farmer's hand (Brecht in Hecht 1979, p. 76), as if it pains her to part with the money. The estrangement is further increased by her hasty departure before the funeral because she wants to follow a passing regiment to revive her business. This presentation of Mutter Courage must outrage the audience, leading to an interruption of their expectations or habitual thinking pattern. Instead of simply perceiving Courage as selfish, and a bad mother, the audience, after having seen the actress alluding to the character's caring side, must ask why she behaves the way she does. This kind of questioning is what enables new insights, and what Brecht had in mind for his audience to experience.

Verfremdung in Management Education

Returning to the earlier assumption that the shortcoming of traditional management education is its focus on functionality and a neglect of the need for critical reflection, Brecht's ideas on Verfremdung present an opportunity to enrich the learning environment. One of the key components of significant reflection is a multi-layered exploration of the depths of what we take to be unalterable and unreflected reality. Uncovering the artificially constructed and contrived nature of what is taken to be 'natural' is a major element of the Brechtian *V-Effekt*, which can operate in management education on two levels.

First, as exemplified in the above discussion, Brecht's Verfremdung is a challenge to habitual seeing and thinking. It is a contradiction between the known and the unknown, which has been acknowledged to be a necessary element to 'switch cognitive gears' (Louis & Sutton 1991). These two authors argue that, in order to switch from habitual thinking patterns to a consciously more involved cognitive mode, the individual has to be confronted with conditions that require such a switch. For the purpose of anecdotal evidence they provide a

range of quotes from Heidegger, Langer and others that describe this kind of necessary condition for a switch to take place, for example:

[i]f we encounter in our experience something previously unknown and which therefore stands out of the ordinary order of our knowledge, we begin a process of inquiry (Schütz 1964, p. 105, cited by Louis & Sutton 1991, p. 59).

A similar suggestion has been made by developmental psychologist Jean Piaget (1977), who hypothesized that a disequilibrium, which means a cognitive conflict that occurs when the current knowledge is insufficient to solve a problem, is necessary in order for students to develop intellectually. Hedberg (1981) concurs that “learning is typically triggered by problems” (p. 16, cited by Barrett 1998), which further corroborates the suggestion that without contradiction, intellectual growth and novelty eventually will arrive at a standstill.

Such a standstill is for management/executive students even more likely to happen than for children, for example. Too often managers are insufficiently challenged to question their knowledge and reasoning, which is caused partly by time constraints but also by an underdeveloped capacity for critical reflection. As reiterated throughout this chapter, the traditional business school curriculum is more about learning new tools which can be applied to predefined situations. Numerous scholars have noted this bias towards an analytical, technical focus on management education, with a lack of room for developing complex reasoning skills in recent decades (Starkey & Tempest 2009; Welsh & Dehler 2007; Gabriel 2005; Goshal 2005; Parker 2002; Pfeffer & Fong 2002; Dehler, Welsh & Lewis 2001; Reed & Anthony 1992; Porter & McKibbin 1988; Schön 1987). Judging by the ongoing debate about this limitation of management education, it seems reasonable to suggest that *Verfremdung*, which contains contradiction, can provide the external condition required for ‘thinking’. In his examination of provocation for entrepreneurship education, Hjorth (2011) confirms this notion of contradiction, suggesting “people are uprooted from the limits of their present experiences” (p. 58).

The second key element of *Verfremdung* is its element of possibility, which is required to motivate action. Possibility in *Verfremdung* becomes apparent in Brecht’s incessant effort to unveil the changeability of situations opposed to inevitability. As suggested earlier in this chapter, art is believed to hold the capacity for making the percipient conscious of previously unconsidered potentiality. Winner et al. (2006) found one of the benefits of arts education to

be the development of envisioning skills. To imagine possibilities is an important stepping stone towards changing a status quo

Verfremdung's two elements of opportunity and possibility are interconnected then. Contradiction challenges the status quo while the element of possibility opens the space to venture away from the present to the future. But it is up for debate how this future could look. Verfremdung doesn't automatically lead to reflection and new insights; it merely sets the scene and hence can be particularly useful in an educational context. Brecht's concept of Verfremdung has the potential to lead the learner through a three-stage process. First is the point of departure from insufficient understanding. Second, the subject content is estranged, which interrupts habitual seeing and thinking, and creates a temporary state of not understanding. And third, as a result of the process of interruption, the student is not only able to view the content from a different perspective, but is provided with thinking space for critical reflection without pre-defined objectives that leads to a deeper understanding.

Chapter Summary

This chapter started out with an overview of the two different sides of habitual thinking and acting. On the one hand they play a vital role in daily personal and professional undertakings, and on the other, by offering readily available information, they restrict the thinking scope and, depending on individual preference, can make new knowledge appear superfluous. With didactic approaches that follow scientific models, and focus on functionality and skills traditional business schools neglect the need to break through habitual thinking patterns. In accordance with numerous organization and management studies scholars I have suggested that a refocus on critical reflection is particularly desirable if business schools want to develop managers that possess complex reasoning skills and the capacity to change their perspective, if necessary.

My investigation explored if and what the arts can contribute to the endeavour of reviving critical reflection in management education. However, instead of looking at arts-based teaching in general, I focused on Bertolt Brecht's Verfremdung, which is one particular artistic element that holds under-researched potential for management education. To bridge the arts with education I have posited the investigation in Mezirow's transformative learning theory. Critical reflection plays a crucial role in perspective transformation, which is at the heart of transformative learning. Mezirow suggests that it is brought about by disorienting dilemmas

that surface underlying assumptions and require a readjustment of existing meaning perspectives. Arts-based teaching has long been recognized as a method that provides a different kind of knowing and knowledge, and opens up alternative thinking spaces. Brecht was concerned with educating and emancipating the audience, and these are the characteristics that he offers to a pedagogical context. Because *Verfremdung* is an umbrella element that can be and has been connected to a number of artforms, the following chapter will position it in the context of the pedagogical use of film.

2. Teaching with Films

Of the numerous arts-media that can be and have been applied in an educational environment, I focus in this chapter on one of them in particular – namely, film. My literature review first examines the current body of knowledge in support of the advantages offered by the pedagogical use of film. I continue this thread with an account of the two major streams, *film as illustration and film as thesis*. I then suggest a third theme, *film as verfremdung*, based on Brecht's concept of *Verfremdung* as an addition to this field of research. Brecht was concerned primarily with theatre, yet I suggest that *Verfremdung* can also be created with films because theatre and film, despite their differences³², share similarities, for example the acting of a story, that enable this transfer. The proposal for film as *verfremdung* is based on Brecht's assumption that *Verfremdung* creates a temporary state of not understanding, which creates a void that allows learners to surface their everyday habitual ways of thinking and acting, leading to reflective thought.

Power of the (Moving) Image

It is sometimes said that a picture³³ is worth a thousand words. However, where past societies valued visual communication for its ability to provide rich accounts of their, admittedly simpler, world the industrial age marked a preference for tangible knowledge, expressed in scientific language. This shift allowed language and textuality to become the working language for the majority of institutions – business, education and general experiences alike – which contributed to the structural change towards bureaucratic, control-focused societies where the visual was reduced to an inferior function (Hatch 1997; Arnheim 1980). The global educational revolution with its expansion of educational systems (Fiala & Lanford 1987; Boli, Ramirez & Meyer 1985; Craig 1981) only further reinforced and manifested the dominance of language.

Yet, from the perspective of accessibility images are superior to language. Signs of spoken and written language have to be learned, a process with varying degrees of difficulty for

³² The differences include, for example, that theatre as a live performance establishes a different connection between actor and audience, or that movies are capable of effortlessly transporting the audience to different places and times.

³³ The following discussion does not distinguish between pictures and images.

individual learners. Foreign language learning exemplifies the complexity of linguistic symbols. Immediate translations of words are often problematic because semantics are contextually determined and evolve over time, which means that sense making with and comprehension of language are determined by a number of factors (Monroy-Casas 2008; Prince 1993). However, variations exist not only between different languages but also within the same language. Traditionally, scientific language, for example, uses very particular linguistic semantics. First-year university students often struggle with this specific use of language and need time to become proficient in its use. And in everyday life language subgroups distinguish themselves through a particular way of speaking, like Cockney English speakers. This specific form of English differs not only by accent but also by its use of words, which don't make sense for someone unfamiliar with its rhyming logic. Words and sentences need to follow a particular structural logic to make sense, and the communicator requires prior knowledge of this logic.

Brecht, for example, in his pursuit of interrupting habituated perception patterns purposefully dispensed with conventional speech and dialogue rules in his scripts, which can be illustrated with a verse from his adaptation of *Edward II*. The first version of the verse follows a traditional rhythm logic, while the final result is a collection of jumbled words, which breaks the contextual language conventions and makes understanding difficult, if not impossible. For Brecht this absence of linearity served as one of his V-Effekts to interrupt the spectators' habituated sense-making process. Translated by Willett (2001, p. 116) the original version reads:

I heard the drumbeats ring across the swamp
Horses and weapons sank before my eyes
And now my head is turning. Are they all
Now drowned and dead? Does only noise still hang
Hollow and idle on the air? But I
Should not be running

Brecht's purposeful interruption of the rhyme results in:

After those drumbeats, the swamp gulping
Weapons and horses, all turns
In my mother's son's head. Stop panting! Are all
Drowned and dead, leaving just noise
Hanging on the air? I will not

Run further

Because language is a learned human faculty the same requirement for linearity applies to other fields where language is the main form of communication. Language establishes a kind of exclusivity; any sense-making capacity is limited if one lacks knowledge of the corresponding code or the ability to follow its logic. The need for logic and linearity furthermore restricts the capacity for exploration and new knowledge because it imposes a framework that mostly dictates the way of thinking. Brecht's above use of language illustrates its potential when the framework is punctured with strangeness, allowing questions and reflections to seep through. These questions are like tiny holes in a blacked-out window, which trigger the viewer's curiosity and lead him to realize that there must be 'something' hidden behind the black surface that can be explored.

Language undeniably plays an important part for most aspects of contemporary life but an overemphasis of it in the past, in particular its overemphasis in scientific scholarship has closed off other important ways of perceiving, learning and knowing. This is particularly regrettable because, while language is a unique human quality, the visual part of the brain nonetheless exceeds its linguistic counterpart. By being a primal sense, like the sense of smell, it can offer access which is either more immediate or less dependent on existing knowledge for understanding, which insinuates its didactic potential (Mathewson 1999; Matussek 1999; Barry 1997). In contrast to language, then, pictures provide a more instant access to information. This natural visual capacity has been illustrated, for example, by the study of the Kenyan Pokot tribe by Hobbs et al. (1988). This tribe had had very limited exposure to television and other modern-day media. The researchers found that most tribe members displayed an overall ability to comprehend and recall the meaning of the visual representation they saw, suggesting that images provide a more immediate understanding than linguistic or textual accounts. This immediacy has been acknowledged by different scholarly disciplines, which have found that the understanding of abstractions benefits from the addition of illustrations (Arnheim 1969). Fields like law, and natural and social science, which traditionally rely on the written and spoken word to express their scientific knowledge, increasingly incorporate visual information in their work (Schnettler & Pötzsch 2007; Hampe 2006; Röhl 2003; Fischman 2001).

And despite *Huckleberry Finn's* (Mark Twain, cited by Miller 1992) objection to purely visual depictions:

A good legible label is usually worth, for information, a ton of significant attitude and expression in a historical picture. In Rome, people with fine sympathetic natures stand up and weep in front of the celebrated "Beatrice Cenci the Day Before her Execution." It shows what a label can do. If they did not know the picture, they would inspect it unmoved, and say, "Young Girl with Hay Fever," Young Girl with her Head in a Bag (p. 62),

pictures offer accounts of reality or truth that would otherwise be inaccessible or, in Gross's (2010) words, they "embody a perceptual and cognitive invitation that eludes and transcends verbal language" (p. 278).

The re-acknowledgement or re-acceptance of multiple access points for inquiry and knowledge have led in recent decades to a turning away from a language-focused epistemology to an increasing acceptance of images and visual knowledge. Yet, while it is possible to estrange language, as Brecht's above example has illustrated, and Chapter 1 has highlighted that different art forms lend themselves to engage learners in ways that textbooks cannot, I engage the visual medium of films for the present research. What I have tried to establish with the above discussion is that i) it is more difficult to achieve estrangement by the sole means of pedagogical and/or everyday language, and ii) pictures can provide a different access to thinking, which complements the prevalence of textual learning.

Pedagogical Use of Films

The past decades have seen a growing number of academic works that argue for the inclusion of the arts, valuing it as a different method of exploration. Those scholars acknowledge that 'the function of both science and art is to exaggerate, provided that what is exaggerated is truth and not falsehood (Baran & Sweezy 1966, cited by Parker 2002, p. viii). Scientific and artistic exaggerations are not aimed at the precise reporting of events but at the overall meaning of these events. Representing the increasing voices against the science-fiction-split, Cziarnawska and Guillet de Monthoux (1994) have suggested that science and stories, for example, are in the same category, the narrative. They demonstrated that the process of writing case studies for business schools is just as creative as writing fiction. Information and data have to be tweaked to keep the case company anonymous, and plots, which are based

on real-life situations, get embellished with fiction to make the information more accessible. And Philips (1995) has argued that social science and narrative fiction both have an interest in the social world and its description, yet at the same time they are both constructions of the social world. Hence, instead of perceiving scientific and artful knowledge as polar opposites it is more useful to see them as “symbolic forms with complementary qualities” (Irgens 2011, p. 15).

This chapter then, continues the discussion of art begun in Chapter 1 by focusing on and arguing for the pedagogical value of the visual art of films³⁴, which, while it is a mixed-medium of language and image – and now also of special effects and techniques – relies heavily on imagery and offers the earlier insinuated benefits of pictorial representations. After all, one can watch a movie without sound but it is not possible to watch a film without the visual element, which would be more akin to listening to a verbal account of a story³⁵.

The pairing of films and education is not new, and its considered benefits have been equally supported and rejected. In the late 1970s and 1980s a number of scholars (Dixon & Judd 1977; Schramm 1977; Clark 1983) argued that studies in television research, which explored the relationship between media and learning, had revealed that not one specific media contributed especially to the learning outcomes of students. Clark particularly promoted the view that media are mere vehicles that deliver instruction but do not influence student achievement “any more than the truck that delivers our groceries causes changes in our nutrition” (Clark 1983, p. 445). While he reiterated his position with subsequent research, he also made concessions to the growing variety in media, and readjusted his early statement with the suggestion that while media don’t influence learners’ achievements, they may be able to vary learners’ motivation (2001). This concession resonates with Kozma’s (1994) proposition that instead of focusing on the question ‘does it work’, research on media effects should investigate “[i]n what ways can we use the capabilities of media to influence learning for particular students, task, and situations” (p. 18). The past decades have seen an increase

³⁴ I will use the expression film and movie interchangeably in the following discussion. Also, I don’t discriminate films based on their status as Hollywood mainstream or arthouse. This is to say that for the present discussion I accept a Steven Spielberg movie to be art just like a Lars von Trier movie. I leave it for the percipient/spectator to decide on the aesthetic value.

³⁵ The visual impaired for example have to receive additional clues to the story because film dialogues are supported by images and don’t have to follow the usually strict semantic logic.

in research on the rationale for using film – as one of the now numerous available media – from a cognitive perspective of engagement through visual attention (Kozma 1991; Baggett 1989), to explanations based on adult learning theory that learners believe that film contributes to an increase in their understanding of a topic (Downey et al. 2003; Knowles 1990).

Various scholarly disciplines have long exemplified the benefits of using feature films for a range of teaching areas. The social sciences, for example, have a long-standing tradition of using films as case studies. It has been argued that audio-visual material enables students to experience ‘real-life’ situations, which otherwise wouldn’t be available to them (Koch & Dollarhide 2000; Burton 1988; Fails 1988; Prendergast 1986; Smith 1982). In the Weberian sense of observational *Verstehen*³⁶, films can assist in capturing and explaining the intimacies and complexities of social and organizational life without the time and expense of the student leaving the classroom (Burton 1988; Smith 1982). In sociology, popular films are called upon to demonstrate a variety of issues that range from the international nature of selected domestic social problems (Dressel 1990) to the sociology of popular music (Groce 1992). And Burton (1988) compiled a list of movies that illustrate sociological topics, like adolescence, or youth in the 60s, for example, based on Prendergast’s (1986) suggestion that:

like sociology, film exposes the viewer to social worlds beyond the orbit of personal experience ... The film accomplishes on an empathetic level what sociology accomplishes through historical and cross-cultural comparison: creating the capacity to understand oneself by understanding the broad social context (p. 243, cited by Burton 1988, p. 264).

In the field of psychology the difficulties of researching emotions in a laboratory setting have been overcome by using films to elucidate the emotional states of amusement, anger, contentment, disgust, fear, neutral, sadness and surprise. The field of marketing, in particular, continues to draw on this research (Westermann et al. 1996; Gross & Levenson 1995).

Organization and management studies have similarly adopted the idea of using feature films for educational purposes. In the field of management education the general consensus is that films can engage students intellectually and emotionally in a storyline and thus contribute to a better understanding of a concept or theory (Bell 2008; Hunt 2001; Scherer & Baker 1999; Marx & Frost 1988). This is particularly helpful for undergraduate courses where students

³⁶ See Michael Martin (2000) for a detailed discussion of the sociological concept of *Verstehen*.

usually arrive without prior work experience and where films enable them to build knowledge by substituting the lacking personal experience (Philips 1995). Also, the formal business school discourse on organizations often omits intricacies like emotions and politics that influence a range of organizational issues. Here films present an exaggerated, dramatized picture of organizations offering a unique, sometimes more transparent view of organizational life (Buchanan & Huczynski 2004; Hassard & Holliday 1998).

Foreman and Thatchenkery's (1996) analysis of the film *Rising Sun*, for example, provides a good case of how some of the topics which concern organizational life are presented in a movie. The film informs the audience about the struggles of a transplant organization, a Japanese company in the U.S. Despite the company's focus on control and predictive power, its managers have to grapple with the uncertainty and lack of control, which Foreman and Thatchenkery use to view chaos theory from a different angle. Their particular reading of the film also explores the topic of cross-cultural barriers that often occur in organizations recently established in a foreign country. Other authors have found films a valuable extension of the regular lecture-style teaching of organizational behaviour topics, which are often not openly discussed in textbooks, such as sexual harassment in the workplace (Comer & Cooper 1998) or some of the more controversial ethical issues surrounding corporate restructuring (Graham, Peña & Kocher 1999). With a focus on frameworks and concepts, Gallos (1993) used the films *Dead Poet Society* and *Karate Kid* to teach about reframing. Baker (1993) also used the latter one to demonstrate the basic concept of French and Raven's bases of power. Influencing others has been taught with the help of *The Magnificent Seven* (Huczynski 1994; Michaelsen & Schultheiss 1988), and the film *12 Angry Men* has been employed to train the principles of dialogue (McCambridge 2003).

These above examples are individual cases where lecturers from a wide range of scholarly fields have reported on their experiences from teaching with films. The discussion has been helpful in establishing the view that the use of films holds pedagogical value, which is an underlying assumption of the present research. Yet, while they provide valuable ideas and suggestions, the above-mentioned examples are mainly one-off reports, with most of the lecturer-authors describing how a specific subject could be taught with particular movies. There are, however, two main strands of literature that provide a rationale for the use of film based on their respective objectives. These two are investigated more closely in the following

part of this chapter because they are key stepping-stones for my suggested extension of film as *verfremdung*.

The first, and probably most widely adopted approach, is film as illustration, which has been cultivated by Champoux (2005; 2004; 2001; 1999a). This particular method focuses on movies' ability to communicate abstract textbook facts in a visual form to make them more accessible. Champoux's approach is mainly directed at undergraduate students who appreciate a simplification of unfamiliar scientific learning and knowledge.

The second approach is not necessarily opposed to illustration but suggests that the use of films in an educational setting need not be restricted to this objective. Huczynski and Buchanan (2007; 2006; 2004) have proposed that movies are narrative reflections of reality that allow theory to surface and provide deeper insights into organizational phenomena not discussed candidly in textbooks. To distinguish their specific approach they have coined the term film as thesis.

Film as Illustration

In his efforts to distribute the use of film to a wider audience, Champoux (1999a) suggests that films can not only be read like text but can be substituted for it in order to simplify complex content for students:

Film scenes can offer a visual portrayal of abstract theories and concepts taught in organizational behavior and management courses. Inexperienced students will likely benefit from the use of film because of a greater feeling of reality. Showing concepts through different film scenes also shows the application of these concepts in different situations (p. 206).

Champoux's argument is based mostly on his experience as a practitioner, while his theoretical evidence is anecdotal. He quotes the assumption of the realist film theorist Siegfried Kracauer that film has the ability to "make one see and grasp things which only the cinema is privileged to communicate" (Kracauer 1973 cited by Champoux 1999, p. 207). Films possess particular characteristics that both differentiate them from other media and provide them with an ability to highlight specific aspects of issues or situations that would go undetected by the naked eye. One of the technical features Champoux mentions is the camera's ability to intensify perception through close-up shots. This can be observed in the movie *12 Angry Men* where the camera zooms in on jury members of a murder trial. This

particular camera perspective shows the strain and emotions brought about by complex decision-making processes, and which textbooks are not able to communicate with such intensity (p. 207).

While not conclusive but somewhat more substantiated, Champoux also draws on cognitive research to make a case for the pedagogical use of films. He suggests the need for incorporating visual media in a learning setting because of the differences of left and right brain functions, because pure textbook learning challenges only one part of the brain (Champoux 2005). The strength of Champoux's argument, however, comes from his praxis experience. He provides numerous examples – over 160 movies – of films that illustrate specific concepts. For example *The Coca Cola Kid* demonstrates resistance to organizational change, *Apollo 13* gives an example of problem-solving under pressure, and *Scent of a Woman* metaphorically clarifies ethical behaviour. Champoux finds that, because most of today's students grow up with computer games and television, films can provide an easier access to understanding concepts and theories. This assumption that students are more at ease with visual stimuli and that it is only natural to adapt course material to their visual learning style instead of forcing them to re-learn how to learn has been reiterated by a number of scholars (Smith 2009; Comer & Holbrook 2005; Comer 2001). And related to the earlier discussion in this chapter on the benefits of pictures/images, Carney and Levin (2002) suggest that "pictures are part of the human experience" (p. 23), and that the use of pictorial illustrations can expand student's text learning capability by making information more tangible. Images offer more "pegs" (Kozma 1991) than linguistic symbols, which means that images are more easily connected with existing knowledge and contribute to a better processing of information overall. However, some scholars have pointed out the risk that students confuse filmic learning with entertainment and tune their brains to a less attentive level. This would need to be taken into consideration and a pedagogical counter-strategy developed.

As mentioned earlier, Champoux has identified approximately 160 film titles that he has used for the teaching of various subjects, mainly relating to organizational behaviour. Through his numerous years of teaching practice with film, Champoux (1999a) has carved out eight main functions (Table 2):

| | |
|--------------------|-------------------------------|
| Film as case | Film as experiential exercise |
| Film as metaphor | Film as satire |
| Film as symbolism | Film as meaning |
| Film as experience | Film as time |

Table 2. Champoux's functions of film as illustration

Although each of these eight functions of film has a different teaching goal, they have in common that they all assist in illustrating theories and concepts that are regularly taught in undergraduate courses. Or to frame this description in terms of Mezirow's transformational learning, films as illustration don't transform perspective, they provide perspective. This format of using film is about representational reality and looks at organizational life and structures as a status quo that must be dealt with. While this approach has its merits, the scientific-like knowledge it distributes contributes to the dilemma that management education has been struggling with for some time. The illustrative way only scratches the surface of organizational complexities. By using it as a representation of reality without offering alternative perspectives it already focuses students' attention in a certain direction. This observation becomes clearer with the help of the following example (Champoux 1999b) that demonstrates how the movie *The Firm* is used to present an established view on workforce diversity – in this case the absence of diversity:

The Firm: Mitch McDeere (Tom Cruise) graduates from Harvard Law School with honours. Many top law firms vigorously recruit him. Mitch chooses a small Memphis, Tennessee, firm with a large starting salary, a new Mercedes and a low-interest mortgage. He quickly learns that "The Firm" is entangled in a web of murder and corruption.

These scenes [start and stop information provided on page 312] start at the beginning of the film, including the credits. They end after Mitch and Abby (Jeanne Tripplehorn) discuss accepting the offer. These scenes clearly show the absence of diversity in the law firm. As Abbey said, 'All white, all male, all married'. Women are present but in traditionally female jobs as secretaries and clerks. The only people of colour who appear in the scenes are waiting staff and members of the jazz band (p. 314).

Champoux's main objective for the use of film as illustration is that the illustrative power of movies makes the usually abstract content of management and organizations textbooks more tangible for inexperienced undergraduate students. The above example demonstrates that

this form of teaching resembles what Kegan (2009) described as informational learning, which “[c]hanges what we know” (p. 43). Or, in other words, informational learning expands the learners’ amount of knowledge without providing him with the space to critically question this information.

Film as Thesis

Realizing film as illustration as problematic in the sense that it doesn’t help learners to develop analytical thinking skills, Huczynski and Buchanan (2007; 2006; 2004; 2001) have extended the use of film as a teaching tool with film as thesis:

This approach relies on the observation that film is rarely neutral, but presents us with a point of view that we are invited to inspect in relation to our own experiences and values. ... The point of view is in many film narratives an implicit theory, linking events and actions to consequences in a given context (Huczynski & Buchanan 2004, p. 707ff).

Film as thesis is further based on the assumption that teaching and learning through stories seems to be ingrained in human nature, and that most individuals still make sense of the world through narratives. Gabriel (2004) suggests that facts on their own rarely make sense and it is the chronology or sequencing of narratives, the way events are woven together, that not only allows the audience to understand the connections between events, characters and outcomes but also enables the percipients to make sense through these links. But opposed to the modernist view on narratives as representations of reality, this approach takes a postmodernist view on narratives, which recognizes that “film does not reflect ‘reality’; film is ‘real’” (Huczynski & Buchanan 2006, p. 79). It rejects the belief in an objective reality, which can simply be recorded and portrayed in films or television. Film is real in the sense that participants in the film-making process for example the author of the script, the director, the actor and others contribute their particular experiences and interpretations of events, thus creating a cinematic reality

When audience members argue that a film is ‘unrealistic’ or ‘just a movie’, they have different expectations of certain social and organizational situations from what they saw on screen. They seem to be unwilling to suspend their disbelief and accept the possibility of different facts and experiences from what they are used to. Science fiction reality might seem more far-fetched than a documentary on butterflies in Mexico, but so was the possibility of

recording pictures and animating them into a movie in the late 19th century. Huczynski and Buchanan's requirement that the spectator dispenses his disbelief, or in other words their request that the audience enters into a narrative contract with the material/author, leaves the audience vulnerable to propaganda and spin-doctors. This is also a risk for the previously described film as illustration approach in that distributing established perspectives as natural phenomena removes the space for learners to question and choose what they accept as truth or a truthful account. But assuming that disbelief is suspended and the owner of the narrative is not using it as a means for oppression, Huczynski and Buchanan suggest that film narratives can not only be used as sense-making devices but also analyzed, just as normal research data can be explored to find connections between events, test explanations and help make decisions. It is suggested that because films have a different background and purpose to scholarly works they often can widen the scope of available knowledge on organizations and organizational behaviour in a creative way.

Based on the three research traditions of 'narrative theory, organization representation and process theorizing', Buchanan and Huczynski (2004) argue for the use of film as a means for introducing controversial topics not normally covered in organizational behaviour. This method provides an integrated rather than specialized view of different aspects of organizational behaviour through the use of extended narrative and multiple actors. Narratives are part of organizations. They reflect, influence and constitute organizational life and organizational values, and beliefs are shaped and transformed through narratives (Putnam et al. 1996). Narratives can be seen as a sensemaking device for most, if not all, social situations (Weick 1995), as people rarely think in isolated terms of events in their life but weave them into stories to make sense of those events and to relate them to their peers. The expression "so what's your story?", for example, is an invitation to communicate one's beliefs, ideas and general take on life in a sequential manner so that the audience and in the end the story-teller himself can make sense of it. Huczynski and Buchanan argue that when process theory is applied to explore the sequence of events (Pentland 1999) in film narratives, it offers an opportunity to show the complex interaction of different influences that shape a final outcome. Treating it like a research report on the complex, situational and contextual nature of the lived experience of management in organizations, it not only illustrates theories but provides explanations for the outcomes of political and emotional developments (Huczynski & Buchanan 2006; Buchanan & Huczynski 2004).

Narrative fiction taps into channels of understanding which are unique in the sense that a narrative account of events is almost always concerned with the process of action, which unfolds chronologically in a certain context and thus establishes causality (Huczynski & Buchanan 2006; Hobbs 1998). Variance theory, as opposed to process theory, disregards the chronology and context of events for the purpose of analysis, which results in a less rich picture of organizational relationships and its consequences. For management education this means that analyzing events in a narrative way can unearth underlying theory important for organizations and their functionality. Since narratives have no one ‘correct’ interpretation (Huczynski & Buchanan 2001) but numerous readings depending on the background and existing knowledge of the audience, they open the opportunity to discuss and discover less conventional ideas. They can also help overcome the traditional narrow technique-dominated and discipline-based character of management instruction.

Huczynski and Buchanan (2006, p. 82) show the different modes of using film in management education, divided into illustration and thesis, as shown in Table 3:

| Film as illustration | |
|-----------------------------|---|
| Demonstrating relevance | Individual differences in work motivation are illustrated in <i>Bringing out the Dead</i> |
| Motivating the boring | Characteristics of bureaucracy are illustrated in <i>Crimson Tide</i> |
| Concretizing the abstract | Individual power bases are illustrated in <i>Alien</i> |
| Changing the mode | Prompting critical thinking about capitalist greed with <i>Wall Street</i> |
| Reframing the perspective | Viewing events first from a motivation perspective then from an influencing perspective in the <i>Magnificent Seven</i> |
| Comprehending complexity | Illustrating links between job satisfaction, work motivation and social and family life in <i>American Beauty</i> |
| Revealing the hidden | Illustrating organizational misbehavior and illicit employee-customer relationships in <i>One Hour Photo</i> |

Table 3. Modes of using film in management education (from Huczynski and Buchanan 2006, p. 82) – (continues)

| Film as thesis | |
|-----------------------------|--|
| Exploring the controversial | The thesis that (female) leaders must be ruthless in <i>Elizabeth</i> |
| Exploring topic integration | The thesis that management decisions are a product of interpersonal influence, group dynamics, organization politics, the role of advisers, and contextual emotional and temporal factors, as well as information, in <i>Thirteen Days</i> |
| Exploring contextualization | The thesis that project managers require a blend of technical and organization |

Table 3. Modes of using film in management education (from Huczynski and Buchanan 2006, p. 82) – (continued)

Huczynski and Buchanan have analyzed numerous films, and the following is just one example out of many to make their approach more transparent. For the movie *Contact* (1997) with actress Jodie Foster, Huczynski and Buchanan (2004) and their students developed the thesis “Integrity loses, deceit wins. Political skills are as important for the project leader as technical knowledge and expertise” (p. 711). The exploration process begins with a lecture on power bases, followed by viewing of the movie or sequences of it to illustrate how power is situated in organizational context. Students are being asked “to read the movie like a thesis, considering three main questions:

1. Can you identify examples of organization political skill?
2. Can you identify illustrations of organization political naivety and ineptitude?
3. To what extent does the main argument of this science fiction movie generalize to the real world of organization politics?” (p. 714)

The movie or relevant sequences are shown, where students focus on these questions. After the viewing a debrief allows students to share their observations. For the first question then, examples of student responses were recorded as:

Drumlin Skills (What organizational political skills does Drumlin display?)

- dressed appropriately for the occasion
- presents himself as an insider, like the key players
- adopts leadership behaviours, giving instructions to Ellie and to her team

Ellie’s Mistakes (What organization political mistakes does Ellie make?)

- she has a little-girl-lost image
- she plays a one-move chess game, not thinking ahead, no plan
- has no understanding of how she is perceived by the power brokers (p. 715)

While Huczynski and Buchanan provide no conclusive description of how they then arrived at the thesis that ‘integrity loses and deceit wins’, other than that they nominated students to record suggestions on flipcharts and that the lecturer led the discussion, I imagine that students’ contributions are debated and reduced until the formulation of one key characteristic is possible. In their own words they describe *Contact* as “a vehicle for illustrating the attributes of political skill and for exploring the thesis that integrity is career limiting” (p. 718). However, because narratives can be decoded in more than one way other interpretations are possible. This is demonstrated by Huczynski’s and Buchanan’s (2006) later exploration of this movie that resulted in the thesis “project managers require a blend of technical and organization political knowledge and skill, along with the ability deliberately to deceive others” (p. 82). By adding their three functions to Champoux’s exploration of film – 1. Exploring the controversial, 2. Exploring topic integration, 3. Exploring contextualization – Huczynski and Buchanan (2006; 2004) assist students in developing analytical skills. Additionally, instead of providing an already established view, like film as illustration, this approach helps students to build a perspective that is based on the contextual nature of, in this specific case, power bases. This rationale is a valuable addition to textbook-based informational learning. However, by focusing students’ attention on a specific framework or concept, film as thesis doesn’t provide the space for an exploration of underlying assumptions. The following proposal of film as *verfremdung*, then, aims to provide a further extension of the pedagogical use of films that is detached from technical instruction, and explores opportunities for transformational learning.

Film as Verfremdung

The two main approaches of using films described above have taken on the task to make management lectures more interesting and provide a less sterile view on management and organizations. By teaching about the complexity of working in organizations and illustrating organizational interactions they equip students, particularly undergraduate students, with skills that help them transition from theory to praxis. As such they provide valuable teaching resources. However, as mentioned earlier, the continuous repetition of and focus on existing

knowledge can become problematic because it leads to reification, which means that this knowledge appears to educators and learners as natural instead of something that can be questioned and changed. While film as thesis has advanced and surpassed a mere illustrative purpose, I suggest a further extension in order to provide the space for a learner-based perspective that is not bound by particular management frameworks.

In their classification of arts-based teaching methods into four processes³⁷, Taylor and Ladkin (2009) have identified the prevalent use of film as illustration of essence that:

... can enable participants to apprehend the “essence” of a concept, situation, or tacit knowledge in a particular way, revealing depths and connections that more propositional and linear developmental orientations cannot (p. 56).

Thus when Clemens and Wolff (1999) read *Apollo 13* as thesis for the importance of improvisation, they provide a particular point of view for this exploration, which narrows the space for imagination of possibilities. Taylor and Ladkin’s classification strengthens the argument that, while valuable in their own means, illustration of essence processes don’t help students to step outside their usual mode of thinking and to shift their perspective.

Additionally, the learners’ active engagement can be jeopardized by films³⁸ capacity for evoking empathy. Coplan (2009) defines empathy:

as a complex imaginative process through which a spectator simulates the character’s situated psychological states, including the character’s beliefs, emotions, and desires, by imaginatively experiencing the character’s experiences from the character’s point of view while simultaneously maintaining clear self/other differentiation (p. 103).

This definition of empathy implies that even while the viewer does not become the character, empathy contains the risk that the learner-audience might forget that they can choose their point of view and do not necessarily have to subscribe to what they are presented with. This observation is connected to the critique of the traditional use of movies in the sense that while visual reception of information is from the perspective of accessibility advantageous, it

³⁷ The other three functions are: skills transfer – developing artistic skills that can be appropriated; projective technique – making art for reflection; making – fostering deeper experience (Taylor & Ladkin 2009, p. 56).

³⁸ I refer to films with standard, in its most common sense, entertainment objectives.

is highly susceptible to automated, unconscious processing of information (Frey 2003), which means that students might take to pictures too naturally, without much thinking.

Considering the amount of resources in the form of time, money and manpower that are employed to turn a film into a film experience, it seems reasonable to suggest that distancing and critical observation are qualities that the mainstream film industry actively tries to limit. Brecht developed his epic theatre based on an argument against empathy. Instead of passively taking the characters' point of view, Brecht's epic theatre required his audience to develop active and complex seeing. And while the focus of the present study is directed towards Brecht, other interpretations of *Verfremdung* have similar objectives – namely to make the everyday appear strange and to create a knowledge void that needs to be filled by the percipient. While film as illustration gives perspective, and film as thesis guides perspective, I suggest that film as *verfremdung* might transform perspective by adding complexity and thus reducing simple assumptions.

Brecht demonstrated a life-long interest in films. Not only did he frequently visit his local cinema but his interest and commitment to this relatively new medium is documented with his over forty screenplays that he produced over the course of his writing career. While he continuously tried to sell his film ideas to production companies – in Germany and abroad during his time in exile – Brecht remained rather unsuccessful in this area of artistic expression (Gemünden 1999; Gersch 1975). The same can be said of later attempts to adapt Brecht's plays for the screen. His epic theatre was so particular that even Brecht's own adaptation attempts failed. One memorable example is Brecht's and his collaborators attempt to cinematically portray the stage production *Mouthier Courage* (Mutter Courage und ihre Kinder). The work on the screen play commenced in 1949 with the final version being completed in 1955. It not only took almost six years to agree on the script but as soon as the shooting of the film had started it had already ended – after ten days to be precise³⁹. Brecht had difficulties compromising his specific epic theatre style to that of contemporary films. He wanted *his* actors to star in the movie, he wanted to apply *his* style of stage props, and had hoped to continue experimentation and searching for a best-fit solution like he did in his stage rehearsals (Gersch 1975). Additionally, the effect of the theatre – and even more so in

³⁹ Four years after this disaster, and after Brecht's death in 1956, his former colleagues Palitzsch and Wekwerth made the film a reality (Gersch 1975).

Brecht's case – is created by an immediate contact or interaction between the stage and its audience. A simple cinematic reproduction of such an effect was and is not possible.

Hence, contemporary directors, who base their work on Brecht's ideas – like Lars von Trier for example – bring in their own interpretation of Brecht. The German dramaturge left his mark on past and contemporary film-maker. However their Brechtian approach is not mere adaptation but deserves to be investigated in light of the different available film theories. While their work would make an interesting contribution in the management classroom it is beyond the scope of the present work to discuss those directors' understanding of Brecht and its meaning in the context of *Verfremdung* in management education.

Instead, I will focus on the application of popular film used in light of Brecht's artful use of film as *verfremdung*. While he might not have been a successful moviemaker as he would have liked to be, Brecht's affinity to films remained strong. Inspired by fellow dramatist Erwin Piscator "[h]e introduced a number of far-reaching innovations. One of them was his use of film and of film projections as an integral part of the settings" (Brecht in Willett 2001, p. 77; Martin and Bial 2000; Kerz 1968). As described earlier Brecht incorporated different elements and technological devices like captions, large scale drawings and songs, for example. However, as with everything else in his theatre, these additions were not meant to have an entertaining quality. Instead they served as additional interruptions in order to "... thoroughly muddle up people's idea of the drama" (Brecht in Willett 2001, p. 65). I am not suggesting that film is the only artistic medium that can be used for estrangement but for the management classroom it is an appropriate medium in two ways. First, it is an easy medium to use. Through technological advancement the access to films or film clips is now easier than ever, and as illustrated in Chapter 2 has for some educators become a staple teaching tool for their business courses. This leads to the second point, where I want to suggest that it is exactly this familiarity, which makes film an excellent medium for *Verfremdung*. German philosopher Waldenfels (1990) suggests that the experiences that unsettle and move people are not the particular exotic ones but those where the familiarity of the everyday-familiar is removed.

I have personally experienced a probably unintended film as *verfremdung* during a visit to Poland. One evening I switched on the television and came across a German show. Back then tv shows – I cannot comment on movies – were dubbed by only one speaker. Which means that all characters – male and female – were dubbed by the same voice, in an un-empathetic

way, simply translating the words. Additionally, the original voices were not muted but only faded to the background – so while one could vaguely hear the German words at the same time the Polish speaker layered his unemotional text on top which made it comical. However, while I thought it to be funny and weird, at the same time the actions of the characters felt estranged. Because I found the layered voice-over confusing my attention shifted to the body language and the Gestus. By *refunctioning* existing art-forms and incorporating them in a different way into his theatre Brecht created estrangement. It is in this Brechtian spirit that an altered film clip sought to create *Verfremdung* in a management classroom and in this sense becomes film as *verfremdung*. In the present case then, there is a double-familiarity that can be estranged. First, most if not all students are familiar with popular films. And second, the management classroom can be viewed as the ‘theatre’ that is familiar to students and for which they hold specific expectations.

The creation of new perspectives and the continuous ability to shift them once they become flawed or outdated is the main objective of Mezirow’s transformative learning theory, as discussed in Chapter 1. Suggesting that real thinking and learning take place when the educational process is interrupted in one form or another (Hedberg cited by Barrett 1998; Louis & Sutton 1991; Piaget 1977), *Verfremdung* can add a heretofore neglected function to the use of films, by taking advantage of its inherent capacity for contradiction. *Verfremdung*’s objective of making the familiar unfamiliar creates an opposition between habit and the expected, which leads into the process of deep learning. Or in Schütz’s words:

If we encounter in our experience something previously unknown and which therefore stands out of the ordinary order of our knowledge, we begin a process of inquiry (Schütz 1964, p. 105, cited by Louis & Sutton 1991, p. 59).

This need for the unknown resonates with Bertolt Brecht’s concept of *Verfremdung*, which turns the familiar into something unfamiliar. The traditional use of film banks on its mediums’ familiarity to teach frameworks and concepts in a simplified manner, to make material more accessible. Brecht’s *Verfremdung* on the other hand, strives for complexity, which he describes as follows:

The achievement of the A-effect constitutes something utterly ordinary, recurrent; it is just a widely-practised way of drawing one’s own or someone else’s attention to a thing, and it can be seen in education as also in business conferences of one sort or another. The A-effect consists in turning the object of which one is to be made aware, to which one’s attention is to be drawn, from

something ordinary, familiar, immediately accessible, into something peculiar, striking and unexpected. What is obvious is in a certain sense made incomprehensible (Brecht in Willett 2001, p. 143).

Additionally to the familiarity with the management classroom setting, students are generally familiar with films and their traditional use for pedagogical purposes. As described earlier, film as illustration and film as thesis have become common teaching tools, and are frequently used to create stronger student engagement with a specific management theory. The tool-like character is for example illustrated by Billsberry's and Leonard's (forthcoming 2012) handbook on how academics and teachers can teach particular subjects with films, and which practical issues such as copyright and technology need to be taken into consideration. It is only natural that the repeated application of a certain method has a canonization effect. The use of films in the management classroom is as familiar to students as the contemporary theatre was to audiences in Brecht's time. German philosopher Waldenfels (1990; 1997) emphasized that the estrangement of the common, every-day known has an unsettling effect because something can only appear strange in the context of the familiar. For him it is not that something strange becomes experienced but instead that something is experienced as strange and hence heightens the attention.

Therefore, film as *verfremdung* can only be experienced by a deviation from the common, familiar use of film. *Verfremdung* provides the necessary strangeness to initiate such a 'process of inquiry'. Chapter 1 has established the view that management/executive students should be exposed to strangeness because they lack sufficient opportunities to question their knowledge. But they are also often complacent with their existing level of comprehension and their habituated thoughts because hierarchical structures of organizations often hinder the questioning of management actions and decisions and don't challenge them to revisit their underlying assumptions. Traditional business school curricula usually concentrate on teaching tools and praxis, which can be applied to predefined situations, instead of attending to the development of skills that are less tangible and might not produce immediate outcomes. Judging by the ongoing debate about this limitation of management education, it seems reasonable to suggest that *Verfremdung* can provide the external conditions required for 'thinking'. Hjorth (2011) suggests the necessity to "uproot people from the limits of their present experiences" (p. 58), and film as *verfremdung* seeks to respond to this challenge by unsettling existing knowledge and facts. This artful contradiction means to highlight that the

world is not natural and fixed, and that the changeability of humans and their reality are a genuine possibility.

But film as *verfremdung* can further be distinguished from film as illustration and thesis by its anticipated capacity to not only interrupt habitual thinking but to also provide students with space to critically reflect and change their perspective if they deem it necessary. The earlier discussion on art has focussed on art's ability to allow learners to imagine and consider previously unimagined possibilities. When films, or other art forms for that matter, are used as illustration of essence they communicate established views, which while valuable for learning skills that focus on functionality, restrict imagination. As mentioned in Chapter 1, Winner et al. (2006) found that arts-based teaching does not lead to a skill increase on a functional level but instead develops, amongst others, proficiency in envisioning. Film as *verfremdung* creates a knowledge gap. With this I mean that by being confronted with something strange, something that hasn't occurred before in an educational setting, film as *verfremdung* contradicts what students have come to expect in a classroom. It contradicts existing perspectives but because it doesn't use a preset perspective to bridge this knowledge gap, at the same time it offers learners the opportunity to fill this void with creative and innovative possibilities. Robertson (2006) suggests that when education acts as such a form of provocation "[i]ts effects may be radical and socially transformative, awakening consciousness in the form of insight" (p. 179). If films are used as mere illustrations for organizational reality there is a high possibility that the state of consciousness remains unchanged.

Propositional Characteristics of Film as *Verfremdung*

To allow a comparison between the three film approaches, I have extended Huczynski's and Buchanan's table (2006, p. 82) presented earlier. This format gives an overview of the different objectives that the three film approaches pursue. It highlights the decline of concreteness in terms of the provided knowledge. Whereas film as illustration is at the science-like end of the spectrum and gives perspective, film as thesis covers the narrative middle-ground that builds perspective, which is followed by my extension of film as *verfremdung*, which fosters critical reflection and transforms perspective. The latter is anticipated to possess the ability to support not only intellectual growth pertaining to praxis but also to lead to insights and perspective changes that go beyond functionality (see Table 4).

| Film as Verfremdung | |
|-----------------------|---|
| De-reification | <p>Contradicting and unsettling current level of understanding/knowledge.</p> <p>Opening space to envisage previously unconsidered possibilities.</p> <p>Creating complexity instead of simplifying existing knowledge.</p> |
| Reflective Engagement | <p>Leading to critical/deep reflection.</p> <p>Realizing the importance of different perspectives.</p> <p>Creating space for perspective transformation.</p> |

Table 4. Characteristics of film as verfremdung

As mentioned throughout this thesis, Brecht's V-Effekt and Verfremdung in general were not established with an MBA classroom in mind, yet its objective is of an educational nature. It wants to emancipate the percipient from established perspectives and urges him to wonder, to look again and to find a sense-making explanation from within. The characteristics of de-reification and reflective engagement are based on Brecht's writings on Verfremdung. While it is probable that additional elements can be found within Verfremdung, these two stood out after the investigation of the qualitative material of this study.

De-Reification

As discussed in Chapter 1, Brecht created his theatre and his idea of Verfremdung in opposition to Aristotle's drama where the protagonist suffered from an inevitable fate and was not able to seek alternative outcomes. In a philosophical sense, the acceptance of fate and destiny as if they were an objective and unalterable condition can be viewed as a form of reification. The German word for reification – *Verdinglichung* – has the literal meaning of 'thingification' or in a more refined way, 'to make (something abstract) more real or concrete' (Compact Oxford English Dictionary). Or in other words, 'to regard or treat (an abstraction) as if it had concrete or material existence' (American Heritage Dictionary of the English Language). While Georg Lukács was the first to introduce the actual term reification in his essay *Reification and the Consciousness of the Proletariat* (Fenichel Pitkin 1987), some of the most sophisticated contemporary critics of reification (Berger & Luckmann 1967; Berger & Pullberg 1965) attempted to clarify the use of the concept in the following way:

By reification we mean the moment in the process of alienation in which the characteristic of thing-hood becomes the standard of objective reality (p. 200).

Alienation is “the process by which the unity of the producing and the product is broken” (p. 200), which means it is regarded as an intellectual and social process of ‘forgetting’ or ‘repressing’ the fact that man is the maker of his world. Alienation thus produces alien facticities, which become naturalized and part of a reified consciousness. Throughout history there have been numerous examples of those with a vested interest in influencing and controlling actions and thoughts, and who have imparted ontological status on man-made conventions. For example, most religions have and do deliberately invoke a higher power, which has to be obeyed or else there is punishment and suffering to come. Marx saw capitalism and the fetishism of commodities as a source of alienation in that it made people forget that they should not be defined by their work power and reduced to labour output. Where radical political systems have oppressed their countrymen with threats and violence for long enough, it has the effect that the population fails to remember that there are alternatives. And while I don’t want to suggest that traditional business school curricula oppress their students, I do mean to say that its form has been accepted as natural, as something reified, that negatively restricts knowledge creation.

Berger and Luckmann (1967) see reification as a reoccurring process that is natural to the construction of reality. Man produces a certain expression, which is accepted and used by society, which leads to the product becoming alienated from its producer and turning into a fixed objectivity, which means that it has undergone the process of thingification. To give an example of this process one only needs to look at the simple gesture of a handshake as a way of greeting another person. It is so universal in Western society that it is only recognized as a socially created gesture when one visits a country like Japan where a handshake is uncommon and the appropriate way of greeting is by bowing. This small cultural example can be transferred to the bigger scheme of society and education. Because of the way reification affects consciousness it remains mostly unnoticed until a kind of interruption occurs. Berger and Pullberg (1965) outline a number of conditions that might rupture such *de facto* situations. They emphasize, in particular, natural or man-made catastrophes that shake the foundations of taken-for-granted, creating doubt and scepticism, for example the ‘rationality’ of the finance markets by the ‘global financial crisis’; culture contact and ‘culture shock’ – namely war, trade, migration, urban life; and living in conditions of social marginality – which could be of ethnic, religious, moral or political nature. While Berger and Pullberg address reification on the macro level, I suggest that based on Brecht’s objectives for *Verfremdung*, film as *verfremdung* has the ability to create a *rupture* on an individual level. Some of Brecht’s

V-Effekts were deliberately employed to demonstrate that humans have choices to act one way or another, and that a given situation does have to be final. In the pedagogical context this means that film as *verfremdung* points out to students what they have come to expect and also frees them to cognitively engage with the material on their own terms.

Reflective Engagement

The second characteristic, namely reflective engagement, is thought to occur once students' didactic experience has been interrupted. On its most elementary level, learners engage in reflection when they solve problems – opposed to carrying out everyday tasks that can be accomplished with routine-based thinking and action. This process of reflection is marked by a focus on the external problem that needs to be solved. This kind of reflection occurs commonly in management education when students for example, learn a new marketing strategy to reach different consumers.

Critical reflection on the other hand has a two-way focus. It not only addresses the problem at hand but also directs the gaze at an individual's assumptions and beliefs. To stay with the above marketing example, if the learner engaged in critical reflection he would not only learn the new strategy but also question his assumptions about marketing and consumers. Critical reflection is a crucial factor for perspective transformation, which Mezirow (1991) sees the primary objective of adult education. While not all critical reflection results in perspective transformation, perspective transformation is not possible without critical reflection.

Verfremdung, as described in Chapter 1 has the primary task of making the familiar appear unfamiliar, or in other words it interrupts mechanistic causality by challenging everyday assumptions. This interruption creates an empty space, which frees students from existing perspectives – be it their own or that of their field of management expertise. This void constitutes a knowledge gap that requires action from the learner because habituated thinking patterns don't apply in this unfamiliar territory. I see this knowledge gap like a rift in the path of a mountain hiker. The hiker walks, enjoys the scenery, which is beautiful but not unexpected, and is suddenly stopped in his tracks by a canyon. Figure 2 demonstrates how I imagine this analogy to film as *verfremdung*:

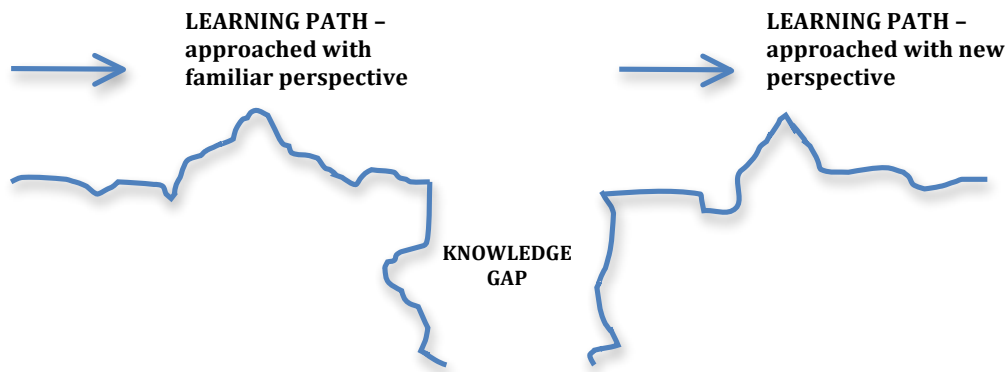


Figure 2. *Film as verfremdung* creates a knowledge gap

In order to continue the hiker will need to find a solution. First, he could take another path and thus ignore the gap. Second, he could build a bridge to get to the other side and continue his hike. Third, he could fill this gap with whatever material he can find and thus prepare the way for his return. *Verfremdung* puts the learner in a similar position. The unsuspecting MBA student walks through the course, enjoying the scenery of expected informational learning, and is taken by surprise by the gap that film as *verfremdung* constitutes in his learning path. Depending on his ability and predispositions, the learner decides for one of the solutions from the hiking analogy. If the learner decides to dismiss film as *verfremdung* as a nuisance, he will avoid the gap by taking another route. The bridge building learners are not too fazed by film as *verfremdung*. The learning-hiker that decides to fill this gap will have to work harder but emerges at the other side with a changed perspective. In the moment of working and sweating he will temporarily forget about his hike, and the scenery that he has become so used to. He might be annoyed and even wonder why he is putting himself through such an ordeal, but also might find a new appreciation of rocks, and other material that helps him to fill the gap. Once he has managed to overcome this obstacle it is likely that his hike will be different from before.

To return to the pedagogical language, the student who is willing to confront his knowledge gap is anticipated to engage in critical/deep reflection and to investigate their underlying assumptions. Because film as *verfremdung* appears strange it highlights the existence and importance of different perspectives. Critical reflection can act as a magnifying glass to help the learner for example, detect his reasons for learning and his underlying assumptions that they bring to their management lives. But while *Verfremdung* provides learners with the space to experience perspective transformation its objective is not pre-determined.

Chapter Summary

This chapter set out to explore the general rationale for the pedagogical use of films with a literature review on the use of films from a range of disciplines like Sociology, Psychology, and Organization and Management Studies. These, mostly idiosyncratic, examples have highlighted that visual representations not only capitalize on humans' inherent ability for picture-based sense-making, but that they can also provide arts-based spaces for knowledge that extends scientific and technical approaches to education. Having established those general visual and cinematic ground rules, the chapter turned its focus to the two main film-based teaching approaches in management education. Film as illustration and film as thesis constitute structured film-based approaches with an established body of literature. Explicating their rationale, and valuable contribution to management education, namely providing and guiding students' perspectives, they were helpful stepping-stones for my extension of film as *verfremdung*.

This chapter then continued with an exploration of the possibility of integrating film in a way that acts as a trigger event for transformational learning, as discussed in Chapter 1. I have suggested that *Verfremdung* with its capacity to interrupt habitual thinking opens up space for learners to reconsider their knowledge and fill the gap between the known and untested knowledge with creative and innovative possibilities. The following chapter will discuss the empirical considerations pertaining to the inclusion of film as *verfremdung* in an MBA-level change management course.

3. Methodology

Traditional management education needs to adjust its science-centric curricula, which is often guided by habitual thinking and acting and marked by a focus on informational learning – this much has been established in the preceding chapters. In order to open up space for the inclusion of other forms of knowing and knowledge it needs to allow its curricula to break away from a focus on frameworks and functionality. The arts in general and film as its particular pose a viable extension to science. Chapter 2 has established that the existing film approaches are targeting informational learning. Film as *verfremdung* on the other hand is based on Brecht's assumptions of *Verfremdung* – which coincide with some of Mezirow's objectives of transformational learning – to promote critical insight, which is crucial for surfacing underlying assumptions. The purpose of this case study is to investigate the implications of the inclusion of *Verfremdung* in management education. To do so, data from an MBA-level change management course at an Australian business school was collected and analyzed.

Case Selection

Being a PhD candidate at the Macquarie University Graduate School of Management (MGSM) led to the selection of the case. MGSM offers MBA programs as well as non-degree Executive Education, and provided a fitting environment for the empirical study of *Verfremdung*, namely a traditional business school setting. MGSM has a high profile in Australia and its MBA program was ranked among Australasia's top five (The Economist – Which MBA? – 2010). MBA students require at least five years of relevant work experience, and the average management experience is seven years, with ca. 50% of students being middle managers. 62% of students are in the age range of 25-35 years and men represent 60% of students while 40% of all students are female. Course units cover the whole spectrum of business education, like Financial Management and Organisational Behavior, and the case selection process was guided by several considerations. First, it had to be a course module where film and video elements were already used or could easily be incorporated as a teaching aid. The second and more important decision factor was that the lecturer needed to agree to have their course interrupted by *Verfremdung* and risk potential alienation as a result. This was not only an

important factor from an ethical point of view but also pertained to reputation because lecturers at MGSM get evaluated by students and ranked within the school accordingly.

As discussed in Chapter 2 film as *verfremdung* is a risky business in an educational context. The course lecturer who is one of this thesis' PhD supervisors agreed with the concept of *Verfremdung* as an external stimulus and its potential benefits, and was willing to lend his Managing Change course, MGSM866⁴⁰ as a case study. Furthermore, the lecturer has been using virtual and filmic material in previous Managing Change deliveries, and the integration of film as *verfremdung* was not an unreasonable burden to add to his course. Data was collected from two different courses in 2010. All participants were enrolled in Macquarie's MBA program of which this course is an elective subject. The average age of the MBA students is 28 years for full-time and 33 years for part-time students. All MBA students have several years of work experience and none of the students has transitioned into the MBA with only an undergraduate degree.

Course Description

The general structure of the course is that it is divided into two weekend blocks of which the first one runs over three days and the second weekend takes up two days. While film, video and interactive material are used throughout the course film as *verfremdung* was included in the second weekend. The placement of *Verfremdung* in the second half of the course had the added benefit that the students were already familiar with each other and the initial awkwardness that is often present when new groups/teams form had passed.

The following details of the course are based on the lecturer's description of the course, the course outline, and my observation from attending the second weekend. Change management is often seen as a management framework that requires tools and instruments that can be acquired and applied in a standardized way. What students tend to neglect, and what they are mostly not taught about are the emotions and politics involved in any change intervention. The course content and structure is tailored to convey the message that change will always be messy and that the students need to learn to manage their emotions as well as their client ones. The course is structured around the lecturer's change framework of the 5Ms:

⁴⁰ The course outline is attached as Appendix 2.

1. The Challenge of Change: **M**indful and Mobilising Change
2. Experiencing Change: Mindful and **M**obilising Change
3. Planning the Change Journey: **M**apping Change
4. Leading Change: **M**asks and Performing Change
5. Learning to Change: **M**irrors of Change

The course outline suggests the following pre-readings for participants:

Buchanan, D. and Badham, R., 2008, *Power, Politics and Organizational Change: Winning the Turf Game*, Sage, London;

Beer, M. and Nohria, N. (ed.), 2000, *Breaking the Code of Change*, Harvard Business Press, Boston;

Experience Change readings from the Experience Point website⁴¹ of the virtual change case simulation; and

a course reader that includes seminal articles; case studies; methods and techniques; and exercises.

The first day was the most confronting day for students because the majority of them arrived with preset expectations pertaining to what they wanted to learn about change management. The lecturer used a different format in the sense that first, students were greeted by Doris' Day song *Que Sera, Sera* and second, the extensive use of short video clips that act as exclamation marks for various change issues. Furthermore on Day 1, the lecturer deliberately repeated the message that the majority of change projects fail. Jamie Oliver's documentary *Jamie's School Dinners* was introduced as a change management study on Day 1 – the complete show is watched subsequently during the five days of the course. The lecturer described Jamie Oliver' show as:

[an] inspirational' story that permeates the whole course, and which is used not just as an illustrative case, but something that 'gets their emotions going', and also serves as a basis for a reflective discussion of the case itself and how everyone interprets it.

The second day was an internet-based or virtual case study. The simulation, namely GlobalTech, is provided by the company Experience Point and allows students to work

⁴¹ <http://www.experiencepoint.com/sims/ExperienceChange>

through a real-life scenario of a change project. It provided participants with a model of change, giving them an opportunity to think through and apply change management techniques. Students were randomly organized into groups and the lecturer added that the simulation also contributed to the group dynamic experience.

The third day was mainly focused on the management techniques of gap, forcefield and route analysis. Student groups analyzed Jamie Oliver's documentary with this planning techniques. However, the lecturer reframed these methods as mapping techniques that are not rigid but provide guidance for change projects.

Day 4 is based on the Mask and Performance element of the 5M framework. In the words of the lecturer it provides "a critique of narrow 'rationality' and narrow views of 'management', arguing for a more 'reasonable' approach and one based on ideals of 'leadership'". *Verfremdung* was integrated in this particular day, and will be described in more detail at a later stage of this chapter. Day 4 also included a role-play where student groups were asked to perform either a motivational or de-motivational speech – students could chose their topic and were given two hours to prepare the presentation.

The fifth and final day of the course was based on the Mirror element of the 5M framework and the lecturer used it to reinforce the message that change projects not only require skills but also knowledge that is less tangible. The need for reflection on and the "intellectual components" of change projects were particularly highlighted at this day.

Overall Vibe in the Classroom

On Day 1 students arrived with expectations for the change management course and the majority got frustrated and anxious by what the lecturer describes as the "lack of detailed precision in what they have to do for their assignments, and also in the rather loose way in which the course is presented, and the statement that they will not be given a 'method' rather worries them". However, each of the two courses contained a small number of students who appeared unfazed, but excited.

Because Day 2 was structured around a case study, namely the Experience Point simulation students felt more at ease with the course. The majority of students enjoyed the simulation because the simulation provided them with a praxis-relevant tool, with which they could practice their analytical skills.

At Day 3 the groups had settled in, and because they could practice the above-mentioned analysis tools, students were noticeably relieved to have at last received techniques.

From my observation and the lecturer's perception of the fourth day, the energy amongst the students was mostly lively around the role-plays. A large majority were covering the embarrassment of giving a public performance with a lot of humour and joking. However, some students exhibited a reserved behaviour and were doubting the usefulness of role-plays. Participants responded to film as *verfremdung* in a less excited manner, and didn't exhibit a particularly noticeable behaviour.

In the words of the lecturer Day 5 was:

quite relaxed and reflective, with some finding it a very useful end to the course, as it focuses on creating effective learning spaces, while some others might find it again a 'bit loose'. Gradually during the course more people come up expressing their understandings and concerns about the assignments, but getting gradually more comfortable, such that by the end of Day 5, they are happier.

Empirical Rationale of Film as *Verfremdung*

As described earlier, *Verfremdung* was integrated into the artform of films, which I have coined film as *verfremdung*. While Chapter 2 has explicated the theoretical dimensions of film as *verfremdung*, the following paragraphs establish the empirical rationale for the choice of the particular movie.

Bertolt Brecht once suggested the development of a 'smokers theatre' as an aid of detachment:

where the audience would puff away at its cigars as if watching a boxing match, and would develop a more detached and critical outlook than was possible in the ordinary German theatre, where smoking was not allowed (Willett 2001, p. 8).

Because a man who is in the process of smoking a cigar is "... pretty well occupied with himself ..." (Brecht in Willett 2001, p. 44) and hence would be less likely to get carried away. Getting carried away in the sense of empathy was for Brecht the worst that could happen to an audience because it would keep it from questioning the action and simply accepting what they were. While the smoking theatre never happened, Brecht instead sought cognitive estrangement through technical finesse that would change the conventionally accepted forms of dramatic presentation, and trigger some form of reflection. *Verfremdung*, as an

artistic element is mostly aimed at changing people's views, perceptions, and perspectives. It aims to work against unnecessary routines and habitual ways of acting and thinking, and to generally rejuvenate people's perceptions of possibilities and alternatives.

MGSM866 – Change Management contained numerous film clips. However, during the inspection of the material one particular clip stood out as representing a suitable platform for a Brechtian form of *Verfremdung*. The lecturer used a scene from the movie *Braveheart* (1995), which will be briefly described below.

The scene depicts the *Battle of Stirling*, which is part of the historical Scottish fight for freedom and independence. On the battlefield the English army outnumbers the Scottish men by far, and the Scotsmen who are additionally under-armoured are prepared to negotiate an allegiance because a fight seems impossible to win. The main character, William Wallace⁴², a Scottish commoner who rebels against the English, rides late onto the battlefield, has his face painted in the Scottish colours of blue and white, and exudes humble strength by acknowledging to not fit his larger-than-life public personality image in a humorous way. Wallace addresses his fellow Scotsmen with an emotional speech⁴³ that paints a bleak picture of their future and appeals to their pride by suggesting that a life without freedom would be shameful and regretful.

In past course deliveries this particular scene has been used to illustrate how leadership is essentially a performance that needs to be executed well in order for it to be effective. Leadership as performance is a message that applies to the private personal lives as well as to organisational or work lives, suggesting that everyone has to play multiple roles, which involve juggling numerous responsibilities. In organizations, employees are given formal roles and responsibilities, and are additionally subjected to informal expectations. In order to effectively fulfil, bundle together and improve how to undertake these roles, there needs to be a degree of effective distance from them. The idea of seeing these as parts that have to be played, masks that can be put on and taken off, can help in this regard. *Braveheart's* speech is a convincing leadership performance and has a high potential for communicating the different roles people play.

Being a so called Hollywood Blockbuster, it was anticipated that most students would be familiar with *Braveheart*, providing in a Brechtian sense the necessary condition of familiarity

⁴² The film's main character is portrayed by actor Mel Gibson.

⁴³ The transcript of the speech is attached as Appendix 3.

to turn it into something unfamiliar. Additionally the original, unaltered clip was made available in the course curricula and is freely accessible on YouTube. This particular ‘battle scene’ is dramatic and emotionally charged, and carries a high risk of eliciting a too emotional response from the viewer. As reiterated throughout this thesis, empathy was the part that Brecht tried to avoid because it can move the focus from the message, in our case of leadership as performance, to how it makes the audience feel. The latter would be expected to be the intention of the film producers who apply complex scripting and staging, and dramatic musical scores to create an emotional experience. Hence without some form of *Verfremdung*, the clip carries a high risk of appealing too much to the student-viewers emotions.

Waldenfels (1990) suggests that challenges, while most often uncomfortable, are necessary to avoid becoming complacent with the status quo and to grow. From a didactic perspective discomfort is a pre-requisite for static learning that goes beyond acquiring information. As mentioned earlier the MGSM866 set-up deviates from other MBA classes to a certain extent and thus possesses a basic, inherent strangeness. It uses film, video and interactive material throughout the five days which provides the context for film as *verfremdung*. The course design is comparable to how Brecht set the scene for his epic theatre. As described in Chapter 1, Brecht used an ensemble of art-forms, technical elements, and special acting technique to create *Verfremdung*. In a similar vein, the present change management course equally contains various teaching elements that set the scene for strangeness. Goodman (1978) suggests that the arts, which are incorporated in MGSM866 in numerous ways, enlarge knowledge. By rearranging the classroom space, a particular course design can contribute to breaking down the dramaturgical fourth wall, which keeps up the illusionary separation between on the one hand students (audience) and lecturer (actor), and different forms of knowing on the other. The different set-up of the course at hand plays an important part in disabusing students of their expectations pertaining to how and what to learn. It requires an altered mode of thinking and knowing. When the scene – which is in a pedagogical context the learning environment and the course design – is not set appropriately, film as *verfremdung* contains the risk of appearing as a glitch, an oddity that has no particular purpose. However, because the complementary teaching ensemble is complex it heightens students’ awareness and can interrupt their habitual responses.

Since songs and videos are present from day one of the course, students remain in a state of heightened awareness without being thrown by it. This stands in comparison to Brecht's epic theatre. His audience gradually got used to, for example the lack of props and to the different way that songs were presented. The spectators did not constantly feel estranged but were unsettled by moments, scenes of increased strangeness. For the present case this kind of interplay of different course and teaching elements means that students lower their guards to strangeness, or in other words a certain degree of familiarity can set in. It is in this specific context that the estranged video clip is not perceived as an anomaly in an otherwise straight forward business school course but as an unexpected increase in strangeness, or in other words as *Verfremdung*. While students of humanities would consider such strangeness less an 'aha' moment, most business students will find this a distraction to the learning outcome (Colby et al 2011) – or in business speak they don't see the return of investment in such a different teaching intervention.

In the sense of transformational learning the deviating or estranged course design ensemble contributes to the first step of this learning process which is the generation of consciousness. Transformative learning 'requires discomfort prior to discovery' (Taylor 2008), and for the majority of business students film as *verfremdung* creates the discomfort that is necessary for deep learning and reflection. This kind of learning is not so much a cognitive process that is led by reasoning and logic but more a provocation that drives learner on an emotional level. Vince (1998) for example suggests that "fears, anxieties, and doubts are very common emotional experiences in processes of learning and change " (p. 310).

The underlying assumption for the present case study was that students are generally open to learning and experiences. However, Vince and Martin (1993) remodelled Kolb's learning cycle to highlight the emotions that promote or prevent learning, thereby illustrating that assumptions of openness can be overly optimistic. When the learning environment creates anxiety learners react differently to such an external threat. Vince (1993), and Vince and Martin (1998) illustrate that when anxiety promotes uncertainty and risk taking within a learner it can create insight. But when it stimulates a 'flight or fight' reaction the learner goes into denial, new knowledge is turned down, and the learning experience is blocked. Or in other words, those who are able to hold the anxiety are in a stronger emotional position to scrutinize their meaning schemes and perspectives, and turn to reflection to gain deeper insights.

Critical reflection is unstructured learning in the sense that it is not linearly directed at a specific problem but takes numerous aspects of experiencing, politics, feeling, and being into account. The traditional business school learning environment is pervaded with structure, outcome focus and functionality. By providing an unstructured learning environment through an ensemble of teaching aids like video clips, music, and a comparably less stringent agenda, MGSM866 paves the way for initiating reflection and transformational learning through *Verfremdung*.

The *Verfremdung* sought for the Braveheart film clip attempted to alter the way the speech would be received. The words of the speech and the imagery were kept but the familiarity was taken away by replacing the characters. William Wallace's voice was replaced with a female voice-over that was timed to correctly dub the words while the dramatic background music was kept. The resulting estrangement was twofold. Firstly, the female voice naturally did not match the male character, and secondly the voice-over was done without the pathos and conviction of the original speech. The second technique of estrangement was to run the scene silent, without words and music, which Driver (2003b) suggests as an additional opportunity for "... critical observation, reflection and distance" (p. 2). This integration of *Verfremdung* resonates with Brecht in that his idea of *Verfremdung* was a factor of surprise where contradictory elements not only co-existed but were particularly used to produce something unexpected within the expected (Wright 1989).

During the same day of the course, students received the task of doing a role-play as a practical experience of the differences between motivational and de-motivational speeches in a leadership context. As described earlier the topic selection lay with the students.

Prologue to Data Collection

This thesis experienced the near collapse of the case study because of a severe epistemological mistake. I include this mistake not only because it provides a more truthful account of the research but also because it was a personal learning experience for me. This study set out to discover if and how Brecht's *Verfremdung* could contribute to the field of management education. It was based on my belief that the arts are an invitation for complex seeing that releases learners from pre-defined perspectives. Yet, as my research progressed, *Verfremdung* was more perceived as an instrumental teaching tool and the language changed from exploring to testing. My local supervisor and I started talking about the

operationalization of *Verfremdung* as if it was an object. The testing became the main focus and the exploratory nature of this investigation was pushed to the back. Short questionnaires were constructed in order to test a propositional concept of characteristics of *Verfremdung*. Reflecting back on this experience I believe that it was the comfort, which tried and tested quantitative methods often insinuate that made me turn to quantitative measures. Qualitative research is complex and as a novice researcher this task can be daunting. After the analysis of questionnaires from the first course did not produce results the continuation of the thesis project was questioned. It became clear that quantitative research methods proved to be inadequate. However, while no statistically relevant results were achieved with the questionnaires it became clear that *Verfremdung* is a slippery and ambiguous concept that doesn't lend itself to be expressed in numbers and needed to be explored differently.

The collapse of the quantitative data collection and its challenging consequences were the trigger event that helped recover the thought that *Verfremdung* doesn't express itself in linear causality. The initial failure clarified that this case study would not be able to explore *Verfremdung* as a steady concept but it would suggest one of numerous applications to *Verfremdung*. It became clear that the concept of *Verfremdung* eludes instrumentalization – either as a teaching tool or measuring it in an instrumental, quantitative way. The realization of the epistemological inadequacy further highlighted that *Verfremdung* is *experienced* by the learner and depends on his predispositions that are often unknown by the educator. Finally, the event led to the insight that *Verfremdung* can be assessed only within the context of participants' background and expectations. Thus any quantitative measure, even if it produces statistically significant results, is removed from the experience of the learner. This unsettling process also highlighted to me how important critical reflection is. While I was writing about critical reflection my own reflexivity had critically diminished. For future research I will need to reassess my assumptions throughout a project. In order to highlight the epistemological flaws the following paragraphs will describe the data collection and analysis as it was initially planned.

Data Collection and Analysis

The exploratory nature of the present study contributed to the decision for multiple sources of evidence in a mixed method design. While the purists suggest that quantitative and qualitative methods are attached to certain paradigms, for example positivism and

constructivism and therefore should not and cannot be mixed, there is a growing number of scholars suggesting a more pragmatic approach to research (Bryman 2009; 2006; Plano Clark et al 2008; Yin 2003; Tashakkori & Teddlie 1998; Howe 1988; Rossman & Wilson 1985). According to the position, which supports mixed methods the applicability of different methods depends on the research question, the unit of analysis, and also the researchers skills.

Separating the method from the question and attaching it to a certain paradigm results in an unproductive, and artificial rift. Different methods extract different information and enable the researcher to collect separate elements of an answer, for there is seldom a straightforward, tell-all answer. This is particularly true for the present research, which aims at understanding what we can learn about *Verfremdung* in general and the use of film when we add *Verfremdung* in particular, and what taken for granted assumptions start to shift. This general principle of the suitability of mixed methods has been further refined, and in an effort to establish a framework of rationales Greene et al (1989, p. 259) have identified five main purposes, which are:

Triangulation: seeks convergence, corroboration, correspondence of results from the different methods.

Complementarity: seeks elaboration, enhancement, illustration, clarification of the results from one method with the results from the other method.

Development: seeks to use the results from one method to help develop or inform the other method, where development is broadly construed to include sampling and implementation, as well as measurement decisions.

Initiation: seeks the discovery of paradox and contradiction, new perspectives of frameworks, the recasting of questions or results from one method with questions or results from the other method.

Expansion: seeks to extend the breadth and range of inquiry by using different methods for different inquiry components.

Using the above framework as a guideline, the reason for applying different methods to the present research can mainly be found in complementarity. Because of the complexity of an empirical investigation of *Verfremdung* it seemed appropriate to gather multiple perspectives

und achieve different levels of understanding through a range of methods (Plano Clark et al 2008). The quantitative part of the design was non-experimental because the research setting was the natural environment of the course delivery. It also contained multiple extraneous variables like group dynamics, students' perception of the subject, and lecturer influence on students. These variables were fluid and could not be controlled. Furthermore, the research was designed in a sequential manner, or in other words a two-phase study where the quantitative stage was conducted first, followed by a qualitative phase of participant observation. The participant observation was scheduled to complement the questionnaire results and formed the initial qualitative material.

The research was initially designed to consist of a control group, which means that it was planned to separate the class on the specific day and to not expose all students to the teaching intervention. However, this design had to be amended to one without a control group for several reasons. First, the number of students for each class already constituted a relatively small sample size and further reduction would have negatively impacted the statistical informative value. Second, a control group would have required the separation of the class, which was undesirable from the lecturers' perspective because it would have meant to provide one half of the students with an alternative class schedule.

Initial Operationalization of *Verfremdung*

Empirical literature on the concept of *Verfremdung* is scarce and is mostly generated by German educators. However, no literature was found on *Verfremdung* in the context of university or adult education. As discussed in Chapter 1, Brecht developed his concept of *Verfremdung* in order to promote critical insight. A close analysis of his theoretical writings suggested that *Verfremdung* had two main characteristics: de-reification and self-efficacy. These provided the basis for the initial *operationalization* of *Verfremdung*:

De-Reification

Because de-reification has already been explicated in Chapter 2, I will only provide a short summary at this point:

The German word for reification, *Verdinglichung*, has the literal meaning of thingification. It describes the process that occurs when *something* is objectified, or in other words when knowledge, or circumstances are taken as natural and unchangeable. De-reification then,

means the reversal of this process. Because of the way reification affects consciousness it remains mostly unnoticed until a kind of interruption occurs – as it was the case with my research experience. In Brecht's words de-reification takes place when something – in his case *Verfremdung* – interrupts mechanical causality.

Self-Efficacy

Self-efficacy as the third element of *Verfremdung* has received ample research attention both from a psychological and sociological perspective (Bandura 1997; 1995; 1982; Gist & Mitchell 1992; Gecas 1991; 1989). Self-efficacy refers to "...people's assessment of their effectiveness, competence and causal agency" (Gecas 1989, p. 292) and takes their motivation and cognitive resources into account. While Brecht did not take the cognitive resources of his audience into account, he clearly sought to motivate spectators to become aware of circumstances and attempt to change these. He based his writings on *Verfremdung* on an emancipatory view of education, and expected that once his theatre had enabled the process of de-reification audiences would be well-equipped to address changes.

Returning to Bandura's words, self-efficacy relates to people's beliefs about what they can do. As a result, individuals will act on their beliefs about what they are capable of achieving, as well as their beliefs about the likely outcomes of successful performance. While *Verfremdung* is the external trigger for de-reification, self-efficacy has a stronger human agency focus. Self-efficacy beliefs are built through "... performance experience, vicarious experience, imaginal experience, verbal persuasion, and affective and physiological states" (Maddux & Gosselin 2003, p. 223).

Quantitative Data Collection and Analysis

Quantitative Data Collection

While the later emphasis lay on the qualitative material, an initial quantitative stage was carried out to test the above-described a priori concept of *Verfremdung* with a questionnaire⁴⁴. The questionnaire was designed as a traditional, non-experimental pre-post-test method, which was used to test for a possible increase in de-reification, and self-efficacy.

⁴⁴ The questionnaire is attached as Appendix 4

The final quantitative data set used for the analyses was based on 25 participants from the first course delivery in 2010.

The dependant variables were changes in self-efficacy and de-reification between T1 (pre-intervention measurement) and T2 (post-intervention measurement). The delivery of the change management course was split over two weekends. On the first day of the second weekend, participants were asked to complete the first questionnaire (T1). On the second day, the participants first attended the intervention exercise and then completed the second questionnaire (T2). Both questionnaires contained a self-efficacy scale (Bandura 2006) and the de-reification scale. The de-reification dimensions were based on the course content and elements that the lecturer believed to be reified Change Management concepts or in other words established views on Change Management. Since the quantitative data was considerably narrow its analyses was limited to Cronbach's α and t-test, and the results will be presented in the following chapter.

Following the recommendations of Bandura (2006; 1997; 1982), self-efficacy was measured task-specific, which means in relation to the competency or skill to undertake the task at hand using the 100-point Grid system. Students were asked to indicate their level of self-efficacy, that is their confidence in conducting a specific task, at 6 performance levels, which vary in difficulty on a scale of 0 to 100, in multiples of 10. A score of 0 indicates a complete lack of confidence – cannot do at all – whereas the highest possible level of 100 signifies a high level of confidence – highly certain can do. The scale does not include negative numbers because a complete lack of confidence to perform a certain task, which is indicated by a score of 0, does not have a declining progression.

While 5-point and 7-point Likert interval scales have been used in past research (Spreitzer 1995; Chowdhury 1993; Jones 1986), Bandura (2006) suggests that smaller scales are less sensitive and offer less reliability because they unnecessarily limit participants' response options. In order to further minimize the effect that scale restrictions impose on the responses of participants – respondents tend to rate themselves highly self-efficacious at normal performance levels – Bandura (1997) recommends to measure the concept in 6 performance levels with increasing difficulty and to drop the first and last level during analysis.

Quantitative Data Analysis

Based on the non-experimental pre-post-test design the quantitative data was analyzed in a computerized way with SPSS. The dependant variables were changes in self-efficacy and de-reification between T1 and T2. The basic arithmetic mean (\bar{x}) including the Standard Deviation (Std. Dev.) were calculated to describe the 'Normal Distribution'. To ensure that the scale items assessed the same characteristics of de-reification and self-efficacy their internal consistency was tested with Cronbach's Alpha (α). A further independent-samples t-test was conducted to compare the level of de-reification and self-efficacy at T1 and T2.

Qualitative Data Collection and Analysis

Qualitative Data Collection

This questionnaire was initially planned to be elaborated and expanded through the collection of qualitative material in the form of participant observation (Musante DeWalt & DeWalt 2002). I attended three different group sessions, which were included in the course design for students to discuss their learning diaries. Students also had to compile one main group diary, which was part of the course assessment. Interaction during the sessions was purposefully limited, however student group members enquired specifically about the lecturers assessment style, which couldn't be answered by the author. Additionally to questioning me about the assignment most students appeared focused on their mark. Handwritten notes were taken during the group sessions which were transcribed the following day. The data from the participant observation contained students' comments about their thoughts on the course and the lecturer. A number of students for example voiced their doubt pertaining to the lack of structure. Others reported to deliberately include content that they thought had little value but would *please* the lecturer.

In the initial research design the participant observations were only a supplement to the questionnaires, and were not meant to carry the research weight. Because the questionnaires didn't yield noteworthy results, the data collection was expanded to participants' learning diaries⁴⁵. While it is unusual for an MBA course to employ learning journals, this form of assessment is receiving increasing attention in higher education. An ideal learning diary should be more substantial than a simple log of events because it provides the intellectual

⁴⁵ I will use the term diary and journal interchangeably throughout this thesis.

space to review educational events and reflect on their connection to personal or professional experiences. Learning journals are used to prevent students from remaining passive learners (Dart et al 1998; Fulwiler 1980), and idiographic evidence for the incorporation of learning journals is provided by a number of scholars (November 1996; Jensen 1984; Bowman 1983).

For the diaries students were asked to reflect on the five days of the course, and the lecturer posed a brief set of questions⁴⁶, which served as a guideline for students who had little experience with journal writing. Most diaries however, did not use these questions and the diary formats differ considerably. Additionally to the different formats the degrees of openness varied, which means that students were aware of the journal as an assessment tool and might have chosen to include certain aspects or to include particular opinions while leaving others out. Yet, most students seem to have voiced their expectations and perceptions of the course. The learning diaries provided rich research data that enabled an exploration of the implications of integrating *Verfremdung* in management education. This qualitative data set consisted of 47 learning diaries (20 female and 27 male students) from course delivery one and two.

Qualitative Data Analysis

The data analysis of the learning journals followed a process with multiple readings (Miles & Huberman 1994) based on an alternate methodology. Students' diaries were investigated through the lens of an interpretive-descriptive approach (Thorne, Reimer Kirkham & O'Flynn-Magee 2004; Dart et al 1998) based on grounded theory. It attempted to understand and describe students' reactions to the course presentation, its various elements, and specifically *Verfremdung*. The investigation also endeavoured to interpret the meaning of these thoughts and to discuss the implications of film as *verfremdung* pertaining to Mezirow's transformational learning theory.

In a first step all diaries were read without a coding scheme, and without the proposed characteristics of film as *verfremdung* in order to gain a general overview of the material. Subsequent readings with a focus on reoccurring themes were aimed at data reduction. The process of open-coding (Corbin & Strauss 1990) was applied on a day-to-day basis, which

⁴⁶ The lecturer questions for the diaries are attached as Appendix 5.

means that for each course day all diaries were investigated for topics and themes they mentioned. For example, for Day 1 of CM1 some students wrote “I had seen firsthand a number of unsuccessful change projects” or “... many of the concept and words were quite familiar”. Those and similar statements were labeled with familiarization. The open-coding of CM2 was based on established concepts from CM1 but also added new themes.

While there were overlapping themes across all course days, topics initially displayed considerable variation. This first classification highlighted that different degrees of emphasis were placed on the praxis-relevant course topics and reflective themes that emerged. The daily results of the two courses were then compared to detect possible variations between Course 1 and 2. While these initial readings were valuable stepping-stones for the data analysis and provided first-order themes the material remained relatively wide.

To narrow the material further down and to help distinguish *Verfremdung* from other course elements, subsequent readings of the diaries were focused on a) participants’ responses to film as *verfremdung*; b) course content that resembled a more ‘normal’ business school curriculum, and c) general responses to *Verfremdung* pertaining to perspective changes and praxis learning. Distinct response patterns were discovered that established key course stimuli, namely the different course format or presentation; the virtual simulation; *Jamie’s School Dinners*; and film as *verfremdung*. Furthermore, participants’ reported educational and developmental outcomes were established in a separate ‘outcomes’ category. Based on the response patterns to the various stimuli as well as students’ learning and developmental outcomes, three different student groups were established: Uncritical, Selective, and Reflexive.

Ethical Issues

Because the above teaching intervention was designed to employ Brecht’s *Verfremdung* as an external event, which is meant to unsettle current views and stimulate reflection, it carried the potential risk of alienating students. While it is unlikely that *Verfremdung* can cause lasting or severe harm to an individual there are certain ethical issues, which had to be addressed. First, on the most basic level are the university regulations, which follow the Australian Code for the Responsible Conduct of Research⁴⁷. All research activities that involve

⁴⁷ http://www.research.mq.edu.au/for/researchers/how_to_obtain_ethics_approval/human_research_ethics

human or animal subjects have to be approved by the universities' ethics committee. Details about the recruitment of participants, risks and benefits, and possible conflicts of interests amongst others had to be provided for the ethics application. However, the ethics committee pays only attention that projects comply with all legislation, relevant guidelines and policies. It doesn't address the issue whether it is against ethical teaching practice to expose students to *Verfremdung*. Or in other words, whether a lecturer has the right to deliberately provoke students. While space and time restrictions prevent a detailed discussion on morals and ethics, which both refer to human conduct, I would like to briefly highlight the following issues.

As discussed in Chapter 1 Brecht's plays use *Verfremdung* deliberately to unsettle and to promote critical thinking. However, as his *Baden-Baden Cantata* clown scene which was performed at the Baden-Baden music festival in 1929 demonstrated, the use of *Verfremdung* can be risky. The scene caused riots, and allegedly made some female audience members faint from the brutally staged dissembling of limbs and the liberal use of (fake) blood. While *Verfremdung* in an educational setting will most likely not cause students to have a similar reaction like Brecht's audience, it can nonetheless be an uncomfortable experience to explore previously untested possibilities. However, I concur with Mills (1998) who suggests for the pedagogical context "... the passive intellect is unacceptable" (p. 21). For him a certain amount of risk-taking in a pedagogical setting is necessary to provide the space for critical thinking and reflection. Most students who were included in the present research came to the course with a certain understanding of what they expected to get out of the course and how the teaching sessions would be conducted. *Verfremdung* requires students to shift their attitude from knowing facts to not knowing how to build new opportunities into their existing worldview. This naturally entails some degree of discomfort.

This observation of *Verfremdung*'s riskiness resonates with Mezirow's (2000) suggestion that transformative learning can be a threatening experience, and Roberts (2006) concurs that "[d]isorienting dilemmas evoke every conceivable emotion in learners" (p. 101). This then appears to be a dilemma for *Verfremdung*. It is meant to unsettle learners but at the same time has to be integrated gently in order to not alienate students by causing too much discomfort.

Chapter Summary

This chapter begun with an explication of the case selection process, followed by an overview of the investigated change management course in order to establish the necessary context for *Verfremdung*. I also disclosed my epistemological mistake of attempting to capture *Verfremdung* with questionnaires, which while regrettable contributed to personal learning and emphasized the complex nature of *Verfremdung*. These considerations were followed by the discussion of data collection and analysis. The quantitative data analysis was based on standardized and computerized tests, whereas the qualitative data was mined with the alternate interpretive-descriptive method. The concluding consideration was designated to a mention of possible ethical concerns. The following chapter will continue the empirical part of this study, and provide a detailed overview of the findings.

4. Findings

The proof of the pudding is in the eating (Bertolt Brecht). While for Brecht a rioting audience⁴⁸ would have been sufficient proof that his concept of *Verfremdung* triggered a response, the present research set out to explore *Verfremdung* empirically. Because of the limitations of the quantitative data, as described in Chapter 3, the focus lies on the findings which emanated from the qualitative analysis of participants' learning diaries. The key outcome of this investigation is the findings-based suggestion that *Verfremdung* has taken place. The analyses of learning journals illustrated how students experienced and dealt with the less rigorous structure and the limited technical focus of the course. These experiences could be identified and organized in response patterns. For a number of students this pattern was interrupted by film as *verfremdung*, allowing the proposition that *Verfremdung* was experienced. Based on participants' different approaches and interactions with both the course and film as *verfremdung* I have created the groups of Uncritical, Selective and Reflexive, which are introduced in this chapter.

Quantitative Findings

The initial data collection focused on the quantitative material, namely questionnaires. As described in Chapter 3, a non-experimental pre-post-test design was used to test for an increase in self-efficacy and de-reification from time point 1, T1 pre-intervention measurement, to time point 2, T2 post-intervention measurement. As discussed in Chapter 3, in hindsight it became apparent that the erroneously applied quantitative approach was unable to capture the complexity of *Verfremdung*. However, because this belated insight contributed to the learning process, I briefly mention the quantitative findings here as they reappear at a later stage to describe my learning.

Self-efficacy

The three tasks for the questionnaires were chosen based on the content of the course, change management and the content of the *Verfremdung* intervention, which was leadership as performance. In detail, the tasks involved:

⁴⁸ See Chapter 3 of a description of the *Baden-Baden Cantata* clown scene.

1. deliberately using body language, tone and actions in a change management meeting to convey a sense of urgency
2. leading a change project by communicating meaning and legitimacy of goals to the team
3. motivating and inspiring the team during uncertain and confronting conditions.

To assess the self-efficacy for task 1, for example, the item asked respondents:

If you thought about your ability (RIGHT NOW) to deliberately use your body language, tone and actions in a change management meeting to convey a sense of urgency, how certain are you about how often you can do so?

The lowest performance level for task 1, for example, was “at least once per meeting”, while the highest degree of difficulty was “at least ten times per meeting”. For task 2 “lead a change project by communicating meaning and legitimacy of goals to the team” and task 3 “to motivate and inspire the team during uncertain and confronting conditions”, the lowest level of difficulty was “at least one member of my team” while the highest level of difficulty was “every team member”. Using the above-described approach of computing the four middle performance levels, the mean confidence level for each item for T1 was as follows:

Item 1 M = 6.28, SD = 1.81

Item 2 M = 7.53, SD = 1.75

Item 3 M = 7.13, SD = 1.90

For T2, the values were:

Item 1 M = 7.26, SD = 1.84

Item 2 M = 7.78, SD = 1.72

Item 3 M = 7.12, SD = 1.73).

The internal consistency of all three items reaches a high level for both T1 (Cronbach's $\alpha = .89$) and T2 (Cronbach's $\alpha = .93$). To test whether there was an increase in self-efficacy from T1 (pre-intervention measurement) to T2 (post-intervention measurement), a t-test for dependant samples was conducted for each self-efficacy item.

The analyses revealed a significant difference in the scores for self-efficacy Item 1 between T1 (M = 6.28, SD = 1.81) and T2 (M = 7.42, SD = 1.64), where $t(22) = -4.62$, $p < .001$.

For Item 2, however, there was no significant change between T1 (M = 7.53, SD = 1.75) and T2 (M = 7.84, SD = 1.54); $t(22) = -1.59$, $p < .13$.

Item 3 also showed no significant change between T1 (M = 7.13, SD = 1.90) and T2 (M = 7.20, SD = 1.72); $t(22) = -.28$, $p < .80$.

These results suggest that participants express significantly more task-specific self-efficacy for task 1 (“to deliberately use body language, tone, and actions in a change management meeting to convey a sense of urgency”) after than before the intervention, whereas for task 2 (“to lead a change project by communicating meaning and legitimacy of goals to the team”) and task 3 (“to motivate and inspire the team during uncertain and confronting conditions”) the level of task-specific self-efficacy did not change significantly.

De-Reification

The measurement of de-reification was approached with a three-item index. Because the concept of de-reification as such has not been captured quantitatively before, the three items were constructed based on the course content – namely change management. It contained the following items:

- It is common sense that what is crucial in change is to tell people the purpose and provide clear instructions about what is required.
- Managing change is always efficient or inefficient – you either have the knowledge and techniques or you don’t.
- When it comes to the crunch, a manager can do little more than be rational and responsible in working out what change activities have to be done, and allocate them accordingly.

Participants could endorse each item on a seven-point Likert scale featuring the gradations strongly disagree, moderately disagree, slightly disagree, undecided, slightly agree, moderately agree, strongly agree.

The internal consistency at T1 was found to have unsatisfactory internal consistence (Cronbach's $\alpha = .56$), whereas the internal consistency at T2 (Cronbach's $\alpha = .63$) reached a satisfactory level. Despite the internal consistency of T1 just failing to reach a satisfactory level, it was decided to calculate mean scores for the index at T1 ($M = 4.39$, $SD = 1.23$) and T2 ($M = 4.41$, $SD = 1.20$). A further independent-samples t-test was conducted to compare the level of reification at T1 (pre-intervention measurement) and T2 (post-intervention measurement).

The analysis revealed no significant difference in the reification scores between T1 ($M = 4.39$, $SD = 1.23$) and T2 ($M = 4.35$, $SD = 1.22$); $t(24) = 0.28$, $p = .78$.

Qualitative Findings

The analysis of students' learning diaries positioned *Verfremdung* within its present context of an MBA-level Change Management course, which has been described in detail in Chapter 3. While the MBA students in the present case were experienced managers who are used to voicing their opinion, it has to be kept in mind that the learning diaries were part of the individual assessment for this course. Most learning diaries revealed a form of judgment; some content was found useful while other content was criticized, which suggested that most students frankly voiced their opinions. However, a number of comments from the participant observation indicated that, while most students were outspoken in their learning diaries, others followed a 'marking agenda'. Or to say this in other words, some journals were written with a specific objective in mind. Some members of one participant observation group, for example, talked about the 5M framework and did not find it particularly useful. Nonetheless students of this group said they would still incorporate it into their diaries because they thought that the lecturer would like to see it. They called it to "suck up to him", which emphasized that learning diaries are not neutral self-reports but written for a specific purpose with a specific audience in mind. But this is not to suggest that a different setting would have produced unbiased reports. Qualitative data as the result of human experience can never be without bias because learners, as do researchers, have interests and preferences, which automatically neglect others or, as John Berger said, "we only see what we look at" (1972, p. 8).

Therefore in order to *see more*, the look for the present research was extended, and the first reading of the learning journals was carried out without a coding scheme, as mentioned in

Chapter 3. Its main purpose was to become accustomed to the material and to identify, amongst others, what students revealed about their background and study motivation. Numerous subsequent analyses clustered student statements into reoccurring themes, which were merged into categories that allowed insight into students' perceptions and experiences of the course, and their attitude and learning preference. Table 5 provides a sequential overview of the established categories and corresponding themes based on antecedents, stimulus and outcomes.

Antecedents categories describe conditions that students brought to the learning situation and whose influence is often on a subconscious level. While age and gender are inseparable from students and are unlikely to change, the educational and professional conditions don't have to be permanent. For example, participants' identification of their educational Engineering background could change to a Business background once they complete their MBA.

| | | | Uncritical Students | Selective Students | Reflexive Students |
|-------------|--------------------|-------------------|--|--|--|
| Antecedents | Student Background | Educational | <ul style="list-style-type: none"> • Mostly Engineering degree • No formal change mgmt. qualification | <ul style="list-style-type: none"> • Mostly Engineering degree • No formal change mgmt. qualification | <ul style="list-style-type: none"> • Mostly Engineering degree • No formal change mgmt. qualification |
| | | Professional | <ul style="list-style-type: none"> • Middle-managers • Certain amount of change mgmt. experience | <ul style="list-style-type: none"> • Middle-managers • Certain amount of change mgmt. experience | <ul style="list-style-type: none"> • Middle-managers • Certain amount of change mgmt. experience |
| | | Age | <ul style="list-style-type: none"> • Average 33 for part-time students • Average 28 for full-time students | <ul style="list-style-type: none"> • Average 33 for part-time students • Average 28 for full-time students | <ul style="list-style-type: none"> • Average 33 for part-time students • Average 28 for full-time students |
| | | Gender | <ul style="list-style-type: none"> • 7 female • 6 male | <ul style="list-style-type: none"> • 3 female • 7 male | <ul style="list-style-type: none"> • 10 female • 14 male |
| | | Challenging Event | <ul style="list-style-type: none"> • none | <ul style="list-style-type: none"> • Joining the army (past) • Migrating to Australia (past) • Merger of employer organization (past) | <ul style="list-style-type: none"> • Change project (current) • New role w/ same employer (current) • Increased job responsibility (current) • Structural changes of employer organization (current) |

Table 5. Three student groups

(continues)

Temporality is also a characteristic of the concept of what I have called *Challenging Event* in the above table that Reflexive students were grappling with at the time of the course. It was included as a background theme because it constituted an experience that students brought unconsciously to the change management course.

| | | | Uncritical Students | Selective Students | Reflexive Students |
|-------------|--|---|--|--|---|
| Antecedents | Student Disposition | Self-perception/ description | <ul style="list-style-type: none"> Over-confident Avoid conflict | <ul style="list-style-type: none"> Need for clarity and order Preference for structure Avoid emotions | <ul style="list-style-type: none"> Need for clarity and order Preference for structure |
| | | Expectations of course | <ul style="list-style-type: none"> Unspecific | <ul style="list-style-type: none"> Change management models, frameworks, universally applicable tools | <ul style="list-style-type: none"> Change management models, frameworks, universally applicable tools |
| Stimulus | Response to different course content/ format | Cognitive | <ul style="list-style-type: none"> Expect the unusual | <ul style="list-style-type: none"> none | <ul style="list-style-type: none"> none |
| | | Emotional | <ul style="list-style-type: none"> None | <ul style="list-style-type: none"> Dislike Averse | <ul style="list-style-type: none"> Frustration Sceptic |
| | Response to Jamie Oliver | Cognitive | <ul style="list-style-type: none"> instrumental | <ul style="list-style-type: none"> instrumental | <ul style="list-style-type: none"> instrumental |
| | | Emotional | <ul style="list-style-type: none"> none | <ul style="list-style-type: none"> none | <ul style="list-style-type: none"> none |
| | Response to Simulation | Cognitive | <ul style="list-style-type: none"> instrumental | <ul style="list-style-type: none"> instrumental | <ul style="list-style-type: none"> instrumental |
| | | Emotional | <ul style="list-style-type: none"> none | <ul style="list-style-type: none"> none | <ul style="list-style-type: none"> none |
| | Verfremdung | Experiencing <i>film as verfremdung</i> | <ul style="list-style-type: none"> Unmoved [Entertainment?] | <ul style="list-style-type: none"> Distancing Avoid estranged content Focus on other course elements | <ul style="list-style-type: none"> Dilemma Question habitual ways of thinking De-reification |
| | | Reflective Engagement | <ul style="list-style-type: none"> Unreflective | <ul style="list-style-type: none"> Reflection | <ul style="list-style-type: none"> Introspection Critical reflection |

Table 5. Three student groups

(continues)

| | | | Uncritical Students | Selective Students | Reflexive Students |
|---------|-----------------------|--------------------------------|---|---|--|
| Outcome | Educational Outcome | Praxis Learning (5M Framework) | <ul style="list-style-type: none"> • No praxis focus • Confirmation of existing knowledge | <ul style="list-style-type: none"> • Mapping | <ul style="list-style-type: none"> • Mindful • Masks |
| | Developmental Outcome | Self-Efficacy | <ul style="list-style-type: none"> • Increase | <ul style="list-style-type: none"> • None | <ul style="list-style-type: none"> • Decrease |
| | | Perspective Change | <ul style="list-style-type: none"> • None | <ul style="list-style-type: none"> • None | <ul style="list-style-type: none"> • Perspective change |

Table 5. Three student groups

(continued)

The concept of *self-perception* can be either conscious or unconscious, but in either case it is a condition that the learner brings to the classroom and that influences the learning experience. While Selective and Reflexive students consciously voiced their need for clarity, the self-perception of the Uncritical group appeared to take place on an unconscious level. Their self-description appeared inconsistent. For example, they described themselves as being curious and interested in learning something new, but at the same time continuously stated their familiarity with most of the course concepts.

Themes expressed as *Expectations of course* describe not only participants' anticipation of this particular change management course, but also their more abstract expectations of courses in the context of management education. While Chapter 1 discussed the need for scholars to adjust their view and practice of business education, and to refocus on critical reflection, the *expectations* expressed by Selective and Reflexive students – namely frameworks and models – exemplify that it is also necessary to adjust the anticipatory mindset of the learner.

The *stimulus* category contained one element that was established as illustration of essence, namely Jamie Oliver's show *Jamie's School Dinners*. The virtual case study was included because all students – variation permitting – included this training tool in their diaries, and it provided a valuable 'control stimulus' in the sense that it is more akin to traditional business school teaching.

While only the estranged *Braveheart* clip was planned *Verfremdung*, the alternative course presentation could have established an additional *stimulus* of *Verfremdung*. The category of

response to different course content/format was established to reflect participants' different reactions to the lecturers' alternative presentation/lecturing style. However, despite the initial ambiguity about what was perceived as *Verfremdung*, the *response to experiencing* film as *verfremdung* highlighted that participants perceived these two differently. *Verfremdung* was anticipated to stir learners' ability for *reflective engagement*, which was differentiated as unreflective, reflective and critical reflective.

While a lack of critical reflection usually holds learners back from transformative learning, it need not negatively impact informational learning. The last category of *outcomes* illustrates the benefits that students derived from this course. While the *educational outcomes* organized participants' key learnings pertaining to the 5M framework, the *developmental outcomes* illustrate the different benefits that can be derived from informational and transformational learning.

Correlation of Student Groups

The following paragraphs establish the similarities of the three student groups, while the differentiations among them are discussed later in this chapter. Although the similarities are not unusual or novel, they are important reference points that connect CM1⁴⁹ and CM2 students and hold the key to their comparability.

An initial inspection of the learning diaries found that course participants from both CM1 and CM2 shared a number of characteristics. An educational background in Engineering, for example, appeared to be common amongst MBA students. As mentioned in the discussion of traditional management education in Chapter 1, the decision to obtain a postgraduate degree in Business Administration is based mostly on the career needs and wants of learners. Students with engineering, science or other technical undergraduate degrees are often required by their employers to pursue formal business studies. However, none of the present students mentioned such external forces and instead the majority of learners referred to their limited change management experience as the motivator, as the following student-author explained:

My experience in 'change projects' is pretty limited as a Chartered Accountant, generally preferring the status quo over big change. The reason for choosing this

⁴⁹ The following discussion refers to the two investigated change management courses as CM1 and CM2.

subject is to increase my knowledge in this area, as I know I'll be exposed to more and more change situations in the future.

While a small number of students possessed more extensive experience, like one participant who "[had] been actively involved in and led change interventions in the past", it appeared that all students were without a formal change management qualification. This observation coincides with the organizational practice to place managers in positions regardless of their formal qualification. And large organizations often encourage internal staff transfers because they are conducive to knowledge transfer and the expansion of networks.

The enrolment data for the two courses showed that most students were middle managers and were undertaking their studies part-time, with only a small number of participants enrolled as full-time students. MGSM's course design takes into account that most students work full-time while pursuing their MBA, and offers block courses that are held on weekends, which was also the case for the present change management course. The participants' average age was 33 years for part-time students and 28 years for full-time students. All course participants had several years of work experience before they enrolled in the MBA program – students who have just completed their undergraduate degree are not accepted at MGSM.

Apart from these background aspects, similarities were also found in students' statements about the course content. While individual diaries commented on a number of course elements, two of them – namely the ExperiencePoint/GlobalTech simulation and Jamie Oliver's documentary – particularly stood out because they were mentioned at considerable length in all diaries. These two elements are discussed as 'similarities' because their inclusion in all diaries exemplifies that all CM1 and CM2 students were willing to engage with elements of informational learning. The *inclusion* of these two elements also highlights the partial *exclusion* of course content, which is discussed shortly.

The first content similarity, then, was the simulation, which was a virtual case study of a change management project. During this simulation student groups had to apply certain skill-sets and frameworks, and make the right decision at the right time in order to score points. Some students who gave particularly detailed accounts of the simulation process found that "[a]fter a rather ambiguous first day the ExperiencePoint simulation was a welcome addition". Others not only valued the increase in structure but also viewed this exercise from a practical perspective: "[t]he simulation has given us a number of tools to use in our own

future situations”, which can be viewed as an example of instrumental learning. Learners who rated Day 2 highly were also the ones who “[r]eally enjoyed the simulation” and were enthusiastic about this learning/teaching tool:

I found the simulation very interesting, and not just because we achieved the highest score! This is a really fun and interactive way to put our theoretical learnings into practice.

A small number of diaries avoided a longer discussion on that particular diary day; however, it was mentioned at some stage in all diaries. When it was not discussed at length on the day, some students, for example, simply provided a list of tactics that related to the simulation, such as “1. Understand, 2. Enlist, 3. Envisage ...”. And while a minority were unsatisfied with the quality of this course element:

[I]nlinearity of the simulation – no feedback loops, flexibility to modify actions (eg CEO speech) or use actions more than once, or at different times in different parts of the business – those subtleties are missing,

most learning diaries of CM1 and CM2 showed that the majority of students elaborated on the simulation. However, despite the variation in responses – ranging from excitement and fun to critical dissection of the functionality of the simulation software – it became apparent that most students remained on a descriptive level. They refrained from linking this exercise to their professional experiences, as in this descriptive recollection:

Group took a structured approach to this exercise. We began by understanding and categorizing all the available tactics into 7 steps of change. We then carefully selected (in sequential order) the activities and tactics to implement.

Some students mentioned that this day was more like a ‘normal’ business school course, and it is possible that this encouraged them to focus more on the content than on reflection. While a few isolated cases talked about the group dynamics during the exercise, the majority of the diaries focused on the importance of the established change management process of unfreeze – move – refreeze in a technical way.

The second theme that stood out because it was mentioned by all students was the documentary *Jamie’s School Dinners*, which in the words of the lecturer was:

an ‘inspirational’ story that permeates the whole course, and which is used not just as an illustrative case, but something that ‘gets their emotions going’, and

also serves as a basis for a reflective discussion of the case itself and how everyone interpret it.

Based on the lecturer's description, *Jamie's School Dinners* was identified as a pedagogical use of film in the sense of illustration of essence, which goes beyond textbook learning. All students mentioned the documentary in their diaries with various degrees of detail. The lecturer positioned *Jamie's School Dinners* as "[a] challenging video capturing all the dimensions of managing change". Depending on learners' preferences, students were free to explore either dimension – functional or emotional – of the show. Some students looked at Jamie's show from a more business-minded perspective, that is to say they analyzed the documentary with a change management framework: "[h]e has appeared to have not done any form of analysis, particularly in regards to the politics and culture". And another student commented, "One key learning was to ensure that you identify your stakeholders and learn as much as possible as you can about them, so you can include that in the map of your plan".

Other learners had a stronger focus on the portrayed passion and emotions, and how 'messy' the project appeared: "[t]he issues he is trying to address are a lot bigger and more complicated than he seems to have anticipated or prepared for". Or as another student-author found, "[o]ne of the other interesting aspects of observing the change process through the Jamie videos was the concept that change is always bigger than you expect". Hence, for many learners *Jamie's School Dinners* highlighted the informal and emotional aspects of change management. Students found that the documentary shows the 'ugly face' of change management that is often neglected in traditional business school education. But while students acknowledged Jamie's emotions, none of the participants expressed empathy as defined by Coplan (2009) to "imaginatively experiencing the character's experiences from the character's point of view" (p. 103). While the following example relates Jamie's behaviour to how the student-author would have acted, it does so on an analytical level:

Oliver's shocking tactics to show what exactly is in the chicken nuggets was effective in persuading the students The application of this tactic may require more considerations as I would suggest the key question is to whom I would use this tactic.

Some learners were doubtful of *Jamie's School Dinners* as a case study, "I was a bit sceptical that a manufactured documentary by a celebrity chef ... could be a useful education tool". But

despite their initial hesitation to learn from a fabricated entertainment product, most doubters developed an analytical eye for the show:

Jamie obviously jumped into this project with his heart fist rather than his mind, his motives are favourable but they were poorly directed and not thought through.

Differentiation of Student Groups

In addition to these similarities that were shared by CM1 and CM2 students, further analyses of their learning diaries helped to uncover response patterns that differentiated students on other grounds. The initial reading rounds led to a provisional clustering of students into two groups. While the Uncritical group emerged at an early stage of the investigation, the distinction between Selective and Reflexive students came later. Based on their almost identical backgrounds (*antecedents*), self-perceptions (*antecedents*) and response to the different course content/format (*stimulus*), the Selective and Reflexive groups were perceived as one group at the beginning of the study.

However, once the exploration shifted the focus to the second *stimulus* concept, namely film as *verfremdung*, their differences became visible. The initially homogenous group showed polar opposite responses to this deliberately included form of *Verfremdung*, and concluded the course with *outcomes* that suggested different forms of learning. This observation was crucial for the present research because it permits the suggestion that *Verfremdung* has taken place. Subsequent readings of the learning diaries, then, were based on the three student groups of Uncritical, Selective and Reflexive and focused on the question of why film as *verfremdung* was experienced differently. A more detailed investigation uncovered that numerous Reflexive students commented on a challenging event, with which they were coming to grips, that appears to have been the contributing factor to their receptiveness of *Verfremdung*. The remainder of this chapter provides a detailed description of these three different groups that further clarifies their distinct characteristics.

Uncritical Students

After organizing students into the final three groups, 13 students (7 female, 6 male) were labelled as Uncritical. Students in this group didn't voice any expectations for this particular course or management education in general. While the other student groups were clear

about what they expected to gain from spending two weekends in class, the Uncritical students seem to be open to whatever the course would bring.

Their response to the different course content and format illustrated that it didn't strike them as strange. Uncritical diaries didn't display signs that they were disturbed by the lecturer's use of uncommon teaching elements like video and role-play, and his approach to lecture agenda and assessments that was unstructured when compared with traditional business school education. They appeared to have been expecting the unusual, partly through word-of-mouth information: "I had been told by other students that if you are doing the managing change course properly you should feel really uncomfortable during the class". Others anticipated the unexpected from accessing available resources: "[t]he initial scan of the managing change course content folder had already started me thinking that this course would be very different to the core subjects". Students who read the unit guide carefully would have also picked up on the alternative course format because the guide states for the course assessments "[i]f you find these [assessment methods] complicated and difficult to understand, there are two reasons for this", which allows participants to expect the unexpected.

Based on their pre-course preparation, the Uncritical students were expecting an atypical MBA class and appeared not particularly fazed when they eventually attended the course. Their description of the various filmic elements, for example, appeared neutral and they discussed them in an unexcited manner: "The videos were quite a powerful tool to demonstrate the dynamics of change".

Additionally, the Uncritical students expressed not only their preparedness for the format but also their familiarity with the content. This familiarity stemmed partly from their attendance at other MBA courses: "which is something I learnt during a critical thinking course", and a judgement of most of the course content as "common sense and applicable to most change projects". Based on their learning diaries, the course served less to provide the learning of new concepts and ideas but instead confirmed existing knowledge:

In my personal time I was just watching it for entertainment, but as we watched it in class, I placed the change frame on and it became very interesting at how all the ideas and concept that I already knew could be applied.

Statements that highlighted the learners' existing knowledge "[t]his day reinforced my thoughts about prior preparation" were both numerous and present in almost all diaries of this group. Additionally, Uncritical students voiced not only their familiarity with the content but also their surprise that the other students were not familiar with a specific content element:

Interesting that credibility is something that holds managers back from trying to make change. Many of the other students conceded to this and I found that surprising, because I have always pushed myself to learn from the failure and keep going until I get it right,

which insinuates that Uncritical students were over-confident and judged their abilities as superior to those of their fellow learners. This kind of self-description stands in contrast to their frequent use of phrases like "I found this interesting and was looking forward to understanding the link", "I was eager to understand and engage with", "I was intrigued by", which initially suggested their inquisitiveness and openness to learning. But because these comments of interest were often followed by self-confirmatory statements, inquisitiveness appears an unlikely disposition. This focus on existing knowledge seemed to prevent Uncritical students from learning and acquiring new knowledge. The search for and focus on confirmatory course content was prolific in this student group. Students seemed to be looking for what they had learned previously, "reiterating what I had learned in prior change management programs; there is an emotional journey".

While the coding of Uncritical diaries uncovered this writing pattern, it appeared that students in this category didn't realize their confirmatory behaviour because they judged the lack of openness as having detrimental effects: "[w]hen you're over-confident you can create blinkers that then cause the problem for you". This comment was directed towards managers who believe that their experience saves them from making common mistakes and contributes to the failure of change management projects. While students in this group exhibited this kind of 'blinker-behaviour' pertaining to the course content, they didn't recognize it in a self-referential way. Despite participants' recognition of the need for reflection, it wasn't applied or exercised. The following example highlights this contradictory account of their learning, that is to say, students' realization that reflection is important but not applying this standard to their own behaviour. The writer began with "[s]elf reflection is important", and continued to mention three critical personal and professional change situations. But instead of a critical assessment and analysis of these situations, the student-author prematurely concluded his

train of thought with “[y]ou learn how to deal with the challenges ..., you know what to expect and it becomes normal”. While this student’s comment on self-reflection indicates its importance, there was a lack of evidence that the writer used the course material to practise reflection. This lack of receptiveness was also illustrated by another student’s discussion of the Leadership section⁵⁰ of the course with an elaborate professional example of himself: “[t]he following scenario describes a personal change situation where leadership and the right process were critical to a successful outcome”. He described the difficult situation that he was faced with, and how he applied his leadership skills:

Unconsciously follow[ing] the three step process of change management. I unfroze the dynamics and habits of the old team ... then continued with the moving stage, which took about a year, ... and the team continues to perform strongly, a clear sign of successful refreezing.

It strikes the investigative reader as odd that while the majority of Uncritical students included a variety of topics from the five-day course they didn’t mention having learned something new, or recollect professional experiences that contradicted the course content.

After the diaries revealed that the different course content and format didn’t move students to reflect, the investigation focused on participants’ response to *Verfremdung*. While only 1 out of the 13 students in this group did not mention the estranged *Braveheart* video, it didn’t increase critical awareness or stimulate reflection that could have led to a change of perspective. Students were looking for a simple confirmation of existing knowledge instead of complicating their level of understanding:

Being an admirer of this movie and having seen it many times before I enjoyed immensely the dissection of this scene. It is one of my favourites in the movie but what really struck me was ... seeing it with a female voice of not great conviction delivering the words. ... It confirmed for me a long-held belief that how you deliver your message is as important as the message itself.

The confirmation of knowledge instead of gaining new insights was a recurring theme for all course elements. Despite *Verfremdung* having the anticipated effect of de-reification, which unsettles current levels of understanding and stimulates the search for different perspectives, participants of the Uncritical group remained content with their existing level of understanding. In those instances where students didn’t state their familiarity with

⁵⁰ Day 4 – Masks

Braveheart, student-authors from this group nonetheless remained mostly on a descriptive level:

Performance observation: Through watching the *Braveheart* clip as well as in class demonstration it was made clear how different body language, confidence, ... tone, pausing, ... and expression can impact a discussion. The differences between motivating and demotivating were illustrated very clearly.

Based on the observation that the role-plays were described in more detail, it initially appeared that this particular course element made a greater impression. But it became visible that students chose to describe the creative process:

We worked well as a group to step through the demonstration. While I was the 'frontman' there was a lot of work in the group around content, structuring, props and so on.

While there were no direct confirmatory statements, some students tried to relate the role-play exercise to something familiar or previously experienced:

The role play reminded me how preparation is really important for building confidence. Practice is important too – I remember last term I was really nervous about the first presentation ... but by the time I did the fifth one I was feeling a lot better.

Despite this student's additional comment that they "find speaking in front of people easy", the role-play paragraph contains several mentions of the need for confidence, worries about hostile audience, and the consideration of employing a speaker who is "more thick-skinned". This relates to the earlier observation that Uncritical students didn't voice their concerns but instead gave the impression of control and confidence. While the self-perception of their confidence already appeared to be at a high level for Uncritical students, the findings from some diaries nonetheless suggest that their self-efficacy slightly increased. However, this increased confidence also took place in a confirmatory manner, similar to students' earlier expressions of familiarity. One student, for example, wrote "Day 4 just gave me the confidence ... to understand why this was needed". And in a similar vein another student felt "encouraged to not be afraid" of specific tasks in order to achieve certain outcomes. One student sums up the effect of the role-play:

I noted, afterwards, how hyped I was after this talk – I feel it was partly nerves and partly the power of the group ... [t]he presentation worked well and our group support (this is really going to happen!) made it more powerful.

The diaries are not conclusive about whether this increased self-efficacy was a lasting developmental outcome or only a temporary effect. Equally unclear were the educational outcomes. As described earlier, Uncritical students' diaries commented on various topics that they found interesting and memorable but this did not trigger specific learning outcomes, or the learning didn't seem to be something sufficiently memorable to have been included in the learning diary. The themes that students thought worth mentioning cover the whole range of the course, and there was not one topic or Day that was perceived as the key learning. What these students found interesting or noteworthy varied considerably amongst the diaries. Some found the more business-school-like Mapping day most valuable:

Day three further cemented the notion that change is unpredictable; however, with a 'map' we would be given orientation and guidance for our change initiative.

Other students translated the various functional elements of the virtual change management simulation to their work experience. The iceberg as a metaphor for what is really going on in organizations was also recognized by some students:

For me, the most significant symbol from this course was the iceberg. It is true that so many change initiatives concentrate on 'above the water' elements like structure, processes etc where in reality, the majority of the issues dwell beneath the surface with attitudes, culture, beliefs.

There were no common praxis learning themes or insights in a number of diaries, despite the inclusion of most course themes, as exemplified by one student who finished his diary by saying that he learned "so many valuable things". While he said that learning had taken place for him, his diary did not provide any evidence of what these things might be. Hence it remains unclear whether learning took place and he missed the opportunity to express it, or if he concluded with this specific remark to flatter the lecturer in order to get a good mark for this assignment.

In summary, this group was defined by a lack of reflective engagement with the presented material, which was signified by an over-confident attitude towards the course material and the frequent confirmation of existing knowledge. Students in this group appeared sufficiently

satisfied with what they know and illustrated no urgency to expand this beyond their current knowledge status. The learning diaries demonstrated a lack of topic focus, which means that these students undertook no in-depth examination and their educational benefit from this course remained unclear. Furthermore, the experience of film as *verfremdung* did not motivate students to question their assumptions, and didn't lead to a change in their perspective.

Selective Students

The Selective group consisted of 10 students (3 female and 7 male) who expected "[t]o be shown a model of how to make change work easily, effectively and efficiently". Contrary to Uncritical students, whose attitude was somewhat indifferent, Selective students had strong opinions and voiced them in an outspoken manner. They expected a 'normal' business school course, which would provide them with change management "equipment to embark ... on a change initiative at work ... [and] to fill up [their] management 'tool boxes'". Models, frameworks and best practice were at the top of this group's learning agenda:

Entering any new course on an MBA my expectation is naturally to gain knowledge and, due to being a very rational Engineer, also learn a number of models which can be applied to the outside world to create order.

Structure, efficiency, and to bring order to change management chaos were the main themes for these students. Selective participants acknowledged the difference of the course content and format by comparing it to a regular MBA format that provides a more structured environment. "Entering the classroom and being greeted with Doris Day singing 'Que Sera, Sera'" was not something these students expected from an MBA course, and it suggested a variation that "[did] not bode well for structure".

For some learners this deviation from the familiar MBA structure constituted an uncomfortable experience, which led them to doubt the rationale of this course:

Realising that this course ... is one of the fluffy ones .., made me feel more and more uncertain about the course and the likelihood of me learning rational models suitable for my engineering way of thinking.

As a result of this sceptical attitude, a number of students differentiated between content they accepted or rejected, which surfaced through their writing style. Some learners expressed thoughts, expectations and beliefs they subscribed to in first-person speech, for

example “[t]o manage these issues I will need to spend significant time attempting to map the various areas”. However, when they were in disagreement with the course content their writing switched to third-person speech, “[i]t is argued in the course that to manage a change program, one must be able to”.

While this kind of distancing initially appeared to be similar to the ‘conflict avoidance’ behaviour of the Uncritical group, the earlier outspokenness of Selective students’ voicing their dislike of the course suggested otherwise. Further investigation linked the preference for clarity and structure to Selective students’ comments to avoid emotions: “I have found it easier and natural to be logical and rational. I find it challenging to operate at an emotional level”. And another student found the concept of Masks helpful for “hiding some of my own emotions and ... adapting to a communication style appreciated by the audience rather than displaying my emotions”. The avoidance of emotions was openly recognized, and some of these learners used this acknowledgement for minor reflection:

Powerbases can be major obstacles as it is often linked with emotions and politics. ... Again an area where I’ll need to compromise my naturally tendency to rely on rational arguments over playing games and politics.

Despite their preference for logic and rationality, the diaries of these student-authors were not devoid of personal/professional experiences. A small number of students touched on a personal or professional event that had unsettled them in the past and which was brought back into their conscious memory through the course content:

Fundamentally the unfreezing is a difficult process. When considering unfreezing, I reflected upon my experience in the Australian Army. ... However, reflecting on this experience, I now realised how important the creation of a sense of urgency was in this change process.

Those students who brought up personal or professional experiences demonstrated the ability to engage with change subjects that had no immediate tool-like functionality. However, in accord with students’ initial request for change management tools, the main focus was directed towards the more tangible elements of the course: “this learning will help me to apply the techniques and effectively manage those changes and formulate the strategy for the future”. The learning diaries tended to cover favoured topics of the course like the functional elements of mapping – namely Gap and Forcefield analysis that formed part of the

Mapping discussion on Day 3. But while Mapping was related to these tools it also presented an alteration to the more rigid concept of planning, which was appreciated:

I know from preference that I like to plan what I do but this does not allow for variation or problems I might encounter. I can see how by using a map as an orientation device you are giving yourself the ability to be able to change direction especially if you encounter problems.

Additionally, the simulation was covered in great length and several student-authors provided step-by-step descriptions of what decisions their team made, how they reached the decisions and what steps they took:

In the Global Tech Case study, the core problem was identified as ‘lack of departmental integration’. We selected a number of tactics and [a] few are listed below:

Selective students’ preference for structuring and order – “[m]y strategy would be to develop a checklist with which I can evaluate how I progress through the implementation” – was particularly magnified once the focus shifted to the investigation of film as *verfremdung*. Only two out of the ten Selective participants included the estranged *Braveheart* video in their learning diary. Because only two participants included film as *verfremdung* in their diary discussion, this teaching element could have been too emotional or illogical for Selective students. Its exclusion suggests that the majority felt the need to distance themselves from this content and focus instead on more structured elements.

While slightly more students, four out of ten, commented on the role-plays, their main focus was directed towards the functionality of a performance. Some Selective students provided lists of characteristics that differentiated a motivational from a de-motivational speech. However, none of the student-authors reflected how and why these individual elements might impact their performance, and their descriptions remained aloof, as if they didn’t participate in the play. This was illustrated by one student who wrote, “as the class practised delivering ... speeches” and “[f]rom watching the role-plays”. While this student gained the insight that he “would undoubtedly have to focus on the non-visual to improve [his] speech technique”, he refrained from commenting on his groups’ performance or his involvement.

One student who decided to comment on the role-play didn’t go into the actual process but instead voiced his dislike of this course element:

The last thing of the day with creating, delivering and dissecting a presentation of a change project seemed a little misplaced in this course for me, too much focus on leadership and motivation in the actual delivery, rather than spending time assessing and practising building a case for the change.

However, similar to their response to film as *verfremdung*, the majority of students made the decision to not engage with this part of the course. While Uncritical students stuck to what they knew, and mentioned film as *verfremdung* and role-play in a confirmatory manner, the Selective group members mostly refrained from mentioning it. This exclusion was further emphasized by the inclusion of *Jamie's School Dinners*, as mentioned earlier in this chapter. Contrary to the estranged course content, all students incorporated comments on Jamie Oliver's documentary, and some participants used this documentary as illustrations for the course content of the individual days:

Poor Communication and lack of vision: thought they would just buy into the process. He did not tap into any stakeholder's emotions; he did not endeavour to find 'their hot buttons'.

Selective students' focus on the functional content ensured that they left the course with a clear educational outcome. While the diaries touched on several topics, the one day, and content, that stood out for most learners was Day 3 with its main focus on the concept of Mapping. This element of the 5M framework pertains to the process of planning the change process and, among others, includes methods and techniques that can be learned and applied. This outcome was congruent with Selective participants' preference for clarity and order, and their initially voiced expectations to receive models and frameworks. Yet, functionality doesn't exclude reflection that focuses on problem-solving, and a limited number of examples for reflection were to be found.

However, similarly to the previously discussed student group, Selective students neglected critical reflection. The developmental outcome of a perspective change was not identified for this particular group, and neither did they experience an increase in self-efficacy.

In summary, this group of students was characterized by a strong need for structure and transferable methods. They made their expectations for this course – namely to receive models and frameworks – clear, and responded to content that didn't adhere to this criterion with distancing. This behaviour was noticeable in the change of writing style and a detached

description of the events. With the exception of two learning diaries, this distancing pattern was particularly highlighted by the exclusion of film as *verfremdung*.

Reflexive Students

The third and largest group, which included 24 students (10 female and 14 male) displayed several distinct characteristics despite their initially perceived similarity to the Selective student group.

What stood out for this group was the mention of some job-related or professional event with which these participants were grappling at present. For one student, for example, it was structural changes in their company that involved the redundancy of a large number of senior staff. And another student mentioned a current change project several times throughout the diary. Other students were coming to terms with new jobs, department changes or increased responsibility for their present role. While a small number of Selective students also related important personal and professional events, those events were in the past, whereas this group of students reported current events.

However, the Reflexive students' initial expectations of the course were similar to those of the Selective group, which means that these students anticipated learning techniques and methods that would be applicable to *all* change management situations:

I want to do the course because managing change in organisations is a key activity that I have seen fail on a number of occasions, however I am looking for is a set of tools, techniques that I can take and apply back work. Something like "10 Steps to Managing Change" with some kind of methodology/practical application.

Similar comments to the above illustrated these students' need for clarity and structure, and gave the impression that participants of this group were looking for a quick solution to increase their change management skills. Or, in other words, "a series of steps on change management and what you need to do when you go back to work and apply these principles". Students within this group were outspoken about their initial rejection of the course's deviation from traditional business school elements, and even voiced a stronger sense of frustration than the Selective students:

I am very sceptical/undecided about this course. I have found it so far very abstract, high level and hard to grasp. ... I really disliked the pre-reading introducing the 5M framework and 7 Leaflets. ... it all seems very vague. I could

not stand the 7 Leaflets – quotes from poems or George Bernard Shaw. I have no idea what this has to do with business or the MBA and gave up reading after leaflet number 5.

This initial scepticism of the course's rationale was visible in numerous learning diaries. Students were 'put off', questioned their choice of this course, and wondered if and how they would benefit from it:

So what am I doing here, I came to LEARN! I need a specific list of steps, a methodology, and a template to memorise and apply in every single situation! What have I got myself into?

The exclamation marks and capitalized word LEARN in the above example make the frustration tangible for the reader. The expression of their unmet expectations is a distinguishing character for both this group and the Selective group, who also expected a change management toolbox. But what set the Reflexive students apart was their observable ability to overcome this early negative response. Instead of remaining in a kind of rejection mode they actively tried to get some value out of this course, and demonstrated a willingness to confront their unconstructive feelings:

My thinking of change prior to the course was heavily orientated towards execution of a set of process objects, where people would generally follow on directions of others. I couldn't have been more naive on this point.

Reflexive students also realized that the course led them through the motions and emotions of change management – "I have to Unfreeze my way of thinking and learn to appreciate this new way of learning" – which possibly allowed these participants to remain receptive and engage with most of the course content. Yet, in contrast to the learners of the Uncritical group, who also commented on the majority of course topics, Reflexive students didn't set out to confirm what they knew but focused on what they didn't know. In this process these learners demonstrated a much higher level of reflection and introspection than the other two groups:

Day three [Mapping] further cemented the notion that change is unpredictable, however with a 'map' we would be given orientation and guidance for our change initiative ... Further these maps will allow for reflection and a chance to discuss whether there should be a change in direction in the near future. This has been an area that I need to work on as I have recently found myself to be very rigid with my plans ...

As described earlier in this chapter, Jamie Oliver's documentary was included in the diary writing by all student groups. However, a small number of Reflexive students used it not only to describe their learning but also as a sounding board for their own behaviour in similar situations. This analysis started with a description of Jamie's behaviour: "[h]e was initially seeing the problem as one-dimensional ... [and] didn't give thorough consideration to the various stakeholders and their challenges". Which was then related to the participant's situation: "[t]his highlighted the need for myself to look deeper into the situation and ensure that I have considered as many elements as I can identify".

While this form of introspection relating to Jamie Oliver was infrequent, Reflexive learning diaries displayed a general tendency for introspection. Similar to their earlier mentioned frankness pertaining to their course expectations, they were also outspoken when they realized their flawed thinking process:

The realisation [that reasons for change need to be emotions-based and not only analytical] hit me like a Mack Truck, although the reasons provided are rational they don't go anywhere towards creating excitement and grabbing peoples' attention.

A number of participants found the need to pay attention to emotions a valuable insight, "I have always separated organisational and personal change and did not realise that the process and emotions you go through are the same." While the investigation of the diaries revealed that Selective learners avoided engaging in content that contained the risk of being too emotional or disruptive, Reflexive students demonstrated the opposite behaviour. They neither shied away from difficult content nor demonstrated their existing knowledge, but were open to learning and a critical assessment of their behaviour:

Covert resistance can be destructive. I am wondering if I have myself taken part in covert resistance, or at least not done enough to shut it down ... when I have become aware of it. I know I have sometimes taken the easier path in walking away ... In my role ... I should have intervened.

As mentioned earlier, this difference of engaging with complex content became particularly apparent in the different responses of these two groups to film as *verfremdung*. While the Selective learning diaries were, with few exceptions, devoid of the estranged *Braveheart* clip, it was included in the majority of Reflexive diaries. For some this was another trigger for introspection, "if someone had tried to explain this to me before the class, I would have

denied that I ‘perform’ or wear any kind of ‘mask’ and that I am always just ‘myself’”. But for other students it helped to start the process of critically investigating their habitual ways of thinking:

I kept thinking of a manager I had worked with before who seemed to embody many of the characteristics encompassed in the ‘Leading’ categories. Up until this point, I had never really rated this manager very highly ... This uncovered another assumption I had been making implicitly ... I realise now that his greatest strength was his ability to influence those around him ...

Because the student-author reported that he found the behaviour of this manager frustrating, it stands to reason that this constituted a kind of dilemma for the learner. Other learners were also motivated to direct their focus inwards, and look at their assumptions and beliefs:

I found I was questioning myself and my aspirations to manage bigger change programmes and a team of Change Managers. ... I ended up continuing to do things the same way I generally do them. I found I did not reflect enough on how I was making decisions ... This was mainly due to time constraints and other ... factors in my organisation. Will this environment change in future?

The learner continued to say that she started to reassess her career aspirations because she was faced with a difficult work situation. For others it was a difficult personal situation, like the following participant who was trying to make her brother quit smoking:

I realise that this is not going to work. I’m not trying to influence or persuade him, I’m just telling him what to do and there’s no reason why he should want to listen to me. It just gets him irritated and upset. I’ve got to try and persuade him to want to quit for himself – not that simple.

The trail of thoughts demonstrates that, while not all Reflexive participant had reached the stage of a perspective change, the transformational learning process had nonetheless been set in motion, as illustrated by her critical self-examination.

The role-plays were another part of the course that was excluded by Selective students but included by Reflexive students. While students in this group started the course with a feeling of discomfort or uneasiness, most of them revisited anxiety for this particular part of the course:

While I wasn't comfortable with the "role playing" aspects of the day, I did take a lot away from watching the video clips, the performances, and identifying which elements of each performance were persuasive.

In comparison with the other groups, it appeared that Reflexive participants benefited most from this teaching intervention. For some students it provided new insights, "[a]fter the discussions and role play today, I feel that the role of masks in a change setting is vitality [sic!] important." While for others their 'failure' in presenting a coherent speech triggered additional thoughts:

Our task ... was a complete "stuff up" This of course went over well with the group ... and they gave us a hard time for the rest of the afternoon ... This situation made me consider how we treat people, how quickly we make judgement on what may be complex issues and how readily we put on the mask that suits.

While Uncritical students didn't demonstrate an observable educational outcome, and Selective students focused on the Mapping theme, Reflexive learners found their key learnings were the concepts of Masks and Mindful, part of the lecturer's 5M framework. Masks pertain to the leading of change projects and highlight leadership as performance, which is illustrated by the role-plays. While Uncritical students found their self-efficacy slightly increased by this course element, Reflexive students were again at the other end of the spectrum. Some learners found this particular concept not as simple as performing a role-play but that they instead "[would] require a bit of time to master the use of masks, while I understand the need for it". This notion of needing time to practise also became visible in the description of one learner's attempt at practising to wear different masks, "[m]y challenge with wearing masks well is to overcome the difficulty in not letting my emotions impact or alter my delivery against my planned performance". This student continued with a description of a personal experience where her emotions got in the way while she had a difficult conversation with a colleague, which confirmed to her the need for further practice wearing different masks.

The second educational outcome of being Mindful goes beyond applicable tools and techniques, and prepares the ground for a change management approach that looks at the informal aspect of organizations and human motivation or resistance pertaining to change. A number of learners recognized this concept as one of the key elements of change management that is often omitted from the planning process:

In change management programs, the change agents in the team are so task focused and self-absorbed that they are not aware of what is occurring in the surrounding environment. ... The agents in the team are so immersed in running their own agendas, that they fail to take notice of their stakeholder's engagement levels.

But students didn't look only at others' lack of being Mindful, but directed the focus towards their own shortcomings, "[t]hinking now about my expectations of these staff and my surprise at their defensiveness I understand that ...", and she continued by saying, "I realised I didn't actually know how my staff viewed the current state and whether their perspective was similar to mine". Similar to the above-described response of being a novice practitioner who yet has to master the use of Masks, this slight decrease in self-efficacy could be noticed for several of the concepts and themes from the course. As one student commented on their realization of the political dimension in organizational change, "I do not feel confident enough, I think that it is a long process". Most Reflexive participants acknowledged that they would be able to incorporate the newly learned concepts and approaches to change management only with further learning and practice, as one author summed it up, "[k]nowledge of change strikes me now as a wise man's art".

With this acute awareness for their own behaviour, the present student group was able to accept the challenging nature of the course as an opportunity for the form of real learning that is described in Chapter 1. Despite their initial frustration, Reflexives students accepted this opportunity – "[t]aking a good hard look at myself, I can see that I have certain habits that I need to navigate away from or change" – which let them arrive at various stages of the transformative learning process.

In summary, this group of students decided to engage with the course and showed the ability to actively suspend their preset expectations, despite initial feelings of confusion and frustration. Reflexive students were able to overcome those feelings and showed the ability and willingness to question habitual ways of thinking. Critical reflection surfaced from a number of learning diaries and the majority of Reflexive students also demonstrated a high level of introspection and reflection pertaining to various course elements. Additionally, Reflexive students maintained a critical stance towards their capabilities of putting their new insights into praxis. For this group the soft science of change management, which relates to people issues and the idea of leadership as a kind of performance, constituted their main

focus. Participants of the Reflexive student group experienced film as *verfremdung* and responded with critical reflection and the initial stages of perspective transformation.

Chapter Summary

This chapter began with the description of the quantitative data that didn't provide statistically significant results but which nonetheless contributed to my learning process and provided valuable information for this thesis. Starting the qualitative analysis wide allowed capturing a number of relevant aspects that contributed to the identification of response patterns. Students were identified by their background, or in other words by characteristics that they had no control over at the time of the course. This included for example their educational background, gender, and whether they were facing challenging events in their lives. Similar attributes were found amongst course participants which also corresponded to the 'normal' or generic MBA student profile. These similarities first, established their connectedness for the purpose of analysis, and second, surfaced in which areas they differed. With one exception, namely the relating of challenging events, which was an antecedent, differences emerged from the analyses of responses to the various stimulus elements: the alternative course presentation, Jamie's School Dinners (illustration of essence), and the estranged *Braveheart* clip (film as *verfremdung*). It was found that participants' responses to these stimuli guided their learning and developmental outcomes. Based on these responses I organized learners into the groups of Uncritical, Selective and Reflexive students. The following chapter will discuss these groups, their implications for management education, and furthermore focus on insights pertaining to film as *verfremdung*.

5. Discussion

The previous chapters have established the context for an exploration of the learning potential of *Verfremdung* in management education. At the outset this thesis determined that the development of critical thinking skills is often missing from business school curricula that focus on functionality. This is a disadvantageous condition not only for the learner but also for organizations. Brecht suggested *Verfremdung* as a safeguard against uncritical reception, and anticipated that *Verfremdung* challenges habit with the unexpected, initiating critical awareness and reflection. The latter being a crucial element for the process of perspective transformation, which Mezirow sees as the central dimension of adult development. The present study found that not all learners perceived *Verfremdung* as unexpected, and neither were the anticipated benefits experienced and expressed by all course attendees. Based on the response to the course in general and *Verfremdung* in particular, I organized students into three groups: Uncritical, Selective and Reflexive. In this chapter I analyze the key findings – first, on the basis of students similarities, and second, differentiating them by group.

While the investigated change management course already deviates from conventional MBA education by adding arts-based teaching elements and providing a more holistic view of change (see course outline, Appendix 2), participants can still focus on skills and techniques if they chose to do so. Hence, the course provided a suitable environment for the inclusion of film as *verfremdung*.

The following table provides a brief overview of the similarities and differences between participants of this study which enabled the comparison.

| Similarities | Differences |
|---|--|
| Educational background | Self-perception |
| age (average) | expectations of learning outcomes |
| current career level | response to different course format |
| no formal change mgmt qualification | response to film as <i>verfremdung</i> |
| response to simulation | |
| response to <i>Jamie's School Dinners</i> | |

Table 6. Overview of student similarities and differences.

At the most elementary level – previous education, age, occupational level, gender – both courses, CM1 and CM2, resembled a coherent group of students similar to that of the average MBA student profile at MGSM. The MBA is most frequently viewed as a career-enhancing degree either based on the learners' objectives or as a requirement from organizations. Because none of the students suggested that they *had* to attend the MBA program, I suggest participants' key objective to have been career enhancement. Middle managers are usually at a stage in their working life where they need to distinguish themselves from co-workers in order to progress their career. While some of the students had some change management experience, none of them held a formal qualification in this particular area. This suggests that the majority of students chose *change management* as an elective in order to gain a form of competitive advantage in their current situation as well as to prepare for future projects.

Traditional business school education is tailored to this form of study motivation because of its intense focus on praxis-relevance. The usually heavy workload of MBA studies – the present change management course for example is based on an average workload of 160 hours⁵¹ – leaves students with little time for topics or subjects that don't provide them with tangible knowledge gain. Part-time students invest their scarce spare time for the degree and want to spend as little personal resources as possible to 'get through' the program. Full-time students often have to work as efficiently as possible towards completion because of financial constraints, which are generated by the combination of high tuition fees and no income. In light of this kind of learning environment – which is marked by time, money, and career pressures – students' focus on outcomes is the norm.

This outcome focus was found in the unanimous engagement in the virtual simulation by all three student groups on Day 2. The majority of students perceived this day to be more like 'normal' business school education because it gave them "a number of tools to use". Tools often constitute easily accessible knowledge that is unproblematic. By focusing on frameworks and models, students don't have to challenge their learning with the complexity of the business world in general and change management in particular. Unfreeze – move – refreeze was what most participants were looking for, and the majority didn't feel the need to respond with reflection to the simulation process. The journal entries highlighted that most students followed the simulation in a standardized way:

⁵¹ 40 hours in class and 120 hours self-study and assignment preparation.

We therefore started with [a] simple mapping exercise of allocating the possible event to each of the seven stages and remove those events we did not think useful.

Because the simulation is a teaching tool that explicitly requires students to apply their analytical skills their journal descriptions of the processes that were followed and the frameworks applied were not unusual. However, a similar focus on praxis relevance was identified in student-authors' accounts of *Jamie's School Dinners*. This documentary was unanimously included in learners' journals, like the simulation. Despite the initial scepticism from a small number of students pertaining to the usefulness of a "manufactured documentary" all participants included the show in their journal discussion. While the functional dimensions of the show were observed and analysed, its emotional aspects fascinated students as well. For example, initially Jamie is struggling to gain the support from one particular dinner lady – Nora, the main school cook. The documentary captured their at times quite verbal (swear words were not cut out) struggles and students acknowledged that change is an emotional development:

I could see in Jamie Oliver's video, emotions play an important role in the change process, ... [and] ... are a key element in managing change: first, addressing my own emotions when there are emotional attachments involved. Second, many of the stakeholders could be affected in the change process ...

Yet, while participants found the portrayal of emotions "interesting", they were not too engrossed with the drama to have been paralyzed with empathy. Brecht suggested that the traditional theatre, in our case the traditional use of film, contributes to empathy, which hinders a critical reflective process. However, students here neither reported particular empathy with Jamie – or one of the other characters – nor demonstrated critical reflection. The observation of a non-emotional as well as non-reflective response in this particular case refutes my earlier Brecht-based assumption (see Chapter 2) that film as illustration and thesis are generally prone to empathy that "triggers emotional reactions, which are not in the interest of the audience" (Brecht in Hecht 1970). It stands to reason that for Brecht's theatre as well as film as *verfremdung* the response depends on how the student-audience's approach the material. If students set out to learn instrumentally from illustration of essence, then the risk of empathy is minimal. This response might differ if students approach pedagogically used films in a more leisurely, entertainment way.

Yet, for the present study participants analyzed the various elements of the show in terms of change management praxis. The following quote aptly expressed how the majority of students perceived this film-based case study:

Using the Jamie Oliver programme as an example really did an effective job of framing change outside of the traditional textbook style of the MGSM MBA. I think there is a rather practical application to looking at change from such an unique perspective. Take the lunch ladies for example, there are stakeholders within my organisation that operate in equivalent (albeit much different) roles.

The literature review of filmic representations in management studies has revealed that most educators use films to make business content easier accessible, which corresponds to Satre's (cited by Freire 1996, p. 57) "'digestive' or 'nutritive' concept of education" as well as to Brecht's description of the culinary theatre, where knowledge is fed to the audience/learner. Used as an illustration of essence method, Jamie's show embodied change management processes, which textbooks could not express as aptly. For example, the pressure of change projects, which students learned through watching the protagonist retreating crying to the cold-room. Yet, despite this more integrated view of change projects, participants were not motivated to critically question their view of this scene. Instead learners had the impression that if Jamie had been better prepared there wouldn't have been the need for a meltdown:

The result at the end of the first disc was chaos the kids had a buy in of about 10%, the head mistress was at Jamie's throat for being over budget, ...what a mess ... Emotionally he and all around him were being tested. From a project management prospective Jamie was not demonstrating control.

I suggest that when film is used as a case study, which can be analyzed it becomes separated from the benefits that have been attributed to art. Based on students' reported learning outcomes, it becomes apparent that students perceived Jamie Oliver's show in a similar way to the simulation – both teaching methods encouraged students to refer to their developing management toolbox in order to reduce the ambiguity of the process and introduce certainty:

Route Map – Jamie invited [the] head school teachers to his restaurant to buy in his idea (unfreezing). He then asked the dinner ladies to join a boot camp to train up their cooking skills (moving). He made new recipes for [the] school meal (refreezing).

This exemplary descriptive approach to the change management three-step of unfreezing – moving – refreezing removes the complexity from Jamie’s project and instead makes it appear more manageable. While this method to arts-based teaching is an engaging addition to the curriculum, in Brecht’s words I suggest it to be a *culinary affair* – serving up the dish of change management to MBA students. Based on participants’ responses to this pedagogical use of film I speculate that *Jamie’s School Dinners* was perceived as a visual substitution for textbook learning. And while students’ comments suggest that it did provide them with a more holistic view of change, a number of participants believed that it was only Jamie’s lack of change management skills that made the process messy. Because learners in the present study had the option of employing analytical skills or engaging with the ambiguous aspects of Jamie’s change project, the filmic case study allowed participants to remain within their existing framework. This is congruent with Mezirow’s (2000) observation that “[i]f we are unable to understand, we often turn to tradition, thoughtlessly seize explanations by authority figures, or resort to various psychological mechanisms, such as projection and rationalization, to create imaginary meanings” (p. 3).

Contrary to illustration of essence then, film as *verfremdung* was based on the assumption that Brecht’s *Verfremdung* challenges a student-audience in an artful way that doesn’t allow the simple reduction of complexity but instead creates a temporary space of incomprehension. A number of scholars (Louis & Sutton 1991; Piaget 1977) have found that intellectual development takes place when a learner encounters a problem that can’t be solved with his currently available knowledge. Based on these assumptions, the following paragraphs initially establish the context for participants’ different responses in order to then discuss their different reactions to film as *verfremdung* in particular.

Uncritical Student Group

Students who were organized into the Uncritical group had no prescriptive mindset about what they expected from attending a change management course. They were open to the content and overall unfazed or unchallenged by the course and its atypical format. Some participants from this group even expressed that they explicitly expected to experience a non-traditional MBA course:

I had been told by other students that if you are doing the managing change course properly you should feel really uncomfortable during the class.

In addition to being prepared for the unconventional course presentation, students continuously highlighted their familiarity with the taught course content – either through other MBA courses or professional training – and expressed surprise at their fellow students' unawareness:

Emotional & Political – Apparently this is often forgotten??? I have been trained in my current organisation to ensure that you always understand the emotions that it's in fact more important than anything ...

Based on their, and all other attendees', lack of formal change management qualifications and limited praxis in this field, the Uncritical students' over-confident behaviour appeared peculiar. Common sense would suggest that there must be *something* new or different for novice learners of any subject. This is particularly the case in light of the observation at the beginning of this chapter that this course is not part of the compulsory MBA units and students had some form of self-motivation to attend the course. It stands to reason that if they hadn't been interested in learning about change management, they could simply have avoided the course. This behaviour also appears unusual in the context of management education, where students often regard themselves more as paying customers than learners, and have clear expectations pertaining to their MBA education (Gibson 2010; Rapert et al. 2004).

This contradiction was further highlighted by the observation that Uncritical students included the majority of course topics, contributed personal examples, and used key phrases that included the words "interesting" and "curious". The initial reading of Uncritical diaries gave the impression that these students were open and eager to learn. But subsequent analyses revealed this behaviour to be a decoy strategy related to conflict avoidance and worries. Based on the observations of over-confidence and a preference for avoiding conflict, I speculate that Uncritical students were driven by impression management motives and feared having their limited competence⁵² exposed. This is congruent with Argyris' (1993; 1991) suggestion that defensive learning barriers are usually established by learners who feel threatened by having their knowledge shortcomings revealed.

⁵² With limited competence I mean that students are competent in some areas but not others. For example being competent in financial accounting but not in change management.

Because Uncritical students included the majority of course elements – albeit superficially – they avoided not only internal conflict but also external conflict pertaining to the lecturer’s assessment of their learning journal. Although individual learning diaries cannot be linked to students from the participant observation, the observation revealed that some student-authors included course content in their diaries despite not finding it particularly useful. During one participant observation session some students expressed their concern about putting their names on the group report. This came up during the discussion of the lecturer’s question (see Appendix 5) “What did you leave behind? Why?” Students interpreted this question as an inquiry into which content they found not useful, and mentioned that they didn’t want the lecturer to know what they found less valuable. Based on Uncritical students’ overall protective behaviour – which was found in their stating of familiarity with concepts, looking to confirm existing knowledge, directing no criticism or particular attention towards any elements of the course, and no inclusion of any past or current personal or professional struggles – I speculate that these comments from the group discussion corroborate the earlier observation that Uncritical student learners were driven to maintain and manage the impression they were making. This situation highlights the difficulty of motivating learners to engage with a reflective learning diary if it is part of the assessment. However, based on the earlier observation of the study motivators, and the often existing time and financial pressure, I suggest that MBA student’s would need another incentive, or in other words external force, to engage with such a reflective writing exercise.

Moving the focus to the arts-based teaching methods, the analysis revealed that they had no particular effect on this group of learners. Similar to the earlier description of students’ reception of Jamie Oliver’s show, the Uncritical students’ engagement with this documentary was on an analytical level. While the majority of students demonstrated a willingness to suspend their disbelief and accept a televised documentary as a case study, they were not ready or motivated to overcome their habituated response pattern, which for this particular group was additionally marked by their above-described behaviour of self-promotion:

The Jamie Oliver video was an interesting change case study. In watching it and immediately reflecting on it, my reaction was that Jamie had approached this project totally the wrong way. Or at least not my preferred way. ... In my view he had missed a great opportunity ... he did not consider all stakeholders ...

While the earlier discussion on Jamie’s School Dinners has established that this kind of instrumental use of film is beneficial for informational learning, this group of students didn’t

describe praxis-related learning outcomes. Or in other words, Uncritical students appeared to have finished the course with the same knowledge with which they started. However, some Uncritical students hint at an increase in self-efficacy, based on their existing level of knowledge: “[s]o when I heard that is where you start, I felt reassured that I have been doing that”. I suggest that learners from this group of students used the course as a validation of their current change management abilities, and they felt more confident after having their skills externally confirmed.

While *Verfremdung* was defined earlier as unsettling, this particular group of students were unfazed and unmoved by film as *verfremdung*, and instead related to it in the sense of film as illustration:

The Braveheart clip was useful in demonstrating the power of staging. The impact of the clip being replayed with a female voice ... clearly illustrated the importance of stance, tone and timbre ...

However, because participants’ didn’t differentiate between different course content, and their observations pertaining *Braveheart* remained on a descriptive level, I propose that *Verfremdung* did not take place for Uncritical students. Transformational learning starts with an individual’s confrontation of reality, triggered by an external event. But since participants kept a distance to the majority of course content and events, *Verfremdung* was not experienced as an interruption. Because students didn’t voice expectations of management education in general, and the change management course in particular, it didn’t leave them open to be unsettled. By providing a glossy personality surface, students avoided for *Verfremdung* to find a hold. While these participants acknowledge the importance of reflection in an organizational context they didn’t demonstrate the willingness or ability to engage in introspective behaviour. Uncritical students did not engage in critical reflection and didn’t illustrate any signs of perspective transformation.

Brecht saw the need to unsettle his audience, so that they would think for themselves. But in his writings he didn’t consider different audience/student dispositions towards insightful thinking and critical reflection. Having identified three different responses to film as *verfremdung*, I speculate that *Verfremdung* did not ‘work’, or in other words was not experienced by uncritical students. Argyris (1991) writes “[i]f defensive reasoning is as widespread as I believe, then focusing on an individual's attitudes or commitment is never enough to produce real change”. His suggested solution is to “teach people how to reason in

a new way – in effect, to change the master programs in their heads and thus reshape their behavior” (p. 106). But Argyris’ suggestion posits a serious challenge for business schools which Mezirow aptly illustrates with a word game:

He does not think there is anything the matter with him
because
 one of the things that is
 the matter with him
 is that he does not think that there is anything
 the matter with him
therefore
 we have to help him realize
 the fact that he does not think there is anything
 the matter with him
 is one of the things that is the matter with him (R.D. Laing cited by Mezirow
1978, p. 100)

Considering the amount of time – 13 years – that has lapsed between Mezirow’s and Argyris’ thoughts on adult learners defensiveness it appears like an ongoing challenge. Because participants of the Uncritical group are impression managers, they don’t provide educators any ‘contact surface’. While there might be no conclusive answer to this pedagogical dilemma, it needs to be addressed nonetheless. The present student group illustrates the detrimental effect that defensiveness can have on learning outcomes: neither informational nor transformational learning was experienced.

Selective Student Group

Contrary to the conflict avoidance behaviour of the Uncritical group, the observed response patterns for Selective students found that they had expectations pertaining the learning outcome of the course, and expressed them at the beginning of their learning journal. This group of students expected models, frameworks – something tangible that they could take back to their workplace and apply to a wide range of change situations. However, when realizing that the course followed an alternative logic and would not provide a set of skills, they voiced their concern:

Realising that this course ... is one of the fluffy ones .., made me feel more and more uncertain about the course and the likelihood of me learning rational models suitable for my engineering way of thinking.

A number of students highlighted their Engineering degree, and some cited it as an explanation for their preference for structure, consistency, and clarity. Additionally to their own admission, this inclination towards order was found in their content-focus on instrumental, tool-like elements of change management. Participants of the Selective group wrote particularly elaborate about the simulation, which served the course as a virtual case study and provided learners with an opportunity to go through a set of strategies. This preference for a structured case study that engaged their analytical frame of mind is congruent with students' background in engineering or physical science – which is similar to the majority of MBA students in general. Because these technical disciplines traditionally provide little exposure to subjects that have no immediate praxis relevance, Selective students were most at ease during the simulation and found the Mapping element to be their key learning outcome. An aggravating factor for this focus on structured content was participants' preference to avoid emotions where possible. While some learners showed a strong disregard for emotions, others admitted to finding it difficult to work with their own and others emotions. This predisposition becomes amplified and reinforced through workplaces that focus on functionality and disregard the emotional aspects of their employees⁵³.

However, despite this preference for avoiding emotions and expecting formularized answers, Selective students included some of the arts-based taught content in their learning journals. For example, most students accepted Jamie Oliver's show as a televised case study, and Selective students were no different. Their natural inclination for order made these students become particularly engaged with trying to "see method in his madness". The latter comment exemplifies how most students approached this arts-based teaching method: informational learning was actively sought by participants through analyzing, organizing, and making sense through the use of the 5M framework.

⁵³ On a personal note, I have made this observation during my longstanding work experience in investment banks. When my current employer laid-off a large number of people due to the global economic recession, they gathered the employees together for a speech from the CEO. At the end of his speech he advised employees of the dismissal procedure. They were asked to return to their desks, and if they were made redundant they would receive a phone call from the HR department. Furthermore, they were instructed in that case they would have to take their laptop and Blackberry, hand these items over, and were offered optional counselling before they had to vacate the premises. The feelings of these employees and their co-workers were disregarded, and the anxiety level remained high for subsequent years. This example highlights how organizations often try to standardize highly emotional processes.

Because the majority of MBA students have been trained to acquire new skills in such a mechanistic way – either through technical-focussed undergraduate studies or preceding MBA courses – this behaviour has become second nature to them. This is not to say that it doesn't challenge their mental capacities but it suggests that their intellects respond with trained behaviour patterns. Schütz (1944) called this kind of behaviour 'thinking as usual', which is employed by students to "obtain the best results in every situation with a minimum of effort" (p. 501). The engagement with complexity that doesn't lead to right or wrong answers however, is a more laborious process than reducing available information with routine-based sets of analysis. Furthermore, the grappling with ambiguous situations can be emotionally challenging, which these particular learners have professed to consciously avoid.

But notwithstanding this control seeking behaviour, Selective participants demonstrated a deliberate effort to make sense of the various course elements by engaging in the much less instrumental arts-based teaching approach of role-plays. However, a smaller number – only four students – included this teaching element. Because the role-play didn't lend itself to being immediately dissected and transferred to a framework in their usual analytical way of thinking, students reduced the material by providing an itemization of characteristics that are required for an inspirational speech, for example.

The third major art-based component of the course, namely film as *verfremdung*, was mentioned by only two students. The decline of included arts-based content correlates with and highlights the increase of its ambiguity. Expressing in numbers how many students included the different content magnifies this observation:

Jamie Oliver – 10 students

Role-Play – 4 students

Film as *verfremdung* – 2 students.

As reiterated throughout this chapter, *Jamie's School Dinners* were analyzed like a case study, and provided the opportunity to train specific skills, which had immediate praxis relevance. The role-play – though already mentioned by a lot less students – was made functional by some learners with a focus on characteristics that contribute to an inspirational speech, turning them into tools that can be applied.

Film as *verfremdung* however, didn't offer the opportunity to remove its ambiguity with a reductionist analysis approach. One student-author who mentioned film as *verfremdung* attempted to press this course element into an instrumental, framework-guided mould:

As demonstrated by William Wallace in his dramatic act in the movie *Braveheart*, effective leadership performances play a critical role in motivating people ... Whilst recognizing the powerful effect leadership performance can have on people, I came to the realisation that for most of organisations, change agents need to have more fundamental measures in place to motivate others ...

This participant used *Braveheart's* motivation style as a stepping-stone for a prolonged discussion on Key Performance Indicators (KPIs), which he concludes with the suggestion that KPIs as a motivational tools are superior to emotional motivation. While this student begins his discussion with the estranged *Braveheart* clip, he loses completely sight of it after the first couple of sentences. Despite his effort to solve the learning problem that *Verfremdung* posed, he had to go off-topic because the estranged *Braveheart* clip did not enable him to make praxis-relevant sense of it. This example of attempting to address different forms of knowledge with the same perspective seems like the proverbial hammer that makes every problem look like a nail. I speculate that if Selective students had more than a 'hammer', which means the capacity to engage with problems and solutions that don't follow a cause-effect logic, their response to film as *verfremdung* had been less deprecatory.

Based on their predispositions – need for control and disregard for emotions – their response to film as *verfremdung* can be described with a three-step process: first, complexity is perceived – second, habitual sense-making fails – third, participants withdraw from film as *verfremdung*. Despite the lack of engagement with this particular teaching intervention I propose that *Verfremdung* has been experienced by Selective students. In a Brechtian sense it interrupted *mechanical causality* but did not lead to critical reflection or an otherwise heightened consciousness. Yet, an increased awareness is a necessary condition for perspective transformation that would lead participants to a better understanding and ability to deal with complexity in the workplace:

[M]anagers are not confronted with problems that are independent of each other, but with dynamic situations that consist of complex systems of changing problems that interact with each other. I call such situations messes. . . . Managers do not solve problems: they manage messes (Ackoff 1979, pp. 99-100 cited by Jeong & Brower 2008, p. 223).

Film as *verfremdung* was included in the course content to explore ‘what *Verfremdung* does’ or in other words what its effects are. Considering that Selective students engaged with other course content but isolated and excluded film as *verfremdung*, I suggest that *Verfremdung* has an unsettling effect. This applies even more in a business school context than in theatre because the majority of learners expect to challenge their analytical tools and not to have to confront themselves on a personal, emotional level. While the traditional use of film has been found to work with existing perspectives, film as *verfremdung* has no determined objective. It is an invitation for learners to build their own perspectives. Because the openness of *Verfremdung* allows students to engage in critical reflection without determined boundaries, it can lead to a change of perspective in the sense of Mezirow’s transformational learning theory.

However, transformational learning is an emotional process that challenges learners on levels of consciousness that go beyond strategic analysis. Dirkx (2006) for example found that critical reflection, which plays a crucial role in perspective transformation, “may be accompanied by various emotions, such as guilt, fear, shame, a sense of loss, or general anxiety” (p. 19). These prospective emotions appear daunting for any learner but in light of their predispositions even more so for Selective group students. Hence, while these participants experienced *Verfremdung* they were not able to accept its invitation to make their own interpretations, which would be based on reflective engagement and not habitual thinking. It stands to reason that if management learners are not able to confront *messy* learning situations, or in other words engage in learning that contradicts conventional business school wisdom, they will apply the same logic to their management practice.

I have speculated earlier that if Selective students had a sense-making repertoire and not only one framework, namely the instrumental focus of business education, they would be able to confront ambiguous learning and work situations. This is congruent with the call for an inclusion of the humanities in management education (Colby et al. 2011; Gagliardi & Czarniawska-Joerges 2006). Integrating liberal learning into business school curricula offers management learners the opportunity to develop an appreciation for the exploration of different forms of knowledge. The current situation of management education is a circular logic – because business schools teach instrumental skills, learners have come to expect to learn instrumental skills, and because learners expect instrumental skills, this is what business

schools teach. Business schools need to interrupt this *catch 22* on an institutional level, and cannot leave it up to the learner to dictate the curriculum.

Reflexive Student Group

Reflexive students, as described in Chapter 4, initially appeared identical to the Selective student group. They too expected frameworks and models that would make change management accessible and above all manageable:

I had expected as a part of the curriculum that there would be case studies of major organisations which had both succeeded and failed, and with my new models in hand I would have the tools to assess what steps were missed and how they could have improved the roll out and pace of their various programs.

The majority of course participants were middle managers, who were, and most likely still are, advancing their career. In most organizations entry-level and mid-career managers need to demonstrate a high degree of proficiency and accomplishment in their field in order to progress. This resonates with my experience in the financial services industry where managers are highly skilled experts who are required to attend a set number of training sessions each year to update their skills. Training pertaining to people skills on the other hand, is only introduced at a later career stage, leading up to senior positions. Hence, the majority of MBA students is not only trained in a technical discipline without exposure to social and behavioural topics but a large number also work in organizations that value technical expertise the most. Reflexive students then, similar to participants that were grouped as Selective, voiced their frustration with the different course content and format when they noticed that they wouldn't be provided with the expected change management toolbox – after all, they “came to LEARN!”.

However, what sets these students apart from the other groups is their demonstrated motivation to overcome their initial response to the course content and “engage in [it] with an open mind”. Throughout the course these participants kept an open mind. They also frequently engaged in introspection and reflected on past experiences in light of course content that was less instrumental and thus didn't lend itself to analytical reduction. The majority of Reflexive students focused on non-instrumental change characteristics and their key educational outcomes from the 5M framework were Mindful, and Masks. As mentioned before, a large number of organizations still avoid the emotional and informal side of work-

life, hence Mindful and Masks elements have less praxis relevance in the sense that they don't convey technical skills. At the beginning of this chapter I speculated about Reflexive students' motivation, and suggested that most participants chose to attend the course for career purposes. This was congruent with their initially voiced expectation to receive change models and technical skills. However, their focus on the less tangible or 'soft science' elements of change implies that these participants adjusted their expectations.

I speculate that the reoccurring inclusion of professional issues or challenging events that a large number of these students were experiencing at the time of the course contributed to their revised expectations. A comparison with the two other groups revealed that while Uncritical students did not report any challenges, some of the Selective students included past events that they found difficult. Reflexive students were experiencing *current* events. While both student groups relate challenging events, I speculate that the time of the events governed their experience of film as *verfremdung*. Some students responded to the de-reifying effect of *Verfremdung* with introspection: "if someone had tried to explain this to me before the class, I would have denied that I 'perform' or wear any kind of 'mask' and that I am always just 'myself'". But for other students in the Reflexive group it helped to start the process of critically investigating their habitual ways of thinking "I found I was questioning myself and my aspirations to manage bigger change programmes [sic!] and a team of Change Managers". *Verfremdung's* unsettling capacity provided the necessary distance to view a problem from a different perspective, and amplified an existing dilemma for some learners.

Based on Reflexive participants response to film as *verfremdung* I propose that these learners experienced *Verfremdung* and that it magnified their existing challenges, leading to critical reflection and perspective transformation. This is congruent with Scott's findings (Scott 1991 cited by Taylor 1998, p. 41) that suggest that an external event can stir an existing internal dilemma. Because Reflexive students were experiencing a *current* phase of transitions and uncertainty they were looking for answers beyond functional knowledge, more inclined to search outside their existing logic. This relates to Mezirow's (1978) suggestion that:

certain challenges or dilemmas of adult life that cannot be resolved by the usual way we handle problems – that is, by simply learning more about them or learning how to cope with them more effectively. Life becomes untenable, and we undergo significant phases of reassessment and growth in which familiar assumptions are challenged and new directions and commitments are charted (p. 101).

He describes transformational learning as a progression through the stages of i) disorienting dilemma, ii) progressive reflection and iii) adjustment phase. For the present study perspective transformation was identified in Reflexive learners' diaries by their progression through the various stages of reflection. Students 'mulled' their problem over, expressed how they felt "I was frustrated that they just weren't 'getting' the new business strategy", but also demonstrate the inwards directed characteristics of critical reflection "I realised that I didn't actually know how my staff viewed the current state". While some learners didn't reach a conclusive answer to their problem during the course, others planned a course of action on how to address their challenge:

I have undertaken to schedule regular analysis time in my diary – initially half an hour a week, to reflect on key developments during the week, and try to identify common themes, learning and areas for development.

The majority of students had not gone through the full cycle of perspective transformation at the time of journal writing, which became visible in some students' slight decrease of self-efficacy. Before students reintegrate their new perspective into their lives they need to build "competence and self-confidence" (Mezirow 1995, p. 50). But because students' perspectives were de-reified, and they questioned their assumptions their initial reaction was insecurity. Realizing to not having the 'right' answer anymore can be a daunting experience. But based on the progressive reflection that learners' voiced I speculate that they will reach the final adjustment phase, which is marked by "[a] reintegration into one's life on the basis of conditions dictated by one's new perspective" (Mezirow 1995, p. 50). I propose that even if the perspective change was not fully completed at the time of their journal writing the initiated process of critical reflection had a lasting effect. A number of studies (Fewell 2001; Barlas 2000; Clark 1991) have found that participants who experienced transformational learning found themselves being different from who they had been previously. Once learners realize that their old or current ways of thinking are flawed it will be hard, if not impossible to ignore these thoughts. Students would have to deceive themselves, or in other words trick their mind into acting against better knowledge. But based on the active search for new perspectives that these learners demonstrated this behaviour seems unlikely.

While management education can't anticipate whether learners' are experiencing a challenging event in their life, the profile of MBA students lends itself to the speculation that the majority will be grappling with *something*. In their late twenties to early forties most

individuals go through phases that involve a number of professional and personal events. This could be the advancement of their career or marriage and establishing a family. Based on the large number of students that were organized into the Reflexive group – slightly over half of the participants – it stands to reason that other MBA courses would have a similar student audience. Mezirow (1978) has suggested that individuals who experience challenging events are naturally looking to resolve these but often come to the realization that their existing assumptions or beliefs are not adequate. If it is indeed the case that the majority of learners are grappling with issues, then business schools need to provide opportunities for learners to engage in critical reflection. Such a support would not only contribute to the intellectual and personal growth of learners but also be beneficial for organizations. Employees, who have the capacity to think outside their routines and acknowledge that problems are rarely one-sided will be the ones who contribute to an organizations progression. While habituated thinking and acting is prevalent in organizations, participants of the Reflexive group believed that this is changeable and were looking for a different perspective.

What these different perspectives look like remains the responsibility of the learner. In his play *Mother Courage*, Brecht made one character ask “what happens to the hole when the cheese has been eaten?” (Brecht 1978, p. 564). While in the play this question is rhetorical, it has a deeper meaning that can be translated to the present learning situation. By removing the cheese – existing perspectives and certainty – *Verfremdung* makes the hole – not having adequate answers for current challenges – in learners’ lives visible. What students do with the hole once it has been made visible depends on their predispositions and life situation.

Discussion Summary

As mentioned earlier in this chapter, course participants for the present case study were characterized by similarities and differences, which crystallized as patterns. The learning diaries were analysed in numerous readings. Initially, a general overview of the material was established, followed by subsequent open-coding readings to identify response patterns. I will briefly reiterate the differences in order to illustrate how I arrived at the distinction of the three groups, and its meaning for film as *verfremdung*.

| | Group 1 | Group 2 | |
|-------------------------------------|--|---|--|
| Self-perception | over-confident avoid conflict | need for clarity avoid emotions | need for clarity preference for structure |
| Expectations of learning outcomes | unspecific | models, frameworks | models, frameworks |
| Response to different course format | cognitive: expect unusual emotional: none | cognitive: none emotional: dislike, averse | cognitive: none emotional: dislike, frustration |
| | Uncritical | Selective | Reflexive |
| Response to film as verfremdung | unmoved | distancing, avoidance | dilemma, de-reification |

Table 7. Overview of differences for the three groups.

As the above table illustrates, I initially only recognized a two group pattern – Group 1 and Group 2, which showed different responses in their self-perception, their learning outcome expectations, how they responded to the different course format. As described earlier Group 1 was rather unfazed and unmoved by the course, whereas Group 2 struggled particularly with the different course format. However, Group 2 was further separable by their reaction to film as verfremdung. While Group 1 (Uncritical) appeared unmoved, further readings uncovered that students in Group 2 displayed different response patterns to film as verfremdung. While one part (Selective) of Group 2 responded with avoidance by omitting a description of film of verfremdung from their diaries, the other part of the group (Reflexive) felt it to be an uncomfortable dilemma that forced them to probe deeper into their assumptions. These behavioural patterns can be compared to Russ Vince's (1998) cycle of emotions that promote or prevent learning. The anxiety that is created by the different course design and its estrangement ensemble stimulate a flight/fight reaction for the Uncritical students' group. Subsequent readings of the data suggested that some students of Group 2 were able to hold the anxiety that was created by the overall unstructured teaching ensemble, they responded to film as verfremdung with a flight/fight reaction (Selective). The omission in their diaries suggests that these students noticed Verfremdung but did not respond as anticipated with critical reflection.

While the absence of this teaching intervention from their diaries does not provide a conclusive answer pertaining to what happened, I speculate that film as verfremdung triggered an avoidance strategy because it created too much discomfort. Their response surfaced an important link between Mezirow's transformative learning and Verfremdung. Baumgartner (2001), Robertson (1996), and Mezirow (1991) suggest that for transformative learning the learner needs to possess a readiness for change and retain an open mind. The

process of transformative learning is challenging in that it involves the collapse of a learner's existing perspective. Hence, as long as the learner is not ready to shift their consciousness – or does not have the need to do so – *Verfremdung* remains a toothless tiger. As stressed before, the omission does not provide a definite answer pertaining to these students' emotional state and thoughts but it suggests that film as *verfremdung* was not perceived as mere informational learning.

This proposition is strengthened through comparison with the Reflexive students' behaviour, who exhibited various progression stages of transformative learning in response to film as *verfremdung*. Compared side by side these two different behaviour types demonstrate that Mezirow's idea of a disorienting dilemma or trigger event for transformative learning is a complex process. While a teacher/lecturer considers how to facilitate transformative learning or in other words how to create the trigger event that activates this process, it is ultimately the learners' choice whether they choose to engage in this kind of deep learning. Or in other words, transformative learning is a complex interplay of students' predisposition, the choice of trigger event, and students' interpretation of and response to the trigger event. The present case study demonstrates that trigger events do not necessarily have the desired outcome of transformative learning.

CONCLUSION

This thesis began with the observation that while habitual thinking and acting are indispensable elements of everyday life they limit critical thinking and judgement, often unconsciously, when and where it would be required. I have drawn on support from numerous scholars and continued their proposition that current management education is frequently inadequate in eliciting a critical reflective response. Most often, traditional business school curricula focus on the delivery of instrumental skills and tangible frameworks that can be handed to students as tools to manage more efficiently. Yet, as the financial and political turbulences of the past decade have demonstrated there is a strong need to change the existing ways of processing and interacting with this rapidly changing and increasingly complex environment. I have suggested that the prevalent reductionist form of management education is not only insufficient but also that it unnecessarily restricts management-learners' thinking scope. Functional knowledge and competencies are without doubt necessary for managers but they need to be balanced with the ability for complex seeing and thinking. One aim of this thesis has been to renew this request and refocus the pedagogical lens on critical reflection.

In order to look outside the logic of traditional management education I have investigated Bertolt Brecht's artistic concept of *Verfremdung* because of its objective to promote independent and critical thinking. Numerous scholars have drawn on arts-inspired teaching methods to foster learning that goes beyond rational functionality and instrumental learning, based on the assumption that artful interventions provide interruptions from habituated thinking patterns. Art and arts-based learning provide not only a different access to knowledge but also enable the discovery of new or previously hidden thoughts. By approaching issues more obliquely than science-based education artworks demand a different attention, which differs from 'normal' thinking processes. The main reoccurring claims for the learning effects of art are:

- heightens awareness
- adds complexity
- releases imagination

- creates a sudden sense of new possibilities; and
- restrains habitual responses

While Brecht developed his concept of *Verfremdung* with a focus on emancipatory education, it was aimed at theatre audiences. I have drawn on Mezirow's transformative learning theory in order to bridge the world of art with the field of management education. His transformational learning aims at eliciting critical reflection that can lead to perspective transformation. Mezirow suggested that perspective transformation is usually triggered by an external event that either provokes an existing internal dilemma or that poses itself as a disorienting dilemma, which motivates the learner to critically inspect their assumptions and beliefs. This suggestion coincides with Brecht's assumptions about the effects of *Verfremdung*: interrupting habitual seeing and thinking, creating a state of temporary incomprehension, and leading to critical insight.

In order to investigate the implications of introducing the concept of *Verfremdung* to the field of management education, this thesis explored the question: *What is the effect of Verfremdung in management education?* Based on Brecht's suggestions for *Verfremdung* an excerpt of the movie *Braveheart* was estranged and integrated in an MBA-level change management course. While *Verfremdung* is an umbrella concept that can be integrated in a number of artforms, the present study chose film because of the immediate access to knowledge that this medium can provide. In allusion to the current two major strands of the pedagogical use of film – film as illustration and film as thesis – I coined the term film as *verfremdung*. While the existing film approaches are targeting informational learning, film as *verfremdung* was based on the assumptions of transformative learning. Because *Verfremdung* was integrated in films and situated in the framework of transformational learning it was anticipated that the exploration would provide insight to these three fields of knowledge.

After an initial epistemological mistake of attempting to capture *Verfremdung* with questionnaires (see Chapter 3), the subsequent analyses of course participants' learning diaries provided a rich data source for the investigation (see Chapter 4). Various student responses and learning outcomes surfaced, which were expressed through non-reflective, reflective, and critical reflective thoughts. Based on the findings I have suggested that these different responses depended on several factors. First, a number of antecedents could be

established: students' educational and professional background; age; gender; and current/past challenging events. Second, several key stimuli were identified: the course content and presentation; which deviated from traditional MBA education; the use of a documentary (*Jamie's School Dinners*); a virtual case study simulation; and film as *verfremdung*.

The various responses to these stimuli led to the organizing of students into the following three groups: Uncritical; Selective; Reflexive.

Uncritical: this group of students responses were mostly unreflective to the various stimuli. Uncritical participants frequently stated their existing knowledge about change management and exhibited over-confidence, which was speculated to be impression management. The various stimuli had no particular effect. These students didn't experience *Verfremdung* in the sense that they didn't seem to find anything strange about film as *verfremdung*. Because of their lack of topic focus and unreflective engagement with the course in general these learners experienced neither instrumental nor transformational learning. Self-efficacy was identified as their developmental outcome.

Selective: these participants voiced their expectations to receive change management tools and responded with doubt and strong criticism to the different MBA change management course format. The virtual case study simulation was well received and analytically attended to. After initial doubt of Jamie Oliver's show it was approached in an instrumental way. Subsequent analyses surfaced their need for structure/clarity and dislike of attending to emotional aspects. Based on this predisposition these students responded with distancing to film as *verfremdung*, which suggested that they experienced *Verfremdung* but were not willing/capable of engaging with it. Because of their focus on functional, praxis-relevant skills their educational outcome was instrumental. No developmental outcome was observed.

Reflexive: learners who were organized in this student group initially displayed similar response patterns to students from the Selective group, namely voicing the expectation to learn a set of change management skills that are universally applicable. However, they demonstrated the ability to overcome their initial feelings of confusion and frustration with the different course format and showed a willingness to question their habitual ways of thinking. These participants also demonstrated a high level of introspection and reflection to various course elements. Subsequent analyses uncovered that this adjustment of their initial

response was related to current challenges these students were experiencing. While the simulation and Jamie Oliver documentary were mostly approached in an instrumental way, they experienced *Verfremdung* as a trigger event that surfaced the issues they were grappling with. Their educational outcome highlighted their focus shift, as their key learnings were the ‘soft’ aspects of change management. Because of their analytical as well as critical reflective engagement their developmental outcome was perspective transformation. However, these learners maintained a critical stance towards their capabilities of putting their new insights into praxis and a slight decrease in self-efficacy was noted for these learners.

Central Conclusions

As stated in the introduction of this thesis, the main purpose of this thesis was threefold. First, *What can we learn about Verfremdung?*. Second, to further knowledge of the pedagogical use of film, and third, to provide insight to the use of the arts for transformational learning in management education. The following paragraphs will address each of these points.

1. What have we learned about Verfremdung?

Because the concept of *Verfremdung* is currently under-theorized in the context of business school education, the first task of this study was to explore the effects that *Verfremdung* has on management learners. While the general aim of *Verfremdung* is to prompt critical reflection, my findings and discussion show a less linear effect, and instead more nuanced pattern of the responses it elicits. In his concept of *Verfremdung* Brecht didn’t account for preset assumptions of the audience – learners in the present case – but instead made the effects of *Verfremdung* appear in a cause-effect sense. And while Brecht assumed that it had to be in the interest of human beings to question their assumptions, my findings in this research suggest that the experience of *Verfremdung* in an educational setting relies strongly on the attributes of the learner. When students approach learning in an unreflective way *Verfremdung* has little to no observable effect. Furthermore, students of the Uncritical group have demonstrated that *Verfremdung* only exists as a reciprocal relationship with learners. The technical aspects of *Verfremdung* – the dubbed *Braveheart* clip in the present case – were visible to all students. However, ***Verfremdung as a form of affect only comes to life through its acknowledgement.***

But even when *Verfremdung* is acknowledged it does not automatically lead to critical reflection, as participants of the Selective student group have illustrated. Or in other words *Verfremdung*'s challenging nature is a necessary but not sufficient condition to instigate transformational learning. Selective students responded with withdrawal from this particular course content and I speculate that this is based on the complexity and state of incomprehension that *Verfremdung* created for the majority of these students. The Reflexive students experienced *Verfremdung* because they were searching for answers that a mechanistic management logic could not provide. The space that *Verfremdung* opened was used by these learners to engage in critical reflection. The findings for the Reflexive student group support the proposal that ***Verfremdung* mediates transformative learning by initiating critical reflection.**

However, ***Verfremdung* cannot be instrumentalized** as a teaching tool. While I have suggested film as *verfremdung*, this approach should not be viewed as a standardized teaching approach. It was used in the present context to explore *Verfremdung* and serves as an illustration for the integration of *Verfremdung* in management education. When *Verfremdung* is standardized it becomes commonsense, loses its ambiguous characteristics, and doesn't act as the interruption that is required for higher-level learning. In order to catch students 'off-guard' it has to be continuously reinvented.

2. What have we learned about the pedagogical use of films?

In the present study Jamie Oliver's show *Jamie's School Dinners* had the task to illustrate the concept of change management, contributing to an understanding of the interrelatedness and complexity of social and organizational processes of change projects. This objective was expressed by the lecturer as "something that 'gets their emotions going', and also serves as a basis for a reflective discussion of the case itself and how everyone interprets it". Based on this objective the use of the show was congruent with the arts-based teaching process of illustration of essence.

However, course participants demonstrated a strong focus on analysing the show to test their newly acquired change management tools. While the acquisition and practice of functional skills is necessary, such an analytical case study approach is far removed from what art can bring to the table of management education. Because instrumental knowledge dominates business school curricula, arts-based knowing – often being only a supplement that *jazzes up*

the curriculum – gets forced into the scientific moulds of management frameworks instead of being seen as having intrinsic value in itself. Hence, while the intention was to use it as illustration essence – which balances the generally mechanistic management view with a more holistic perspective – the traditional use of film turned Jamie Oliver's show into a visual textbook extension. My critique is then, that when it is perceived with a narrow, instrumental focus the **traditional use of film allows students to remain within their habituated ways of thinking.**

When film is used in such a functional way, **different forms of knowledge are treated as if they were identical.** This kind of equalization of knowledge has the effect that the choice of medium – art or otherwise – doesn't seem to make a noticeable difference to the learning outcome of the learner. The equal treatment of the different forms of knowledge also seemed to hold back the learners that remained in their habituated ways of thinking from engaging with this particular filmic representation in a more holistic way. As a result, this approach to knowledge and learning seems to **restrict learners to informational learning, rather than engaging in reflective, critical learning.** And although this kind of learning does allow for reflection, it doesn't introduce management students to ways of knowing that extend their current understanding. I propose that arts-based teaching has to be treated in a more differentiated way. When they are used with an analytical praxis-focus, arts-based tools only remotely resemble art. Or to generalize for the purpose of emphasis: **arts-based teaching does not equal teaching with the arts.**

3. What have we learned about transformational learning in the context of *Verfremdung*?

Mezirow's transformational learning theory with its focus on perspective transformation has proved a fruitful educational bridge for the investigation of *Verfremdung*. A number of scholars have suggested that critical incidents, problems, or in Mezirow's words 'disorienting dilemmas' are required to trigger higher-level learning. The findings of the present study illustrated that *Verfremdung* can initiate critical reflection – but not necessarily in all students – which is a crucial element of perspective transformation. The study has also demonstrated that a large number of business students are dealing with difficult situations in their life. However, the traditional business school curriculum caters for instrumental and not transformational learning – the detrimental or limiting effects of this state of management education have been reiterated throughout this thesis.

Transformational learning is at its core an individual process. Individuals go through phases that pose challenges, yet because this is not a constant state **learners do not always need transformational learning**. Another factor adding complexity to this situation is that **individuals might not be consciously aware of their need** for perspective transformation until an external trigger, like *Verfremdung*, is experienced. This observation has been made during the present study. Participants of the Reflexive group arrived at the course with expectations for instrumental learning but were motivated by *Verfremdung* to surface an underlying issue. This means for **management education** that it **needs to provide a platform for transformational learning**, or in other words, it needs to move away from a purely instrumental focus in order to establish a learning environment where both forms of learning are possible. Mezirow suggests that an adult educator:

does not simply act as a passive ‘facilitator’ of learning but as an empathic provocateur, gently creating dilemmas by encouraging learners to face up to contradictions between what they believe and what they do, ... discrepancies between a specific way of seeing, thinking, feeling, ... and other perspectives that may prove more inclusive, differentiating, and integrative of experience (1990a, p. 366).

The integration of humanities in business school curricula helps to prepare students to deal with uncertainty and questions that don’t have black-or-white answers. When students move away from their often mechanistic view of the world they then move into the space where they can be more receptive to course content that is ambiguous, challenging and which creates Brecht’s temporary state of incomprehension. It is the moment of incomprehension that opens the space for learner’s to turn their gaze inwards. This thesis has established that the inclusion of artful interruptions – opposed to arts-based tools – can lead to critical reflection and perspective transformation in management education.

Limitations of Findings

Despite the correction of the initial methodological flaw, my study has clear limitations. First, the number of participants was limited to a small sample, and second the research site was only one business school. Both of these factors impact the generalizability of the findings. However, because the participants illustrated numerous educational and professional characteristics, which are common for MBA students it does allow for careful extrapolation of the findings. Future research on *Verfremdung* might address this issue by contributing to

findings from different business schools. Third, the research focused on film as *verfremdung*. This leads to the question whether the integration of *Verfremdung* in different artforms, like paintings or music might affect student differently? Additional research is required to clarify whether a chosen artform impacts the reception of *Verfremdung*. The fourth and last limitation I would like to point out is that the research findings did not lead to insight pertaining to students' reintegration of their perspective transformation. While I have proposed a findings-based speculation that it is likely that the perspective transformation will have a lasting effect, only a long-term study with a larger sample could give a more conclusive answer to this.

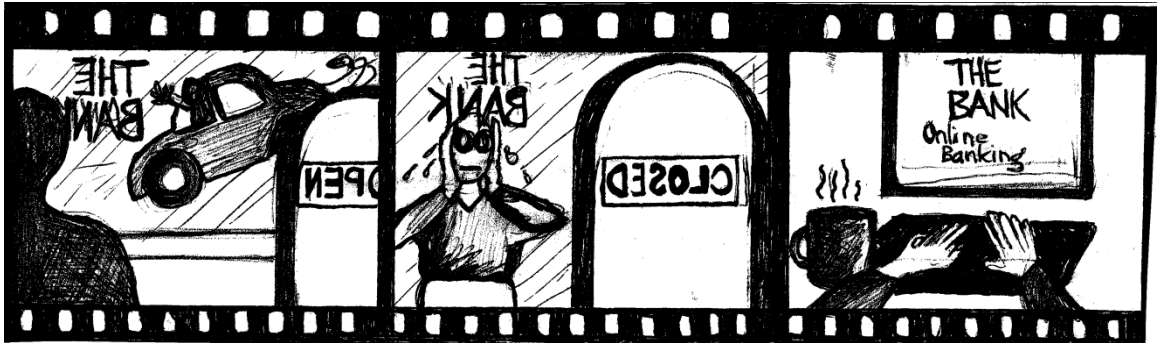
Questions

While this study has answered the research question *What effect has Verfremdung in the context of management education?* it has also surfaced other questions related to the research outcomes that need to be considered. One key observation has surfaced through my intense examination of MBA students. Because a large number of students voiced their expectations of receiving skills, models and universally applicable tools I believe that management students need to scrutinize their motivation for undertaking this degree. Skills and tools can be obtained in workshops or in organizational development programs. While informational learning is valuable, learners self-impede their learning potential for individual growth and development. I believe that transformational learning is as much the learner's responsibility as it should be the objective for education. However, another observation is that business schools also need to rethink the value they offer with MBA degrees. History has demonstrated that by focusing predominantly on the functional value of education they limit themselves to being instruments that actively contribute to organizational crises.

Based on Uncritical and Selective students' responses to the integration of *Verfremdung*, the key question I have found myself asking as a result of this research was how to help learners develop the openness that is necessary to engage with ambiguous problems. Integrating the humanities into business school curricula will certainly help – but only if the integrated subjects remain independent and do not become instrumentalized. If philosophy or literature become *scientificized* their value will be greatly reduced, and their impact will be as insubstantial as that of numerous arts-based teaching methods that resemble art only remotely.

APPENDICES

Appendix 1 – Illustration of Reflection



Appendix 2 – Course outline MGSM866 Managing Change

Appendix 2 (pages 157-169) removed from Open Access version as it may contain sensitive/confidential/copyright content.

Appendix 3 – Transcript of Inspirational Speech (Braveheart)

Appendix 3 (page 170) removed from Open Access version as it may contain copyright content.

Appendix 4 – Questionnaire

Questionnaire

Managing Change

This questionnaire is designed to help us get a better understanding of MBA student's perceptions on different aspects of leadership in a change management setting.

The survey contains two questionnaires. Each questionnaire should take a maximum of 10-15 minutes to complete.

Below you find some statements about change management tasks. Please rate how strongly you agree or disagree with each of the following statements by placing a check mark in the appropriate box.

| | | | | | | |
|----------------------|------------------------|----------------------|-----------|-------------------|---------------------|-------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Strongly disagree | Moderately disagree | Slightly disagree | Undecided | Slightly agree | Moderately agree | Strongly agree |

| | | | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| It is common sense that what is crucial in change is to tell people the purpose and provide clear instructions about what is required | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| When it comes to the crunch, a manager can do little more than be rational and responsible in working out what change activities have to be done, and allocate them accordingly | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Managing change is always efficient or inefficient – you either have the knowledge and techniques or you don't | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Below you find some leadership performance tasks, which you might come across in a change management situation. Please rate your degree of confidence with a number between 0 to 100, in multiples of 10. Please enter the first number which comes to your mind in the underlined space provided.

| | | | | | | | | | | |
|-----------|----|----|----|----|------------|----|----|----|----------------|-----|
| 0 | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 |
| Cannot | | | | | Moderately | | | | Highly certain | |
| do at all | | | | | can do | | | | can do | |

If you thought about your ability (RIGHT NOW) to deliberately use your body language, tone, and actions in a change management meeting to convey a sense of urgency, how certain are you about how often you can do so?

At least once per meeting _____

At least twice per meeting _____

At least four times per meeting _____

At least in six times per meetings _____

At least eight times per meeting _____

At least ten times per meeting _____

| | | | | | | | | | | |
|-----------|----|----|----|----|------------|----|----|----|----------------|-----|
| 0 | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 |
| Cannot | | | | | Moderately | | | | Highly certain | |
| do at all | | | | | can do | | | | can do | |

If you thought about your ability (RIGHT NOW) to lead a change project by communicating meaning and legitimacy of goals to your team, how certain are you about how many team members you will involve this way?

At least 1 member of my team _____

At least 2 members of my team _____

Initiating Critical Reflection

At least 3 members of my team _____

At least 4 members of my team _____

At least 5 members of my team _____

Every team member _____

| 0 | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 |
|------------------|----|----|----|----|-------------------|----|----|-----------------------|----|-----|
| Cannot do at all | | | | | Moderately can do | | | Highly certain can do | | |

If you thought about your ability (RIGHT NOW) to motivate and inspire your team during uncertain and confronting conditions, how certain are you about how many team members you will involve this way?

At least 1 member of my team _____

At least 2 members of my team _____

At least 3 members of my team _____

At least 4 members of my team _____

At least 5 members of my team _____

Every team member _____

Appendix 5 – Lecturer's Questions for Learning Journals

How did your approach change prior to the course?

What did you take away from this course? Why?

What did you leave behind? Why?

What will you do in the future to improve your change skills?

What are your questions upon reflection?

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