DEVELOPMENT OF THE ADULT LEARNERS’ MANAGEMENT PHILOSOPHY
THROUGH CRITICAL MANAGEMENT STUDIES COURSES

by

CATHERINE HEATHERMAN MONAGHAN

(Under the Direction of Ronald M. Cervero)

ABSTRACT

Adult education addresses many issues from a critical perspective in both content and pedagogy. Critical Management Studies (CMS) uses a critical perspective in management education questioning the underlying assumptions of power and privilege inherent in capitalism. The purpose of this qualitative case study was to understand how CMS courses affect adult learners’ management philosophy. The research questions guiding this study were: 1) how do CMS courses affect the adult learners’ management philosophy and 2) what factors in a CMS course contribute to the development of the adult learners’ management philosophy? The primary means of data collection were semi-structured interviews with eleven learners in two CMS courses in the United States and in the United Kingdom. Data were analyzed using the constant comparative method. The findings indicate that adult learners enter CMS classrooms with two different management philosophies: mainstream and critical. The course moved two participants to a more critical management philosophy. However, for most of the participants the course simultaneously reinforced their different, even opposing orientations at the same time. Two primary factors emerged in response to the second research question. One factor centered on the way participants linked their prior educational and life experiences to the course content,
using prior experience as a guide for the usefulness and validity of the course content. The second factor revealed the importance of the instructor and the role of discussion in the development of the adult learners’ management philosophy. The instructor’s ability to encourage the learners to develop their own beliefs about management was instrumental. The discussion was another important element in helping learners to engage with the course, providing them with other viewpoints that both challenged and affirmed their philosophies. The results of this study revealed that (a) a CMS course can impact the adult learners’ management philosophy in multiple ways within the same course, (b) the outcomes from a CMS course derive from the intersection of course content, course process, the instructor, and the learner’s prior experience and identity, and (c) there can be a contradiction between the use of course content and a pedagogical process in a CMS course.

INDEX WORDS: Adult education, Critical management studies, Management education, Critical pedagogy, Qualitative research, Learning, Management Philosophy, Training and development
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B.A., Shippensburg University of Pennsylvania, 1975

A Dissertation Submitted to the Graduate Faculty of The University of Georgia in Partial
Fulfillment of the Requirements for the Degree

DOCTOR OF PHILOSOPHY

ATHENS, GEORGIA

2004
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DEDICATION

This work is dedicated in loving memory to

Rosemary V. Monaghan

And

Robert D. Yuzsczak

My aunt Rosemary was also my Godmother and friend. She taught me the value of asking good questions until you found the heart of the matter. She modeled the important aspects of being a qualitative researcher long before I knew that qualitative research existed. She died just before I started this journey and her wisdom was missed as much as her memory is cherished.

Bob was a dear friend from Chicago whose lovingly supported my life journey with his understanding and listening heart. His pride in my accomplishments always fueled my humility. His passing during this process left a hole in my life that is filled with cherished memories.

Both of them left me one final gift. The use of their gift to fund my research, which involved traveling to England, was the best way that I could honor their memory and their unconditional love and faith in me. I will always be grateful for their final gifts.
ACKNOWLEDGEMENTS

I acknowledge with gratitude the support and guidance offered by my major professor and the members of my committee. Ron Cervero invited me to apply to the doctoral program as a means of pursuing my passion. As my major professor, he helped me navigate the journey, providing inspiration, insight, and valuable feedback along the way. His compassionate heart also helped me navigate some difficult times. Juanita Johnson-Bailey was a methodologist par excellence. Her guidance as I crafted my research design and analyzed my data helped me create important work in my field. My other committee members, Laura Bierema, Ann Buchholtz, and Bob Hill provided me with thoughtful and constructive feedback while stretching me to do my best. It was a pleasure to work with all of you.

I would like to thank each of my participants for sharing their experiences and insights with me. They provided me with new ways to think about adult education. The instructors who said yes to my requests to use their classroom as my research sites were also important to this project. It was a pleasure and a privilege to work with you.

A big thank you also goes to the community of learners in the department who shared their lives and laughter with me as we engaged in this often-monumental journey. You reminded me again and again that I could do it. I would especially like to thank Katie, Diane, Dougie, Janice, Tuere, Wei-Ting, JuSung, Letha, Bernadette, Linda, Judy, Gillian, and Joris. Other unsung heroes that lighted my path are Dave and Fred – it was so nice to know “normal” people in Athens and Denise Collins and Linda Chester, who always had time to talk and check that I had completed all the necessary paperwork on time.
Last, but not least, I would like to thank Brad Courtenay and his class on Spirituality which provided me with time each week to come up for air as I worked on my dissertation this spring. In addition, I would like to thank Margaret Holt for sharing her ideas, encouraging me in my work and on occasion for sharing food and friends with me.

Outside of the wonderful community I found here in Athens, my family and friends also supported me on this journey. I would like to say thank you to Mary Ann Fischer whose weekly phone calls, especially in the beginning sustained me. My brothers Brian, Sean, and Kevin and my cousins Paul and Ronnie also supported me with their love. And finally, my Aunt Jeanne McKenna, part of a long line of McKenna and Monaghan woman who not only thought about but acted from a Love that embraced social justice as a way of life and instilled in me the desire to do the same.

I would also like to thank my best friend Carl J. Ratner, who helped me to internalize what an intelligent and beautiful woman I am and Tom Valentine whose belief in my ability to be successful in this program when I first arrived gave me the confidence to finish.
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CHAPTER 1
INTRODUCTION

This dissertation is the result of my own personal journey toward incorporating a critical lens into management education. During my career as an accountant, I applied a critical perspective toward the business world but it was a narrow perspective. The application of this perspective was limited to a personal level that primarily included the current work environment that I was engaged in at that time. However, while I was teaching an accounting class at a small private college I experienced an epiphany that began to move me beyond the personal and out into the implications of a critical perspective for society and the possibilities for change. The following personal narrative describes my epiphany and the impetus for this study:

_I have been walking into this accounting classroom three times a week for the last five weeks. It is halfway through the quarter and I am explaining once again, another instance where the rules of accounting do not match the actual practice in the business world. As I stand there looking out at the learners, who are predominately African-American and Hispanic, it occurs to me that the “rules” they are learning in this business undergraduate program will not necessarily match their experiences in the real world. The rules of society I am thinking about say that anyone can have the American dream, if they just work hard enough, and a college degree is the key to their success. But the actual experience is that too many times employers would rather hire a White male, or a White female will do in a pinch, than hire an African-American or a Hispanic regardless of how well-qualified they are for the job. This is_
This epiphany helped me realize that learners need a way to view the world so they can begin to see for themselves the differences between the “theory” and the “practice” of their everyday world, especially in the world of business. As I engaged in my doctoral studies, I found that one way to do this is to engage the learners in discussions about capitalism from a critical theory perspective.

Background

“Economic literacy is dominated by the singularity of capitalist production, wage labor, and ‘the’ capitalist market” (Gibson-Graham, 2002, p. 38). The idea of capitalism and the free market is viewed as the basic premise of a successful economic system. Capitalism, as practiced today, is almost solely about increasing shareholder wealth. This is the ultimate end and increasingly any means used to achieve that end is considered not only necessary but “right.” Globalization has created alliances between powerful corporations and powerful governments backed by the power of money to create an economy where transnational corporations can freely move goods and money, without interference, in an effort to maximize shareholder wealth. In this scenario, technological advances and economic growth are the keys to solving the problems of society benefiting everyone (Finger & Asún, 2001; Korten, 2000). Meanwhile, as we engage in rampant consumerism to fuel the global economy, the gap between the haves and the have-nots is growing wider and the quality of life from the personal to the ecological is rapidly diminishing (Korten, 2000).

Capitalism is the cornerstone for management decisions made daily in large and small organizations. Providers of management education consider capitalism a defining and unifying
force as the primary economic system. Friga, Bettis, and Sullivan (2003) citing Merrill Lynch (2000), states that on an annual basis “corporations and education institutions spend a combined 2.2 trillion on management education and training worldwide” (p. 233). Management education, in striving to help learners become more successful in business, focuses on the business and management theories that are part of this capitalistic system (Engwall & Zamagni, 1998; Gibson-Graham, 1996). This education occurs in many settings. It occurs in formal settings such as corporate training seminars and institutions of higher education. In addition, it occurs in the workplace on an informal basis through mentoring relationships, on the job training, and even coffee break conversations. Management, and by extension management education, “is not the sole preserve of (predominately male) managers: subordinates, customers and citizens in general have a legitimate interest in management” (Alvesson & Willmott, 1992, p. 6). Management and organizational life in general has grown to encompass almost all areas of life – from what we buy to how we spend our time. “As the presumed centre of an increasingly large number of distinct activities and processes, management expands and its claims are correspondingly magnified. As this occurs it becomes increasingly vital to subject it to critical examination” (Alvesson & Willmott, 1992, p. 3).

The practice of management and management education is facing a crisis (Grey & French, 1996). It is no longer effective to focus only on teaching managers the mechanics of how to manage. Rapid change in the information age quickly makes this type of knowledge obsolete. One way to meet this challenge is to use a “managerialist” approach that teaches managers how to continually learn and develop a flexibility that will keep up with this change. However, the goal of management education from a “managerialist” approach is to teach managers to be more effective at problem solving (Grey & French, 1996; Reynolds, 1999a, 1999b).
Most forms of management education are currently guided by an instrumental form of rationality, which focuses primarily on efficiency and problem solving as it relates to enhancing shareholder wealth (Grey & French, 1996). Management education has shifted from concentrating on the “hard” skills, such as accounting and production, to more “soft” skills, such as communication and leadership. Furthermore, the focus within both the hard and soft skill area has shifted from a very technical how-to toward analysis and critical thinking. There are many ways to shift management education from skills or a prescriptive model to one that deals with analysis and other critical thinking aspects.

One way to shift management education from skills and towards critical examination is to apply Critical Theory to management education. While Critical Theory has a political base, it also encompasses the communication aspects, ideology, and legitimacy of management and the economy. Alvesson and Willmott (1992) note that over the last forty years there has been an increasing body of literature that “questions the wisdom of taking the neutrality or virtue of management as self-evident or unproblematical” (p. 1). They point out, however, that an analysis of management employing a critical theory lens has only become prevalent since the early 1990s. Using a critical lens to broaden the field of management studies is the essence of Critical Management Studies (CMS). Critical Management Studies is an approach to management that seeks to critique capitalism and the practices of management in terms of its power and privilege, as well as its social, moral, and political impact on society (Grey & Mitev, 1995).

Alvesson and Willmott (1992) define CMS as a discipline that “understands management as a political, cultural, and ideological phenomenon” (p. 8) as opposed to a more mainstream management philosophy which sees management as merely a technical function of the organization requiring skills in problem solving. CMS seeks to give “a voice to managers not
only as managers but as persons, and also to other social groups (subordinates, customers, clients, men and women, citizens in other capacities) whose lives are more or less directly affected by the activities and ideologies of management” (Alvesson & Willmott, 1992, p. 8).

Using a critical theory lens, it “seeks to encourage a questioning of taken-for-granted assumptions about contemporary social reality and the models for the satisfaction of human needs and wants that are so widely assumed in advanced capitalist society” (Alvesson & Willmott, 1992, p. 11).

To date, the literature addressing the importance of CMS to management education emphasizes using a critical theory lens as a necessary step both in teaching managers and prospective managers to talk about the underlying power and privilege that oppresses many marginalized groups, and as a vehicle for bringing about a more equitable economic system. CMS is a radical view of looking at organizations and the underlying systems. French and Grey (1996) point out that,

the fact that management is socially important means that it is vital that it be exposed to critical interrogation. In addition, since management education is such a significant arena for the reproduction of management, it follows that it is a primary site for such interrogation. (p. 2)

However, learners usually do not readily accept this challenge to the prevailing worldview (Reynolds, 1999b). Therefore, the consideration of learners and their interactions through the learning process to this challenge is a significant and necessary factor to the success of developing a learning intervention employing CMS to critique the principles of management and organizations.
Research Problem

An increase in scholarship has focused on the issues that arise in higher and adult education when courses are offered that address the ways that power and privilege manifest in our society. The majority of this scholarship about these courses addresses these issues in terms of race, class, and gender (Allen, Floyd-Thomas, & Gillman, 2001; Banning, 1999; Chan & Treacy, 1996; Davis, 1992; Day & Glick, 2000; Higginbotham, 1996; Johnson-Bailey & Cervero, 1998; Meacham, 1995; Tatum, 1992; Tisdell, Hanley, & Taylor, 2000). These courses are a “challenge to some students who find this material foreign, question its inclusion in the curriculum, and may be deeply disturbed by the implications it has for thinking about themselves” (Higginbotham, 1996, p. 203). Learner resistance is frequently encountered as learners react to these challenges (Davis, 1992). Learner resistance is not limited to the course content. For instance, it might be resistance to the positionality of the instructor (Johnson-Bailey & Cervero, 1998).

There appears to be considerable disagreement about how to treat learner resistance in the classroom. Some authors see resistance as something that needs to be overcome and that addressing learner behavior means helping the learners to change (Keeley, Shemberg, Cowell, & Zinnbauer, 1995). On the other end of the spectrum is the view that a certain amount of resistance is a sign of learner engagement with the topic and therefore a welcomed and necessary result of teaching about diversity in higher education (Chan & Treacy, 1996; Meacham, 1995). According to Chan and Treacy (1996), the educator is an important role model for learners who may be engaging in these issues for the first time.

A few studies have looked at learner reactions in terms of both learner engagement and resistance to these issues (Mazen, Jones, & Sergenian, 2000; Rigg & Trehan, 1999; Sharkey,
2000). The conclusion of these studies is that providing education that addresses societal power and privilege may foster positive outcomes such as personal growth or affirmation but in other cases may generate negative outcomes resulting in anxiety and disempowerment. Both Vince (1996) and Kumashiro (2002) state that it is important to deal with resistance and anxiety rather than focusing primarily on the rational and practical:

As Ellsworth (1992) tells us, the rationalist approach to consciousness-raising assumes that reason -- detached from and uninfluenced by other aspects of who we are -- can lead to understanding and change. But rational detachment is impossible: students’ identities, experiences, privileges, investments, and so forth always influence how they think and perceive, and what they know and choose not to know. (Kumashiro, 2002, p. 76)

This is important because the learning process can significantly facilitate or impede the capacity of the learner to engage in critical thinking about issues of power and privilege. A better understanding of this process will help adult educators to open up critical conversations with learners about the issues of power and privilege embedded in capitalism.

Statement of Problem

One of the purposes of CMS is to critically scrutinize managerial discourses and practices, thereby opening a dialogue about the power and privilege inherent in the system of capitalism. Some questions that CMS explores are: Whose voice is speaking loudly? Whose voice is silent or can barely be heard? Whose interests are served and whose interests should be served in the area of work and capitalism and its impact on the individual and society (Alvesson & Willmott, 1992, 2003)? The purpose of this dialogue is to enable learners to reflect critically on the underlying assumptions and values of society, and capitalism in particular, which ultimately influence their lives in significant ways. In addition, learners in management programs
are striving to become managers. As managers, they will use the decision-making power that accompanies these positions. Business is all-pervasive in our lives and the lives of our learners. Therefore, this area has the potential to reach learners in a very personal way and its use can extend beyond the borders of the business school.

The issues of power and privilege are part of every educational agenda whether acknowledged or not (Cale, 2001; Tisdell et al., 2000). These issues are also part of the process that learners use when they encounter a dialogue that critiques capitalism. Managers, as a professional group, exert considerable influence on many aspects of society (Alvesson & Willmott, 1992, 2003; Friga et al., 2003; Reynolds, 1999b). Therefore, understanding the learning process that occurs when learners incorporate the theories and ideas of the critiques of power and privilege within capitalism into their management philosophies has far-reaching consequences.

The literature addressing the use of CMS in management education has primarily focused on the need for critical content and/or critical pedagogy (Caproni & Arias, 1997; French & Grey, 1996; Nord & Jermier, 1992; Reynolds, 1999a, 1999b; Roberts, 1996; Thompson & McGivern, 1996). Yet, in spite of this focus on critique and inclusivity within content and pedagogy, empirical studies of the learning process have not been undertaken. Elliott (2003) explicitly acknowledges this gap, “Knowledge, and awareness of management education’s impact on management practitioners, remains taken from the viewpoint of educators. This reveals an ‘ex-cathedra’ approach in which educators are expert, including expert about how practitioners respond to management education” (p. 418). The problem addressed in this research sought to correct this lack of attention to the learning process occurring in CMS classrooms and its impact on the development of the adult learners’ management philosophy.
Purpose of the Study

The purpose of this study was to understand how CMS courses affect adult learners’ management philosophy. Questions that guided this study were:

1. How do CMS courses affect the adult learners’ management philosophy?
2. What factors in a CMS course contribute to the development of the adult learners’ management philosophy?

Significance of the Study

Findings of this study contribute to both the theory and practice of using critical content and pedagogy to open up dialogues around issues of power and privilege in adult education settings. It increases our understanding of the dynamics of the learning process that are important to adult learners. It also increases our knowledge about what the adult learner brings to the critical educational experience and outlines the possibilities for transformation that result when they critically reflect on organizational systems of power and privilege. This understanding, in turn, informs the practices of any adult educator who uses a critical approach in a learning environment. Specifically, it better prepares educators to more effectively use a CMS approach in management education classes.

If one accepts the premise that a critique of capitalism in management education is important to both individuals and society, then a thorough understanding of how this critique is incorporated into the learners’ worldview is important. A more effective use by educators of critical content and pedagogy helps learners as they struggle to critically reflect on the underlying structures that exist and come to recognize the need to examine these structures as the world of business becomes increasingly diverse and global. Finally, as managers, learners in management education settings use power to affect decisions that are a part of these positions.
By helping these managers to achieve a different vision of the world using CMS, we can also help to realize a society where the interests of everyone, including those currently marginalized, are at least seriously considered.
CHAPTER 2

REVIEW OF THE LITERATURE

The purpose of this study was to understand how CMS courses affect adult learners’ management philosophy. This review contains three major sections. The first provides background information about Critical Management Studies (CMS) and its guiding principles. The next section looks at the current debates in CMS that are germane to this study. The final section reviews the theoretical discussions and empirical studies that have been done about teaching and learning around issues of power and privilege. The discussion will center on how these areas are defined and used in the literature, the current focus of each area and how they relate to issues of course content and process in educational settings that examine power and privilege in a capitalist society.

Critical Management Studies: Background and Principles

In its September 11, 2000 cover story, “Too Much Corporate Power?” Business Week released survey results that found 72 percent of Americans believe corporations have too much power over too many aspects of American life. Seventy-three percent feel the top executives of U.S. companies are overpaid. Only 4 percent believe that America is best served when corporations pursue only one purpose -- making the most profit for the shareholders. Ninety-five percent believe corporations should sacrifice some profit for the sake of making things better for their workers and communities. (Korten, 2000, p. 6) This section addresses the background of the rise of CMS, the underlying assumptions, and the principles of the discipline. The basic underpinnings of CMS are: 1) management requires more
than technical skills, 2) management is a major structure within the system of capitalism, 3) the structure of capitalism and management is embedded with a great deal of power and privilege, and 4) capitalism has become all pervasive in Western society. “Corporate practices pervade modern life by providing personal identity, structuring time and experience, influencing education and knowledge production, and directing entertainment and news production” (Deetz, 1992a, p. 2).

Beginning in the 1970s, U.S. management was perceived as ineffective in the face of international, especially Japanese, competition (Locke, 1996). The effect of this was to split the role of management into two aspects. The bureaucratic (technical) aspect was viewed as ineffectual and the cause of corporate America’s inability to compete while the “manager” was portrayed in the popular literature “as a mythical figure requiring a rare blend of charismatic flair which cannot be routinized and codified in rules transferred to scientific training” (Fournier & Grey, 2000, p. 12). Then in the 1980s, the public sector, especially education, government, and social work became the focus of managerialization. A managerial focus assumes that all business problems are solvable with the application of “good” management techniques and theories. This concept, once reserved for use in for-profit companies has expanded to encompass the non-profit and public sector. Managers are perceived as possessing some special insight and privileged knowledge of the real world that qualifies them to expound upon and therefore, provide solutions for a broad range of issues (Fournier & Grey, 2000).

Over the last two decades, society has looked increasingly to the business paradigm to solve its problems. This is evident in the move to privatize more and more government functions, including education. The business paradigm is client centered and profit driven; it assumes that the market is the best judge of quality and the best distributor of resources. “Corporate organizations
serve as a polity. In modern societies they make most public decisions on the use of resources, the development of technologies, the products available and the working relations among people” (Deetz, 1992b, p. 21). If the business paradigm is going to be used for the solutions of social issues then it becomes imperative that management education addresses issues of power, privilege, and social justice in order to counteract the systems of capitalism that privileges some and disadvantages others (Alvesson & Willmott, 1992, 2003; Fournier & Grey, 2000; French & Grey, 1996).

Fournier and Grey (2000) assert that these changing views and roles of management in the 1970s prompted scholars such as Clegg and Dunkerley (1977), to explore and problematize the growing power of management. These scholars noted that a problem existed in management education because important issues, such as capitalist development, power, and sexism were not part of the discourse in most texts on organizations. It is because capitalism is such a defining and unifying force that management education has focused on the realm of capitalism as the primary economic system that learners need to know (Engwall & Zamagni, 1998; Gibson-Graham, 1996).

Management education as a formal course of study began to develop, in the United States, during the middle of the 19th century. By 1936, there were 180 business schools and by the early 1970s, the majority of the 2,500 U. S. institutes of higher education offered business education (Engwall & Zamagni, 1998). After the Second World War, business education reform, spurred by a report on the state of American business education (Gordon & Howell, 1959), “enabled American institutions of higher education to become, twenty years after the war, centres of research and teaching in scientific management, wherein the scientific treatment of
management itself held pride of place” (Locke, 1998, p. 151). In contrast, in the UK there were no business schools before the 1960s (Whitley, Thomas, & Marceau, 1981).

Engwall and Zamagni (1998) outline a number of teaching methods that became prominent in U. S. business schools with the implementation of these reforms. Harvard Business School applied the case method to business education. It was thought that using cases from actual companies would prepare MBA learners for management positions. The main alternative was to focus on teaching learners specific management techniques. In particular, there was a strong emphasis on the use of quantitative methods. This alternative came into favor in the era of “operations research” in the 1960s and 1970s and continues to the present.

According to Grey and French (1996), management and management education is facing a crisis. Most management education focuses on problem solving and efficiency as the means of helping corporations increase shareholder wealth (Grey & French, 1996). However, rapid change in the information age quickly makes knowledge centered on the mechanics of managing obsolete. The use of a “managerialist” approach, which focuses on teaching managers how to continually learn and develop flexible skills, has been utilized as one way to meet this crisis. This approach centers on the goal of teaching managers how to be more effective in the practice of management and as such, it is the primary aim of management education (Grey & French, 1996; Reynolds, 1999a, 1999b). In the course of teaching managers to be more effective, management education has shifted from a primarily “how-to” approach toward one that includes analysis and critical thinking approaches. Another school of thought, however, encourages the application of a critical theory lens to management education.

Over the last 40 years, there has been an increasing body of literature that views “management as a social phenomenon meriting serious critical examination” (Alvesson &
Willmott, 1992, p. 1). A 1985 conference, Critical Perspectives in Organizational Analysis at Baruch College in New York, was the site of the initial exploration about a more formal conception of what we now call CMS. However, it was not until the 1990s, with the publication of Alvesson and Willmott’s (1992) book Critical Management Studies that an attempt was made to discuss and unify the concepts in this field, which stressed a critical analysis of management (Fournier & Grey, 2000). Alvesson and Willmott (1992) sought to contribute to a “rapidly expanding body of knowledge that questions the wisdom of taking the neutrality or virtue of management as self-evident or unproblematic” (p. 1).

Gibson-Graham (1996) present an extensive critique of political economy and capitalism in particular:

“Capitalism” occupies a special and privileged place in the language of social representation. References to “capitalist society” are a commonplace of left and even mainstream social description, as are references – to the market, to the global economy, to postindustrial society – in which an unnamed capitalism is implicitly invoked as the defining and unifying moment of a complex economic and social formation. (p. 1)

As Gibson-Graham (1996) point out not only is capitalism an elusive term but it has grown to encompass almost any type of economic activity. “Capitalism in itself [is] triumphant, encompassing, penetrating, expansive (and so on), but by virtue of these ‘internal’ capitalist qualities, other forms of economy are vanquished, marginalize, violated, restricted” (p. 6). In modern society, capitalism is seen as the ultimate form of a mature and developed economy as opposed to other less-developed forms of economic activity represented by the economies of less-developed nations (Korten, 2000). Furthermore,
when capitalism is represented as one among many forms of economy…its hegemony must be theorized rather than presupposed. Economic sites that have usually been seen as homogeneously capitalist may be re-envisioned as sites of economic difference, where a variety of capitalist and noncapitalist class processes interact. (Gibson-Graham, 1996, p. 18)

It is at these sites of economic difference that a critical theories approach to management education begins.

CMS has its roots in the Frankfort School of Critical Theory, especially Habermas’s (1987) theory of Communicative Action. It problematizes the notion that capitalism, organizations, and management are value-free and objective. In addition, CMS contends that the structures of power and privilege disempower and marginalize the majority of the legitimate stakeholders of organizations. A number of events, including a CMS listserv begun in 1995, indicate that the field is growing.

A critical management track was added in 1996 to the British Academy of Management Conference. In 1998, the American Academy of Management Conference added a symposium and workshop on critical management education/studies. In 1999, the first Critical Management Studies Conference took place at Manchester University in England. Currently Lancaster University in England offers an M.Phil and PhD in Critical Management, and the University of Central Florida offers a PhD in Accounting, with an emphasis on the application of critical theories to the field. In spite of these advances, Cavanaugh and Prasad (1996) note that a critical perspective is absent from the curriculum of most business schools, especially in the United States. The authors theorize that the primary component responsible for this lack of attention is
the gap between the application of a critical theories lens to management concepts and the actual practice of management.

At the heart of CMS is the realization that management is at the center of an expanding number of distinct activities and processes and that its claims continue to be magnified. Therefore, it is important to subject management to a critical examination (Alvesson & Willmott, 1992, 2003). It also rests on the assumption that human reason is an emancipatory force. In addition, this force is changeable even when distorted and constrained by historical conditions (Alvesson & Willmott, 1996).

Alvesson and Willmott (1992, 2003) provide an overview of how Critical Theory can inform organizational practices. They focus on the relevance of using Critical Theory as a way of analyzing various management disciplines, as well as exploring the use of the emancipatory nature of Critical Theory to advance both management theory and actual practice. The theory of CMS is based on three key assumptions: 1) the influence of management and the concept that management techniques can solve both business and social problems is all pervasive and affects our lives as consumers, employees, and citizens; 2) “mainstream” management and theory is limiting and oppressive while failing to account for the socio-political aspects that are the true foundation of organizations and society; and 3) not only managers but “subordinates, customers, and citizens have a legitimate interest in management” (Alvesson & Willmott, 1992, p. 6). The purpose of CMS is to foreground “the processes of power and ideology subsumed within the social fabric of institutional structures, procedures and practices” (Reynolds, 1999b, p. 173).

The first principle of CMS is to use a critical theory lens to broaden the field of management studies. The practice of management and organizational life in general has grown to encompass almost all areas of life – from what we buy to how we spend our time. It is important,
therefore, to subject the field of management to critique. The second principle concerns the assumption that “mainstream” management’s theory and practice is oppressive and limited. “Mainstream” management focuses on the technical and means-ends approach to problem solving as important tools for a successful organization. CMS, on the other hand, focuses on the socio-political aspects of organizations. It is the power and privilege inherent in these aspects, as well as their relatively invisible nature that make them the subjects of critique. According to Alvesson and Willmott, (1992, 2003), “mainstream” management normally focuses on aspects of power that are explicit, observable, and superficial. These struggles are present in the efforts of owners and managers to exercise more control over the work environment and their employees, in the efforts of employees to circumvent these efforts at control, or even in the efforts of ordinary citizens for control, for instance, in the struggles over the environment. At stake, is the ability of managers to solve these issues of power and control. CMS contests the premise that ideas such as consensus and team building automatically give employees and other stakeholders more power in the decisions that are made.

The third principle of CMS strives to work toward an emancipatory ideal. It incorporates the ideal of “the realization of a more just society based on fairness and democracy” (Reynolds, 1999b, p. 173). The goal is to extend the ideal of democracy from the political to the economic sphere. Alvesson and Willmott (1992, 2003) assert that this can occur because of greater participation in decision-making by all the stakeholders and by making managers and organizations more widely accountable. Specifically, CMS contends that power and privilege have the greatest significance in those domains where they are invisible and rest on taken-for-granted assumptions:
A critical agenda for management studies requires that its functions and processes be examined in a critical light...[considering both] means-ends relationships [along with] institutionalized conditions of management discourse and practice. Issues of power and ideology are to be taken seriously – a move that pays attention to various interest groups and perspectives that are under-represented or silenced in mainstream writings and in corporate talk and decision-making. (Alvesson & Willmott, 1992, p. 8)

CMS challenges the myth of objectivity and technical knowledge that forms much of the basis for most management theory and practice. While realizing that technical functions are a necessary part of the productive activity of an organization, the socio-political phenomenon that underlies these technical functions is the focus of CMS. Alvesson and Willmott (1992, 2003) point out that CMS is concerned with who occupies the positions of authority within these technical functions and their resultant divisions of labor. In addition, it is also concerned with who derives the greatest advantage, in both material and symbolic terms from these divisions.

It contests the notion that only managers and organizations have a legitimate interest in how organizations function. The globalization of corporations has been identified as a phenomenon that is driving a larger and larger wedge between the haves and the have-nots while at the same time corporations are moving further and further away from restraints on their power (Finger & Asún, 2001; Korten, 2000). “As corporations gain in autonomous institutional power and become more detached from people and places, the human interest and the corporate interest increasingly diverge” (Korten, 2000, p. 80). The purpose of critical managerial discourse and practice is to carefully scrutinize and bring into the open the disparity between those voices who claim to speak on behalf of themselves and others, usually shareholders, and the reality that there
are other legitimate voices who are not allowed to engage in the discourse (Alvesson & Willmott, 1992, 2003).

One of the objectives of CMS is to expand the number of stakeholders who sit at the management table. Traditionally, owners and a select group of managers have set the direction and formulated a vision of how a company should operate in the world. In making these decisions, management often talks about the “market” and the idea of a “market-driven” economy as though there is actually some monolithic entity that forces organizations in specific directions that are beyond the control of any one particular individual or even a group of individuals (Finger & Asún, 2001; Korten, 2000). Under a positivist framework, these forces are seen as objective, rational, and capable of achieving the highest good. CMS calls this framework into question. It problematizes the notion that the owners and their representatives in combination with the “market” is the only way or even the best way to operate the economy (Korten, 2000). “A careful scrutiny of managerial discourse and practice in terms of voices that not only speak loudly, but also quietly or cannot yet be heard is an important task for Critical Management Studies” (Alvesson & Willmott, 2003, p. 13).

The argument pivots around whether the practice of management and the related discourse is just about solving problems, which are mainly of a technical nature, or is the practice and discourse actually a socio-political phenomenon. CMS, following in the footsteps of Critical Theory, perceives management and its practices as a socio-political phenomenon.

According to Fournier and Grey (2000), CMS differs from the traditional approach to management education in three important ways:

1. The focus of CMS is on analyzing the underlying assumptions of capitalism rather than on increasing job performance.
2. CMS seeks to “denaturalize” or deconstruct (Alvesson & Willmott, 1996) capitalism by taking a critical look at the realities that make up organizational life including the premise that hard science holds the truth. The assumption is that by “denaturalizing” capitalism we are able to truly construct organizational knowledge.

3. “CMS might be differentiated [from traditional approaches] in terms of the extent of its philosophical and methodological reflexivity” (Fournier & Grey, 2000, p. 9).

Critical Theory is not the only lens that provides an alternative to looking at “mainstream” management in the socio-political arena (Alvesson & Willmott, 1992, 2003). Both interpretive analysis and pluralistic theory have been used to account for the interests of other stakeholders and deal with the subjectivities that are a part of management practice. In fact, over the last decade the theoretical perspective of feminism, neo-Marxism, and poststructuralism, to name a few, have informed, expanded, and critiqued the notion of “mainstream” management, as well as CMS (Alvesson & Willmott, 1992, 2003; Fournier & Grey, 2000). Recently such approaches as queer theory and post-colonialism have had some, although a rather limited, influence on management studies (Alvesson & Willmott, 2003; Fournier & Grey, 2000). CMS provides an orientation to investigate the deep-seated aspects of these divergent stakeholders and the power relations at the structural level. It focuses on what is not articulated or even allowed to be articulated in addition to a focus and deconstruction of what is being said.

Alvesson and Willmott (1996) address the concepts of Critical Theory as compared to the use of a Poststructural analysis in management, particularly in terms of the concept of emancipation. “Mainstream” management education and practice has some weak emancipatory potential when it addresses issues of diversity and in striving to remove overtly degrading stereotypes as forces in the workplace. However, it appears that this emancipatory “means” is
viewed as a way to achieve the “end” of a more productive and profitable workforce. Hence, team building and consensus decision-making are valued without any concern for the underlying power dynamics that need to be explored if true emancipation is to be achieved (Alvesson & Willmott, 1996).

Those grounded in Critical Theory also challenge the rationality of existing ends and focus on other goals such as creativity, human freedom, and rational dialogue as a way to problematize and illuminate the current ends of capitalism with its existing power structure (Alvesson & Willmott, 1996). According to Fournier and Grey (2000), “the most ferocious arguments [in CMS] oppose a materialist understanding of power based on Marxist analysis, to a discursive understanding of power relations drawing upon postmodernism” (p. 20). Neo-Marxist postulate that postmodernism’s position of relativism lacks a political or critical focus because it denies that stories of exploitation are any more valid or critical than the stories promulgated by the oppressor. Postmodernists contend that the Marxist critique is flawed because it both misreads and reduces the postmodern notion of discourse to nothing more than language. Postmodernists assert that discourse involves both material and linguistic practices that need to be considered:

These various polemics, between neo-Marxists and postmodernists, between those seeking to reconcile epistemological relativism with some form of ethical commitment and those arguing for permanent critique, have had some important implications not only in articulating the different politics that CMS can engage in, but also in encouraging a greater degree of reflexivity in CMS writing. (Fournier & Grey, 2000, p. 21)
Critical Management Studies: Current Debates

There are number of current debates in CMS. One of the ongoing debates concerns the level of engagement or disengagement that CMS should have with actual organizations and management. Within this debate is the critique that its postmodern version is just a dialogue between intellectuals with no involvement in the real world (Fournier & Grey, 2000). Two ends of a continuum inform the use of CMS in the domain of management education. The first position is not one of “antimanagement” but attempts to work within the system to transform it. The other position represents a total disengagement with the practice of management. The focus is on changing the current system and not on working within it (Fournier & Grey, 2000).

Those who favor disengagement cite the potential to misuse the concepts of CMS for domination rather than for emancipation. “Throughout history, ideas and technologies promoted as vehicles to improve the human condition -- regardless of the philosophies on which they rest, the goals their developers envision, or substance – have been used by some people to dominate others” (Nord & Jermier, 1992, p. 213). This has always been the risk of emancipatory discourse.

Disengagement favors focusing on critiques of management rather than pragmatic application. Grey and French (1996) advocate the decoupling of education and management practice and want to shift the curriculum contents away from any focus on skills to only analysis and critique. They draw a parallel between political science education and politics. A person may engage in one without engaging in the other. Grey and French (1996) propose that, “the decoupling of management education and management practice implies more than a shift in the content of management education away from skills and towards analysis. It also implies a re-evaluation of the normative commitments of management education” (p. 6). They characterize
this as the “critical” work of management. Under this umbrella, they outline several distinctive ways of doing this critical work.

One way is to look at management through a political lens using some version of Marxism. Another is to use Critical Theory. Critical Theory, which has a political base, also expands to include the communication aspects, ideological, and legitimacy of management. Poststructural or postmodern approaches might also be used as a lens, as well as a Foucauldian viewpoint. These various approaches do not align themselves with any interest but “would suggest that the very notion of interests is a construction to be problematized” (Grey & French, 1996, p. 7). Feminism has also been used as a tool for looking at management from a critical perspective. Other critical ways of viewing management include environmentalism, neo-Weberianism, and psychoanalysis (Alvesson & Willmott, 1992, 2003; Fournier & Grey, 2000). As Grey and French (1996) point out, even Plato and other ancient traditions of thought, can be used as an interpretive source for management practice. Finally, they suggest that humanism, as a significant approach to the study of management, underlies all of these other critical approaches concluding that,

the knowledge base of management education, in terms of the research on management, is fragmented and disputed...There simply does not exist any agreement on what should be studied, or why, or how. This in itself suggests the need for plurality in the content of management education programmes...It might, therefore be more appropriate to suggest that management educators should always make clear to students the existence of different perspectives when problematic assumptions are drawn. (Grey & French, 1996, pp. 9-10)
Another issue that muddles this debate is “the theoretical pluralism of CMS leading to a lack of a unitary “critical” position (Fournier & Grey, 2000). This means there is no clear-cut way of differentiating between the critical and the non-critical. Within the field of CMS, the term critical generally implies the use of the concepts from the Frankfurt School (Alvesson & Willmott, 1992, 2003). Others, however, use this as a broader concept that has the capacity to encompass neo-Marxism, feminism, and poststructuralism (Fournier & Grey, 2000).

In summary, a challenge to using critical management studies in education is the debate surrounding the functional aim of management education. One side in this debate views management education as a means of increasing the economic goals of business while at the same time enhancing an individual’s career (Cavanaugh & Prasad, 1996; Engwall & Zamagni, 1998; Grey & French, 1996). The alternative view stresses the educative rather than the technical aspects. In this view, it is important to teach learners how to understand the activity of management. This understanding encompasses of view of management as political, moral, and social in nature rather than just learning to apply skills and techniques (Grey & French, 1996; Grey & Mitev, 1995; Roberts, 1996).

Every educational agenda contains implicit and explicit issues of power and privilege whether educators or learners acknowledge them or not (Cale, 2001; Tisdell et al., 2000). When learners encounter a dialogue that critiques capitalism, these issues are part of the learning process. Managers exert considerable influence on many aspects of society (Alvesson & Willmott, 1992, 2003; Reynolds, 1999a, 1999b). Therefore, understanding the learning process that occurs when learners incorporate the theories and ideas of the critiques of power and privilege within capitalism is important. Another debate in the area of CMS focuses on the issue of critical thinking and how to define it.
Critical Thinking in Adult Education/Management Education

A debate occurring in the critical management education literature (Fournier & Grey, 2000; Reynolds, 1999b) as well as in the adult education literature (Brookfield, 1987, 2000; Griffin, 1988) is the concept of critical thinking. Griffin (1988) explores the concept of critical thinking and critical theory in adult education. His conclusion is that the common conception of critical thinking is not based on social theory of any kind but rather on a psychological model in its construction of society. As Griffin (1988) explains, “according to the adult education usage, society is constructed as a value system rather than as a structure of social relations in economic and political terms” (p. 177). From his point of view, “adult education theory focuses much more upon issues of developing professional roles, and upon the instrumental rationality inherent in this particular task” (Griffin, 1988, p. 179) than on social issues.

In the CMS literature, Reynolds (1999b) discusses the use of critical thinking versus critical reflection in management education. Critical thinking generally signifies “a disciplined approach to problem solving…[while] critical reflection is seen as capable of challenging the unquestioned pursuit of economic expansion with its consequential inequalities in privilege” (Reynolds, 1999b, p.173). He also points out that “stripping reflection of any socio-political element weakens its capacity for analysis and redefinition while leaving a superficial impression that a more critical approach has been applied” (Reynolds, 1999b, p. 178). Similar to both Griffin’s (1988) and Reynolds’ (1999b) criticism, management education primarily incorporates critical thinking for the purpose of solving problems in order to help the individual manager to develop professionally rather than as a means of critiquing the underlying systems of power and privilege.
In reviewing the management education literature about critical thinking, the majority of the literature focuses on the development of critical thinking skills as opposed to the use of critical theory as a lens for learning about organizations and management. There appears to be a ladder extending from basic critical thinking skills to critical theory. The first rung of the ladder views critical thinking as just a basic skill of questioning: “the critical thinking model requires that students not only master the information, but also develop an understanding of the discipline, enough to think about (and question) the information” (McEwen, 1994, p. 99).

The next rung moves to the use of critical reasoning as a tool for analysis of diversity issues. Day and Glick (2000) discuss the use of diversity courses as a vehicle for developing an “awareness of individual differences, working effectively together, balancing special needs of workers, managing conflict, and communication” (p. 342). Their study dealt with the disconnect between what is taught in higher education and what human resource managers say their employees need in dealing with issues of diversity. They concluded, “the answer to teaching diversity skills may lie in equipping students with adequate resources to reason critically and to analyze situations from a variety of perspectives” (Day & Glick, 2000, p. 351). Although they emphasized that issues of society and culture and the exploration of power at various institutional and system levels can be a part of the discussion of diversity, especially within academia, the main focus is on critical reasoning as a tool for analysis and working in cohesive groups.

The third rung of the ladder uses paradoxical methods to simulate real world scenarios. Gallos (1997) contends that an effective management curriculum needs to include paradoxical methods to fully explore all the contradictions inherent in learning about diversity. Lewis and Dehler (2000) explore “learning through paradox” as a way of enhancing employees’ ability to function in an ever diverse and competitive environment. By using paradoxes in the classroom,
educators can simulate the reality and complexities of organizational settings and help learners
develop the capacity for a deeper understanding of the contradictions inherent in business as well
as understanding the defenses and potential paralysis that may arise because of these
contradictions. Vince (1996) in critiquing the use of experiential management education
emphasizes that “the content of all programmes of management education is affected by power
and equality, since all management is undertaken within the context of organizations that
replicate the social systems around them” (p. 128). However, a majority of management and
corporate training settings use the concept of experiential learning without addressing any
attention to the underlying power dynamics.

The final rung is “critical” as previously defined by Griffin (1988) and Reynolds (1999b)
focusing on an analysis of the underlying issues of power and privilege. Humphries and Dyer
(2001) value critical reflection as a means of engaging management learners “in critical theory as
an approach to learning that encourages asking challenging questions of our organizations and
ourselves” (p. 325). However, they are using the term critical theory when what they are really
talking about is critical thinking on the problem solving level. On the other hand, CMS is based
on critical social theories, such as Critical Theory, especially Habermas’s approach to
emancipation (Alvesson & Willmott, 1992, 2003). This political social aspect is the crucial
component that separates CMS from critical thinking as problem solving.

In all of this discussion about developing critical thinking skills in management
education from the first to the last rung of the ladder the issue of how learners incorporate
this critique into their management philosophy and practice is loudly absent (Elliott,
2003). Mingers’ (2000) study is an assessment of a course developed at the Warwick
Business School. The purpose of the course was to help the learners develop a “critical approach to management.” One of his conclusions is:

the unthinking acceptance of the course objectives is a sign that, at a deeper level, the course was not wholly successful. There were many fundamental issues that could have been raised – about the nature of the course; the underlying rationale; the views of the stakeholders…the potentially contradictory nature of the course itself (authority ordering them to question authority)…That none of the students chose to do this or, perhaps worse, either did not feel they were allowed to, or even did not conceive of doing it, is testimony to the difficulty of fostering a genuinely critical attitude. (p. 233)

Cavanaugh and Prasad (1996) propose that the purpose of critical management education should be to equip learners to form their own judgments and make their own connections to real-life issues. They propose critically examining the concepts of authorship and knowledge. Learner critiques of the management literature should focus on the context, power relations, and whether or not the literature is implementation-friendly. While these concepts do involve some critical thought, it appears to be superficial. This literature represents an example of the debate in CMS on engagement/disengagement, as well as what might count as critical. However, as Cavanaugh and Prasad (1996) point out a critical perspective is absent from the curriculum of most business schools. This has occurred in spite of the fact that, in the last decade, a number of authors have begun to seriously address the issue and the need for applying critical theories to the study of business (for instance, Alvesson & Willmott, 1992, 2003; Cavanaugh, 2000; French & Grey, 1996; Mingers, 2000).
Another debate centers on the notion of the use of critical content versus critical pedagogy. Some proposals (Alvesson & Willmott, 1992, 2003; Burgoyne & Reynolds, 1997; French & Grey, 1996) focus on the curriculum and the critical perspective that should be included while others (Prasad & Caproni, 1997; Reynolds, 1997, 1999a, 1999b) focus on the use of critical pedagogy as the best instrument for actually articulating critical management concepts.

Grey, Knights, and Willmott (1996) focus on their learners’ experiences of managing and being managed, of being privileged or underprivileged within situations of inequality. They propose that these experiences can be used as fodder for thinking critically about management. Their one nod to critical pedagogy is to ask the learners for input about the “construction or at least modification, of the content of the lectures” (Grey et al., 1996, p. 102). However, they barely address the issue that some problems might be the result of the hierarchical structures inherent in the current educational system. In fact, they contend,

> hierarchy is not in itself an insurmountable obstacle to creative and critical discourse. It is…the tendency for lecturers to hide behind it to avoid the threat of a student challenge to their ideas, that is a central problem in radical pedagogical reform. (Grey et al., 1996, p. 105)

Reynolds (1997, 1999a, 1999b) suggests that critical management education should employ both a focus on critical content and critical process. While Reynolds (1997) stresses the use of participatory methods, he cautions that an activity may appear to involve the participation of the learners, “yet its structure and theoretical framework may be in total control of the tutor or trainer” (p. 321). A critical process needs to include both facilitation of dialogue and the use of a social order that is non-hierarchical (Reynolds, 1997). Reynolds (1997) fails to account for the
fact that a non-hierarchical social order is an ideal and that a critical process needs to address and
deal with the tensions created by power structures, that as Foucault (1983) points out are always
present in society.

Rigg and Trehan (1999), in their qualitative study, “challenges the liberatory intentions of
critical management learning” (p. 265). Their criticism is that critical management learning
focuses on the individual and the use of “non-hierarchical learning communities” as a path to
societal transformation while it continues the current marginalization of some members of the
community by the dominant group. They argue that, “learning communities tend to be
normative, reinforcing values of consensus and collaboration” (Rigg & Trehan, 1999, p. 272).
The result is that power structures are not problematized and members of marginalized groups
continue to be disempowered. Their conclusion is that while the content of the course may be
“critical” the pedagogical practices maintain the status quo they purport to critique.

The challenge of CMS is similar to the challenges in adult education. It needs to focus
attention on the conditions and means that produce knowledge (Lather, 1994) through translating
principles into practice. This practice must move beyond the language of critique (Giroux &
McLaren, 1987) into practical methods that address the repressive myths of empowerment that
continue to reinforce relations of domination at the expense of the marginalized (Ellsworth,
1989).

Teaching and Learning about Power and Privilege

There has been an increase in scholarship focusing on the need in higher and adult
education to address the ways that power and privilege manifest in our society. Most of this
scholarship addresses these issues in terms of race, class, and gender (Chan & Treacy, 1996;
Davis, 1992; Day & Glick, 2000; Higginbotham, 1996; Johnson-Bailey & Cervero, 1998;
Meacham, 1995; Tatum, 1992; Tisdell et al., 2000). Along with this scholarly interest, many institutions of higher education have implemented policies that require their undergraduate learners to take at least one course addressing the issues of diversity (Higginbotham, 1996). In the beginning, most of these courses were treated as electives and therefore they tended to “draw more politicized students and those who feel strongly about ranking systems” (Davis, 1992, p. 232). With the increase in learners who are required to take diversity courses there has also been an increase in learner resistance. This material is a “challenge to some students who find this material foreign, question its inclusion in the curriculum, and may be deeply disturbed by the implications it has for thinking about themselves” (Higginbotham, 1996, p. 203).

Theoretical Discussions

Learner resistance in courses where the dialogue centers on discussing issues of power and privilege through the lens of diversity has been discussed in many fields including psychology (Tatum, 1992) and sociology (Davis, 1992). Primarily this resistance is analyzed in terms of negative behavior that needs to be addressed in the classroom. For instance, Davis (1992) categorizes this behavior as resistance, paralysis, and rage. Scholars talk in different ways about “managing resistance” (Keeley, et al., 1995), “preparation to avoid resistance” (Chan & Treacy, 1996), and “coping with student resistance” (Higginbotham, 1996).

There appears to be considerable disagreement about how learner resistance to discussing issues of power and privilege through a diversity lens should be treated in the classroom. Some authors see this as something that needs to be overcome and that addressing learner behavior means helping learners to change. Keeley et al. (1995), although addressing the issue of teaching critical thinking skills to learners rather than specifically about issues of race, class, and gender, says “that we cannot develop critical thinking in our students until we learn to recognize and
overcome students’ natural resistance to thinking critically, a process that requires considerable behavior change” (p. 140). Tatum (1992) talks about the concept of racial identity development theory and how this can be used in helping learners deal with their resistance. This theory looks at the psychological implications of being a member of a particular racial group. There is a separate model for Black racial identity development and one for White racial identity development. Her view is that awareness of this process can help the instructor to develop and use strategies to enable learners to integrate the content of the class into their own identities.

Banning (1999) discusses his experience teaching a popular culture class to predominately white learners and their reaction to the course. These reactions varied from being “disappointed that serious political questions are the focus of the course” to a lack of enthusiasm for discussing anything other than “the merits of heavy metal music.” He found that resistance is a common learner reaction. He states that the primary resistant stances of the learners about the material are: 1) “flamboyantly vitriolic,” 2) “racial inequity is not important…it does not affect them directly,” 3) “but what about white power” and, 4) “explicit discussions of race relations only…contributes to heightening racial tensions” (Banning, 1999, p. 7). He then discusses various ways for the educator to make sense of why the learners are resisting.

This article does not appear to have a clear conclusion. He states that learners resist and he provides an explanation for this resistance, such as the prevailing beliefs about the merits of color-blindness, meritocracy, and rugged individualism. However, he does not seem to provide any ways of countering these beliefs and helping learners to not only integrate the course content into their everyday life but also to help them plan for ways to actively pursue justice in their individual lives. From the author’s viewpoint, learners do not appear to want to deal with the tarnishment of the ideals of democracy and social justice that they believe are the foundations of
their way of life. The question that remains unanswered here is how can educators help learners “integrate” this new worldview presented in these types of classes into their current worldview.

Elissondo (2000) reflects on her experience of being a guest lecturer and “teaching one class of Cultural Studies to a group of white, middle-class, undergraduates enrolled in a traditional literature program at a small, Liberal Arts College…[using] a cultural literacy pedagogy to motivate learners to get involved in a critical reflection on the crossing of cultures” (pp. 133-134). Traditionally, in these types of courses, where the objective is to broaden a learner’s understanding of another culture, literature is deconstructed within a mentality of the individual text and characters. Occasionally, it is deconstructed within a broader social context and political struggle. The author attempted to use Disney cartoons from Chile during the 1970s to move learners from the individual to the political. Overall, the learners resisted this attempt and interpretation. She concludes that,

the two most important lessons I learned from that encounter were, first, that obviously my students and I position ourselves in relation to reality in very different ways and, second, that I need to better understand their imaginary if I want to insist on the incorporation of cultural studies to their Spanish curricula. (Elissondo, 2000, p. 146)

Although this was only an N of 1 and a reflection piece, it presents a picture of the challenges facing educators who are attempting to motivate learners beyond their current cultural frameworks. An important insight is the acknowledgement that today’s learners have grown up in a cultural that prizes entertainment even in education. In addition, most entertainment is positioned as being very light-hearted “stuff” with no implicit or explicit political commentary or meaning. It appears that the learners’ perception was that there is no meaning outside of the personal and psychological; no context appears to exist for social or political struggle. Learners
“resisted a reading that went beyond the intrinsic meaning of the text as they refused to see behind the ‘innocent happy characters’ a hidden agenda of a multinational corporation that aimed at reproducing American worldviews” (Elissondo, 2000, p. 140).

This review of the resistance literature in higher education indicates that learner resistance is a common reaction in courses that focuses critically on various aspects of power and privilege in terms of race and gender. Most of the literature discusses how to “handle” this type of learner rather than on ways to help the learner engage with or integrate this critical material. The literature suggests that most learners are resistant to this type of learning. However, some scholars have suggested that there are various levels of resistance in diversity courses and that resistance may have a positive place in the learning process.

These scholars take the position that a certain amount of resistance is a sign of learner engagement in the topic and necessary in teaching about diversity in higher education (Chan & Tracey, 1996; Meacham, 1995) According to Chan and Tracey (1996), it is appropriate, then, that students not rush to accept these new ideas without considerable thought. Their questions and challenges back to the teacher suggest engagement with information that they find provocative and so should not be considered resistance to the course as long as these challenges are made in a spirit of open inquiry. (p. 213)

Meacham (1995) views this struggle to engage issues of race, class, and gender at a significant level, where there is meaningful dialogue without creating unnecessary conflict, to be paramount not only for the classroom environment but also for how we understand “the fundamental nature of dialogue and debate in a democratic society” (p. 24). The way that learners react to
discussions of race, class, and gender is seen as important in higher education as a way to prepare the learners to engage with society at large.

Chan and Treacy (1996) point out that the educator has a major role in the level and type of learner resistance that occurs in the classroom. This includes the ground rules that are established and the topics, as well as addressing racist and sexist remarks made by a learner. When a learner is engaging with these issues for the first time, the educator can act as an important role model.

**Empirical Studies in Adult and Higher Education**

There have been a number of empirical studies about power and privilege in adult and higher education. Within the adult education field Johnson-Bailey and Cervero (1998) examine the ways that power relations existing in the wider social context of the learners and educators are “played out in the teaching and learning dynamics of adult education classrooms” (p. 389). This is a qualitative comparative case study. “Data sources included student’s evaluations, teachers' observations, interviews with students, interviews with both teachers, and conversations with similarly situated faculty members” (Johnson-Bailey & Cervero, 1998, p. 389). Results were organized using Maher and Tetreault’s (1994) themes of mastery, voice, authority, and positionality. The concept of “mastery” refers to the learner’s understanding of the course content and the generation of individual or collaborative knowledge. They found that the power dynamics in the educational setting simultaneously hindered learning for some while empowering others. The concept of “voice” is also germane to my study. This refers to the learners’ “ability to speak and more importantly to their degree of comfort in speaking” (Johnson-Bailey & Cervero, 1998, p. 392). Johnson-Bailey and Cervero (1998) showed that learners revealed that the freedom to speak and express their opinions in class was a positive
experience. “Additionally, students were attentive to who spoke the most in class, especially when they felt it interfered with their right to voice” (Johnson-Bailey & Cervero, 1998, p. 393).

Another empirical study done by Brookfield (1994) uses life histories/autobiographies to look at the effects on adult learners when they learn to be critically reflective about their world. “The sample of experience represents the life histories of 311 adult educators, with 223 who are doctoral learners majoring in adult education, and 88 who have written autobiographical analyses of critical thinking episodes in one-credit seminars on developing critical thinking in adults” (Brookfield, 1994, p. 204). He found five significant themes that stood out for two reasons:

- First, they represent the experiential clusters that emerged with the greatest frequency and the greatest validity across the diverse contexts for practice represented by the adult educators concerned. Second, they contradict much of the inspirational rhetoric that surrounds discourse on critical reflection. (p. 205)

The five themes are: impostorship, cultural suicide, lost innocence, roadrunning, and community. Impostorship is a learner’s sense that they do not possess the talent or even have the right to think critically. Cultural suicide is a perceived risk that as they begin to think critically that they will be excluded from other cultures and areas of their lives. Learners also experience loss innocence when they realize that education will not provide them with concrete or absolute answers to their questions. Roadrunning is a process that occurs as learners push their current limits of critical thinking and then sometimes lose their footing in the process of integrating new ways of thinking into their worldview. Finally, Brookfield (1994) explains the value of a community of other learners and the support they provide to those who are struggling to think more critically. His conclusion is that we (as critical adult educators) need to be aware of this dark side of critical reflection, to alert our learners to this side of the coin, and to help them to
navigate this better. One way to do this might be to develop a better understanding of how learners integrate new critical worldviews into their existing worldviews and the problems they encounter.

A number of studies in higher education have tried to assess what type of learner interaction occurs in the classroom in situations that use both a non-critical, as well as critical content or pedagogy. In the 1970s, Sistrunk (1981) developed a quantitative instrument used to “provide a profile of classroom behaviors and verbalizations” (p. 4) during a lesson or activity. This instrument measures instructor and learner behavior separately. His focus around learner behavior is on indicators of learner engagement such as “clarifying, responding, inquiring, and additive,” and indicators of learner disengagement such as “disinterest, disruptive, irrelevant, and avoidance.”

Under this instrument, the following behaviors indicate that a learner engages or “approaches” the learning: A learner

1. asks a clarifying or elaborating question or makes such a statement.
2. offers a positive comment or makes a positive response to a question.
3. asks where more information can be obtained, or how to obtain more information.
4. responds positively to a question or statement made by another student, without going through the teacher. (Sistrunk, 1981, p. 6)

The following behaviors indicate that a learner is disengaged or “avoiding” learning: A learner

1. shows lack of interest by registering boredom.
2. shows lack of interest by attempts to disrupt the lesson.
3. changes the subject, makes an irrelevant comment, or asks an irrelevant question.
4. or several students, show reluctance to learn a concept, fact, skill, or attitude. (This may be pretending not to understand when in fact the student does understand. (Sistrunk, 1981, p. 7)

This instrument might be useful during classroom observations, however the measures are highly subjective. For instance, how can someone really tell if someone is bored based just on the body language without asking the learner what might be happening on an internal level. The “approaches” to learning also fail to account for a difference in belief or worldview between the instructor and the learner at the beginning of the course that might result in the learner exhibiting avoidance behavior. In addition, it does not account for a change in a learner’s worldview based on their participation or attendance in a critical course.

Sharkey (2000) used a qualitative research design to explore the struggles that emerged within a teacher inquiry project, which asked learners to write a critical literacy autobiography. For the inquiry project the following data were collected: 11 autobiographies, the written responses by other learners to the autobiographies, a transcript of one class discussion, the learner responses to the responses they received, notes from the instructor’s teaching journal, and interview transcripts from five learners.

One level of analysis “focused on the ways that the writers engaged in issues of race, class, and gender” (Sharkey, 2000, p. 10). At this level four general categories emerged: 1) no explicit naming of the issues, 2) naming it but stating that it had no effect on the learner’s life, 3) acknowledging that the issues affected literacy but no connection to the learner’s personal experience, and 4) “connecting the issue to one’s personal literacy development” (Sharkey, 2000, p. 11).
The second level of analysis concerned the learner’s experience of the assignment. While most learners found it to be a positive experience, they found that some aspects of the assignment “were more challenging and at times more disconcerting than others” (Sharkey, 2000, p. 12). Based on this observation by the learners, the second analysis specifically focused on the written responses by both the instructor and the learners to the autobiographies. The responses were categorized into seven broad themes: 1) affirmation, 2) a request for expansion, 3) questions/comments on teaching, 4) bonding with the writer, 5) paper as a product, 6) I learned something from this, and 7) challenging a viewpoint.

One could argue that the last two categories…do no warrant inclusion because of the infrequency [5.4% and 3.3% respectively] with which they occurred. I include them here because they were noticeably distinct from the other categories and they illustrate other possibilities for ways of responding to students’ writing. (Sharkey, 2000, p. 15)

The responses were then analyzed from a critical literacy perspective in order to reveal embedded ideologies that in turn question social and political implications. This analysis revealed that there were four distancing categories for how the learners responded to the autobiographies of their peers: 1) your world is too different, 2) wow, how come I didn’t know this, 3) I have nothing I want to say to you, and 4) Good job! What about music? The last response “Good job! What about music?” represented the learners desire to just agree in order to move on to another topic that was more comfortable as opposed to really thinking about the other learners autobiography. The author feels that the issue of distancing is important “because it contributes to maintaining hierarchies within the classroom” (Sharkey, 2000, p. 16). The instructor’s attempt to disrupt the “working consensus” also had implications with interaction and beliefs of the learners about “school scripts,” “idealized versions of childhood,” and the
“myth of homogeneity.” Although the author does not directly address the issue of the process by which the learner incorporates a critical perspective into their worldview, the seven themes and the distancing behavior may be important to understand the way that learners change their worldview.

A qualitative study by Allen et al. (2001) is based primarily on learner feedback on evaluations forms at mid-term and the end of the semester. The purpose was to analyze the content and process of an interdisciplinary team-taught course. The authors offer an overview of the course, including the make-up of the class in terms of gender and race. They begin by discussing the various forms of the learner’s xenophobia, including racism, homophobia, and sexism. They also outline the ways that they helped the learners deal with these issues. Based on the mid-term evaluations, however, they realized that learner reactions were overwhelmingly negative and resistant. They then decided that it was important to step back and begin again by using Simon’s (1992) pedagogy of “teaching to transform” in order to instill a desire for social justice. This pedagogy focuses on self-reflexivity, social analysis, and moral praxis. Finally the authors discuss four implications: “interdisciplinarity, the value of multiple perspectives”; “collaborative teaching, modeling complexity and reconstructing authority”; “keep your eyes on the prize, enacting social justice;” and “applying the lessons of collaborative teaching to solo teaching.” Their analysis of learner reactions centered on the resistance of learners and the how learners responded to the ways the educators dealt with this. There was no discussion of the positive reaction that any of the learners might have had with the course content or process or if some of the learners might have been able to integrate the worldview of the instructors into their own. In fact, their assumption was that initially all the learners resisted the task of thinking critically about the course content but as a result of the course “every [italics added] student
revealed that they grasped the concept of social justice in their responses at the end of the semester” (Allen, et al., 2001, p. 322). They did not discuss or seem to be aware of the possibility that the learners were not equally resistant at the beginning. They also implied that being able to define the concept of “social justice” is the same as being persuaded that they, as learners, should now act from a social justice consciousness.

Agbor-Baiyee (2002), conducted a qualitative study to examine learners’ perceptions of problem-based learning (PBL) in a medical science context. The participants consisted of four learners in the second year of the Master of Science in Medical Science Program. Data sources and analysis consisted of two written journal entries from the fifth and tenth week of the semester, and a questionnaire to collect learners’ perceptions about the course. He concluded that,

students perceived that case writing: (1) enhanced their understanding of the complexity of PBL; (2) is a time-intensive process requiring tolerance and collaboration between small group members; (3) is important to their professional development; (4) enabled them to know each other in ways they had not hitherto appreciated; and (5) promoted their skill at networking with faculty and physicians. (Agbor-Baiyee, 2002, p. 3) Previous studies had shown that learners had positive experiences towards PBL while this study showed the learners both benefited from and were frustrated by the experience. “The use of self-reports limited this study. The participants in the study reported what they felt they learned…and not necessarily how well they learned” (Agbor-Baiyee, 2002, p. 5).

This review of the adult and higher education literature about responses to issues of power and privilege, both negative and positive, is an indication of the growing importance of the need to understand how learners respond in the classroom to critical content and pedagogy. It
illustrates that various combinations of resistance and engagement occur as learners are exposed to a more critical reading of the subject and their worldviews. Understanding the process of how learners actually incorporate these critical studies to form a different worldview that influences not only their thinking but also subsequently their actions is an important gap that has not been addressed in either adult or higher education.

*Theoretical and Empirical Studies in Critical Management Studies*

The need to address how the learner integrates critical content or pedagogy has been raised by Reynolds (1999b) in the CMS literature and Brookfield (1994) in adult education literature. Reynolds (1999b) provided “a theoretical review of the more problematical aspects of introducing a critical perspective into the practice and content of management education” (p. 171). He discusses a typology of content, process, and alternative pedagogies that might be used in a CMS classroom. He suggests some pitfalls of using a critical pedagogy that he characterizes as resistance and assimilation. He also considers the potentially disruptive consequences for learners when a critical content or pedagogy is used. He contends that

> the potential for disturbance of some kind is a possibility all management teachers should consider if they are encouraging critical reflectivity – regardless of the methods used.…. The responsibilities of a management educator should include being alert to the possibilities of troublesome – if ultimately welcome – consequences. (Reynolds, 1999b, p. 182)

Along with Brookfield (1994), he questions the view that using critical reflection and pedagogy in a classroom is unproblematic. Reynolds (1999b) suggests that it is important to examine the effects of using a CMS perspective in the classroom. Some authors have begun this exploration.
Critical course content.

Nord and Jermier (1992) present an analysis of the use of Critical Social Science (CSS) in management programs. They cite two sources of information used in this analysis: 1) academic treatments and 2) their experiences teaching it to managers. They note however, that this experience is limited in terms of number of classes and scope. They discuss the resistance, acceptance, use, and misuse of CSS by managers both as it applies in a business setting, as well as, in the MBA classroom. Their basic conclusion is that generally, managers resist or accept CSS theory based on how it applies to them personally. They point out that managers lie along a continuum in terms of their willingness to engage in a critical analysis of management.

In another theoretical article, Caproni and Arias (1997) discuss the need for the use of critical content in a management skills course and present one alternative to use in designing a course syllabus and readings. They argue that the integration of critical theory into the managerial skills classroom is necessary in order to enhance management education and practice in our increasingly diverse society. They articulate the need to open up a discussion and generate reflection about management skills training and the possibilities that critical theory can bring to both education and practice. Their application of a critical perspective involves using “two broad categories of conceptual skills: self-reflexivity and cultural critique” (Caproni & Arias, 1997, p. 295).

They distinguish self-reflexivity from self-awareness. The distinction lies in promoting a “cultural perspective toward self-awareness” (Caproni & Arias, 1997, p. 296). This cultural perspective entails a number of dimensions: 1) looking at various conceptions of self, others, and relationships across cultures; 2) exploring how these various conceptions are characterized across cultures especially in terms of strengths and weaknesses as well as whether it is viewed as
an individualistic or a group attribute; 3) discussing the source and ultimate targets of power and influence across cultures; and 4) incorporating a fundamental assumption of cultural perspectives which recognizes that there is a great deal of diversity in the overall characteristics and worldview that operate within cultures. The point of self-reflexivity is to enable managers to see the boundaries of their own worldview while at the same time appreciating the advantages and perspectives of other worldviews. According to the authors, this will help managers “to develop work relationships based on understanding, trust, and respect with a wide variety of people within and across nations” (Caproni & Arias, 1997, p. 298).

They also advocate using cultural critique to problematize the assumptions of management skills training which emphasizes personal management competencies such as communication, using personal power, managing meetings, and subordinates. “Cultural critique complicates the meanings of the competencies currently promoted as essential managerial skills” (Caproni & Arias, 1997, p. 298). This might include the questioning of the conventional norms for career development in an era of “rightsizing.”

In order to incorporate these two aspects of self-reflexivity and cultural critique into a management skills course they propose that educators “complement existing managerial skills texts with readings, discussions, and exercises that help students develop a critical perspective” (Caproni & Arias, 1997, p. 300). They provide a word of caution that integrating critical theory into management skills training will present some challenges, the least of which is that students and employers have come to prefer the existing focus on specifically teaching personal skills that will enable a manager to perform better. They propose that the challenge before us is that the world of business is changing and that there are individual and societal factors that are not currently being addressed in a “mainstream” management skills course. Therefore, as educators
we need to continually ask if what we are teaching is serving the individual, organizations, and society. They do not discuss the need to use a critical pedagogy to present the critical content. In addition, their educational goal is to integrate critical theory into the managerial skills classroom. This supports the belief that there are skills that can be taught to help a manager succeed in the conventional sense of the word, rather than question the whole notion of managerial success measured as “maximizing shareholder profit.”

Critical process.

Vince (1996) focused on the issue of experiential learning in management education. From his perspective, experiential learning is all about practice and change. He further discusses his framework in terms of the influences of Bateson’s (1973) level of learning; Freire’s (1970) perspectives on learning and power; and insights gained from the use of the knowledge in psychodynamics of organizations. He draws on Revans’ (1983) model of action learning as the basis for experiential learning. However, Vince (1996) argues that these models “fall short of providing a way of integrating the emotional and political into experiential management education” (p. 119). From the author’s standpoint, these models also do “not openly consider the effects of emotional resistance to, or avoidance of, learning…Secondly, the rationality of the model does not make an analysis of power and oppression possible within learning” (Vince, 1996, p. 121). He talks about the resistance and anxiety generated by learning and the need for management educators to deal with this rather than just focusing on the rational and practical. He presents an alternative to Revans’ action learning cycle. This alternative starts with the learner’s anxiety but then the learner makes a decision that either promotes her/his learning or discourages her/his learning based on their reaction to the anxiety generated in a learning environment. He uses two examples from his own research to illustrate his points. He then provides us with a
“revised practice for experiential management education” (Vince, 1996, p. 126). He concludes that the educator must help the individual and/or group to 1) “work with emotions that are avoided,” 2) embrace rather than avoid the issues of “power and equality as ever present process issues” in both the learning environment and the group, and 3) to help the learner from falling into an “avoidance of the complex underlying dynamics of working groups” (Vince, 1996, p. 130). While this is a good start in looking at the role of resistance and anxiety in experiential learning, he does not provide any information or insight as to how learners actually integrate the critiques of capitalism into their own worldview. A point that might be raised is what integration, if any, occurs. Perhaps learners enter and leave a course unchanged regardless of whether the course content affirms or challenges their prevailing worldview.

A CMS qualitative study (Mazen et al., 2000) based on the concept of action research also recognizes the negative and positive aspects of using experiential learning. They describe their experience of transforming their classes into learning organizations using Senge’s Learning Organization framework. The data collection source was the author’s collective inventory of learner weekly reflections. Reflections most representative of classroom experiences, as judged by the authors, were selected and used in the analysis.

The outcome of the analysis yielded two broad insights: 1) Senge’s five disciplines were more interrelated than the authors originally thought, and 2) the emotional component of learning was vital in transforming the class into a learning organization. While the authors do not talk about actual learner behavior or reactions in general, their findings show that the learners experienced a process of socialization about a new way of engaging in the learning process that involved both positive aspects (i.e., personal growth) and negative aspects (i.e., anxiety). The authors noted that the anxiety and vulnerability that accompanied it is important to the learning
process. “It was important that we reframe the vulnerability to acknowledge and manage change anxiety in the class” (Mazen et al., 2000, p. 155).

Cavanaugh (2000) also explores the use of critical theory in a business management classroom focusing on institutional inequality as opposed to individual racism. He states, “we (the privileged and underprivileged alike) are all complicit to some degree in the maintenance and perpetuation of unearned advantages and disadvantages” (Cavanaugh, 2000, p. 6). There is little, if any, discussion about learner reactions although he points out that “we are asking students not merely to process yet another piece of confirmatory data along the inductive path to truth (rubber stamping), but to throw a lifetime of self understanding into doubt” (Cavanaugh, 2000, p. 16). From the tone of the article, he indicates that his exercise, which focuses on looking at local hierarchies, using the election of the student council president, in terms of race, gender, and sexual orientation, produced from his learners an “ah-ha” about the invisible structure. There is an implicit assumption that the learners started out at the same point of unawareness about the invisible structure. There is also no discussion about the process that occurred for the learners to reach their “ah-ha” moment. He implies that it was a relatively civil process where the learners were presented with the correct lens to look at the situation and then reached the correct conclusions.

Critical content and process.

Grey et al. (1996) provide a wide-ranging discussion of the use of critical pedagogy in a management education context. Their findings are based on a case study of a senior level undergraduate course that has been offered for 20 years. In addition to explaining the rationale for using critical pedagogy and providing some actual examples of practice, they also discuss the limitations and problems encountered by both students and educators.
Part of the rationale for employing a critical pedagogical approach in a management education context is the current emphasis in management on the positivistic nature of knowledge. This translates into the use of the lecture format in a classroom to pass on these scientific truths to students with the corresponding assumption that learning is successful in relationship to the mastery of the material by the students. “Any questioning of those truths, except when posed in terms of relevant problems, is represented in conventional pedagogies, as a failure to understand the subject” (Grey et al., 1996, p. 97) or as the use of irrelevant material by the educator.

They briefly discuss three pedagogical approaches commonly used in management teaching. The first approach is the staff development approach, which attempts to assist management educators to move beyond the lecture format and add different ways of delivering course knowledge and communicating with students. This might entail the use of specific real world examples in order to increase student interest while persuading them of the relevance of the knowledge to their own careers. It might also include the use of various techniques such as role-playing and group projects based on the premise that students learn best through a process of engaging in simulated real-life situations. “This approach is underpinned by humanistic understandings of students as emotional actors who, as such require the construction of a certain psychological context for them to learn effectively” (Grey et al., 1996, p. 99). As the authors point out however, this approach focuses on using effective means to transmit management knowledge without any attempt to problematize the knowledge transmitted.

The second approach they discuss is the “discipline” approach. Here the focus rests on the assumption that there is a specific body of knowledge needed by the students in order for them to function in the business world. The students’ assignment here is to absorb the expertise of the teacher and master this knowledge. However, this approach can be valuable “in disciplines
where conventional epistemological and methodological assumptions are critically scrutinized” (Grey et al., 1996, p. 100) and in those instances, may be a genuine alternative to positivistic approaches.

The balance of the chapter focuses on the use of the critical approach in a management education context. In response to seeking to implement a critical approach to management, the authors developed an option for final-year undergraduate students. They discuss their use of critical pedagogy during the beginning weeks of the course. Their goal is “to involve students fully in the course by asking them to reflect continuously and critically on the relevance of the topic under discussion” (Grey et al., 1996, p. 101) especially as these topics apply to their everyday roles and experiences as consumers, students, and employees. This also means that the students are involved as much as possible in the ongoing construction of the course.

In using this approach they begin by attempting to establish discussion and debate as critical aspects of the course. They involve the students, asking them to consider the material from their own personal experience. Once that is established, they link it to academic concepts – such as Freire’s (1970) “banking concept of knowledge.” They attempt to facilitate “discussion and critique of the commonsense dualism of theory and practice...[paving] the way for developing new orientations toward knowledge which will be crucial for students’ ability to engage with subsequent development of the course” (Grey et al., 1996, p. 103). Although the starting point is an inward focus on the students’ experiences, there is a gradual movement outward to connect concepts and ideas to broader societal issues.

In their concluding discussion for this chapter, they illuminate the problems and limitations inherent in the use of a critical pedagogy for management. One problem is that the use of critical pedagogy in a management education context still represents, largely, the agenda
of the instructor. In spite of this, “critical pedagogy involves a redefinition both of what is to be learned and how learning is to proceed” (Grey et al., 1996, p. 109) even within the contradictions and ambiguities. Another important aspect concerns the students’ reactions, especially the anxiety experienced because of their encounter with a different pedagogical style and how the instructors dealt with that anxiety.

The findings presented are based on the educators’ perception of the course and its effect. Grey et al., (1996) comment on the learner’s perspective when they speculate “despite the obstacles, however, most students on the course do, we believe, develop a greater degree of critical (self-) reflection with respect to the subjects and objects of knowledge and education” (p. 102).

Roberts (1996) presents a theoretical piece that discusses the use of critical content alongside critical pedagogies in an MBA programme. After discussing the limitations of using a technical view of management practice in management education, he outlines the critical components of the MBA programme. For Roberts (1996), this critical slant is predicated on a number of new orientations about the educational process: 1) the need to focus on “the manager as self-conscious agent” (p. 66); 2) “action is shaped by the accumulated experience and understanding of a lifetime” (p. 67); and 3) individual learners bring “deeply engrained habits of thoughts, feeling and perception” (p. 67) to both the classroom and their management practices. In terms of pedagogical techniques Roberts (1996) argues for the use of experiential learning as “the way for students to explore their own experience of work more seriously”(p. 67) and to help learners think about “the illusion of omnipotent control [that] blinds students to the practical conditions and consequences of what they do” (p. 68). This discussion is similar to Caproni and Arias’s (1997) because in designing this programme he has retained the functional disciplines
and related analytical techniques of an instrumental management programme. However, he explains that the critical aspects of the course occur “in the framing and delivery of this content [where] we have attempted to make a number of innovations” (Roberts, 1996, p. 70).

These innovations are the use of an experiential learning model that “insists that students reflect first on how they ‘manage’ themselves in one-to-one relationships and in groups” (Roberts, 1996, p. 70). In the second year of the programme the focus moves to a critique of the professional views of management that exist, especially the literature on theories critiquing the control of staff employees. Two aspects of the course are worth noting because of their implication for the learning itself and the actual practice of management. Roberts (1996) characterizes classroom dialogue as “the legitimation of the personal voice against the seeming imperative of organizational need, [which] is intended to model the behavior and processes whereby institutional objectives might be moderated by individual ethical concerns” (p. 71). His assumption here is that there is nothing problematic in classroom dialogue and that rather than being a mirror of the power and privilege in society that it is actually a democratic dialogue that gives voice to everyone. Second, the course assignments necessitate that the students digest concepts in order to be able to use them to describe the organizations in which they work…and being asked to use concepts students are obliged to learn again what they thought about what they already knew. (Roberts, 1996, p. 72)

Although Roberts (1996) mentions the hierarchical nature of education and its emphasis on competitiveness and individualism, there is nothing in the course that suggests that these issues are addressed. The assignments are highly individualistic. These two aspects point out the need
for a critique of the use of critical pedagogies in the classroom. One study has been done to address these concerns.

Rigg and Trehan (1999) use a qualitative research design focusing on the experiences of six Black women in a critical management-learning program. It focuses on an individual’s experience of an entire program, as opposed to one class, and looks specifically at their experience of the Action Learning Set (ALS) component of the program. The authors use a framework of feminist pedagogy, anti-racist pedagogy, and social constructivism. The purpose of the research project was to “try to understand some of our observations of black women’s experiences, in order to better inform our approach as management development tutors” (Rigg & Trehan, 1999, p. 266). The authors explain that the experiences of the participants ranged from transformative, enlighten, and empowered to a “loss of confidence, and a reinforced sense of powerlessness” (Rigg & Trehan, 1999, p. 269). Based on these experiences, the authors critique critical management learning and within CMS the use of learning communities. They also discuss the language and concepts that are used as the center of critical management learning, specifically transformation, enlightenment, disempowerment, and emotions in learning. They conclude,

the concept of the learning community can be problematic, and has often been presented naively…Some of the experiences of black women demonstrate that critical processes in management learning are not necessarily empowering and can at times be disempowering, so deep are the interconnected consequences of racism and sexism. (Rigg & Trehan, 1999, p. 278)

Finally, they “highlight a need for facilitators to be reflexive about their own awareness and practice around race and gender issues” (Rigg & Trehan, 1999, p. 279).
Conclusion

These studies illustrate that there is both a need and a gap pertaining to the issues of the process that learners use to integrate the critiques of capitalism presented in a CMS course into their worldview. Elliott (2003) also discusses the lack of research about the impact of critical management education on the learner. She states, “until such empirical research comes to the fore CMS’s claim that it is challenging the mainstream managerialist authority must remain muted” (p. 424).

The dominant model of management education focusing on technology and the how-to of behaviorism is proving to be less effective in the current organizational landscape of the information age and a global economy. More than ever managers need the perspective and analytical tools that using a critical analysis approach to management can bring. In the current atmosphere of diversity and globalization, the application of critical theories to management provides an important lens. However, the very nature of critical theory with its focus on power, privilege, and the challenge to the underlying assumptions of capitalism is at odds with society. This challenge in the CMS classroom to learners’ notions of capitalism is at once necessary and threatening. Understanding the process of how learners incorporate this challenge and critique of capitalism into their management philosophy can inform our practices so that we can keep important channels of dialogue open. This in turn has the potential to bring about transformational learning that may in turn transform our society.
CHAPTER 3

METHODOLOGY

Numerous scholars and practitioners recognize the importance in management education of critiquing the issues of power and privilege inherent in capitalism (Alvesson & Willmott, 1992, 1996, 2003; French & Grey, 1996; Reynolds, 1997, 1999a, 1999b). Although there is a great deal of interest in Critical Management Studies (CMS), no empirical research has been conducted which explores the learning process that occurs in CMS classrooms and its impact on the learner. The purpose of this study was to understand how CMS courses affect adult learners’ management philosophy.

Two research questions guided this study: 1) How do CMS courses affect the adult learners’ management philosophy? and 2) what factors in a CMS course contribute to the development of the adult learners’ management philosophy? This chapter outlines the qualitative methodology used in this study. The various sections address the research design including sampling and selection criteria, data collection methods, analysis procedures, reliability and validity, and the researcher bias and limitations of this study.

Research Design

Qualitative researchers are interested in the interactions of individuals with their world and the way that individuals construct meaning and experiences from these interactions (Merriam, 1998). The researcher is searching for the meaning as perceived by the participant. However, a concern that must be taken into account is the role of the researcher’s own perceptions and interpretations of the participant's experiences. While “the researcher is the
primary instrument for data collection and analysis” (Merriam, 1998, p. 7), the goal is to capture and make sense of the participants’ experiences, not the researcher’s.

The result of the research is to provide thick, rich descriptions that illuminate the answers to the research questions (Merriam, 1998). This description should focus on the actual context, the participants, and the phenomenon under consideration. An analysis of the data involves finding themes, both common and contrasting, that aid in the conclusions drawn in order to answer the research question. “Typically, qualitative research findings are in the form of themes, categories, typologies, concepts, tentative hypothesis, even theory, which have been inductively derived from the data” (Merriam, 1998, p. 8). In addition, data from interviews with participants in the forms of direct quotations are used to support the findings (Merriam, 1998).

Achieving the purpose of this study required gaining an understanding of the interaction of the learner with the ideas posited in a CMS educational setting and how the learner comes to incorporate critiques of capitalism that are encountered in this setting into their management philosophy. Qualitative methods are particularly appropriate when the objective of the study is to access the individual’s subjective world (Bogdan & Biklen, 1998; Merriam, 1998; Patton, 2002). Due to a lack of knowledge about the phenomenon under study, the use of qualitative methods is appropriate for this study (Merriam, 1998).

Case Studies

A case study of individual learners in two CMS educational settings was used for this study. “In general, case studies are the preferred strategy when ‘how’ or ‘why’ questions are posed, when the investigator has little control over the events, and when the focus is on a contemporary phenomenon within some real-life context” (Yin, 1994, p. 1). The primary purpose of a case study is to gain an in-depth understanding of a particular context, situation, or
phenomenon, including the meaning and perceptions of the participants. The researcher is interested in the process of a specific context in order to discover meaning and make sense of individuals’ interactions with their world (Merriam, 1998). My research context was a critical management education experience. The purpose of this educational experience was to focus on a critique of capitalism, especially around the issues of power and privilege. The phenomenon of how learners incorporate critiques of capitalism into their management philosophy as a result of this educational experience was at the center of this study.

“Case studies are differentiated from other types of qualitative research in that they are intensive descriptions of a single unit or bounded system (Smith, 1978) such as an individual, program, event, group, intervention, or community” (Merriam, 1998, p. 19). The nature of the product is another distinguishable feature of the case study. “The case study results in an intensive, holistic description and analysis of the phenomenon or social unit being studied” (Merriam, 1998, p. 206). Yin (1994) adds that case studies rely on multiple sources for data collection that creates a need for a triangulation of the data and its analysis and “benefits from the prior development of theoretical propositions to guide data collection and analysis” (p. 13). According to Merriam (1998) the defining characteristic of case study research is the use of the case to delimit the object under investigation. This characteristic serves to place pre-defined boundaries around the investigation. “By concentrating on a single phenomenon or entity (the case), the researcher aims to uncover the interaction of significant factors characteristic of the phenomenon” (Merriam, 1998, p. 29). This method is also particularly useful in situations where it is extremely difficult to make a clear distinction between the context and the phenomenon (Yin, 1994).
Merriam and Simpson (2000), remind us that the use of data collection in a research study involves using techniques that will produce the best data possible. The approach used in this study was the case study method. The first criteria for selecting each site was that the course was taught in a business school at either the Masters or PhD level. The most important criterion was that the subject of the course was of a CMS nature focusing on critiques of capitalism. The individual cases were the learners and were bounded by the fact that the learners were: 1) engaged in an educational experience with the specific purpose of exposing learners to critical ideologies in the business context; and 2) involved in an educational experience occurring over a specific timeframe of one course.

Description of the Courses

One site located at a University in the United Kingdom will be referred to as UK University. The course at UK University was a required course in the MSc management degree program, offered during the 2003 spring term titled “Critical Perspectives on Management” with specific themes of anti-corporate protest and anti-capitalism. The course syllabus stated “this course will therefore try to provide an introduction to ‘anti-corporate’ and ‘anti-managerial’ movements, with a view to a deeper understanding of the reasons for the emergence of this current resistance to business and management.” The entire syllabus is included as Appendix A. This class consisted of 66 learners.

The course contains two distinct parts. Table 1 presents the topics that were covered. The first four weeks consisted of introductory lectures provided by the instructor. During the last five weeks, each student group did a presentation on an assigned book that was followed by a class discussion. In addition to the regular class meetings, each group was required to meet at least once with the instructor before giving their presentation.
Table 1.

Course Topics for the Critical Perspectives on Management Course

<table>
<thead>
<tr>
<th>Class</th>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture 1</td>
<td>Introduction (Module overview)</td>
<td>Instructor</td>
</tr>
<tr>
<td>Lecture 2</td>
<td>Historical introduction to conflict (History)</td>
<td>Instructor</td>
</tr>
<tr>
<td>Lecture 3</td>
<td>Power and hegemony (Theory)</td>
<td>Instructor</td>
</tr>
<tr>
<td>Lecture 4</td>
<td>The reality of representation (methodology)</td>
<td>Instructor</td>
</tr>
<tr>
<td>Seminar 1</td>
<td>The Bare Minimum</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Abrams (2002), <em>Below the breadline</em></td>
<td>Student Group 1</td>
</tr>
<tr>
<td></td>
<td>Ehrenreich (2002), <em>Nickel and dimed</em></td>
<td>Student Group 2</td>
</tr>
<tr>
<td>Seminar 2</td>
<td>Resistances</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Birchman &amp; Charlton (2001), <em>Anti-capitalism</em></td>
<td>Student Group 3</td>
</tr>
<tr>
<td></td>
<td>Klein (2002), <em>Fences and windows</em></td>
<td>Student Group 4</td>
</tr>
<tr>
<td>Seminar 3</td>
<td>Representing Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parker (2002), <em>Against management</em></td>
<td>Student Group 5</td>
</tr>
<tr>
<td></td>
<td>Gervais (2001 – 2002), <em>The office</em></td>
<td>Student Group 6</td>
</tr>
<tr>
<td>Seminar 4</td>
<td>You are what you eat</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Schlosser (2002), <em>Fast food nation</em></td>
<td>Student Group 7</td>
</tr>
<tr>
<td></td>
<td>Bové (2001), <em>The world is not for sale</em></td>
<td>Student Group 8</td>
</tr>
<tr>
<td>Seminar 5</td>
<td>Globalization and democracy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hertz (2001), <em>The silent takeover</em></td>
<td>Student Group 9</td>
</tr>
<tr>
<td></td>
<td>Stiglitz (2002), <em>Globalization and its discontents</em></td>
<td>Student Group 10</td>
</tr>
</tbody>
</table>
The second site located in the southeastern part of the United States will be referred to as Southeastern USA University. A PhD Seminar in “Critical Accounting and Accounting Information Systems (AIS)” was offered during the 2003 spring semester. Table 2 presents the topics covered. The entire course syllabus can be found in Appendix B. This course was also a required course in the Accounting PhD program. The purpose of the course as stated in the syllabus was to provide the learner with an “in depth understanding of the critical accounting and AIS literature and acquire the knowledge and skills necessary to undertake scholarly research in the area.” Each week one student would present a summary and critique of the assigned readings followed by class discussions of the material. This class consisted of four learners.

The design of using single educational sites was intended to enable a better understanding of the issues of how learners incorporate critiques of capitalism and the affect this had on their management philosophy. The existence of a common experience, the same learning environment, was an advantage that enhanced the analysis of the data across the learners, at least within each site. Another advantage was the value of using class observations as one way of triangulating the data. On the other hand, a disadvantage of relying on single sites was that the positionality of the learners affected how the learners choose to process this new information. For instance, all the participants at the UK site came from privileged backgrounds and had attended private schools, beginning at the high school level. This positionality did not allow me to understand how learners from a lower-socio economic background might have interacted with this worldview of anti-capitalism. Another disparity that was important was that the educational levels were slightly different for the two sites; the site in the UK was composed of master’s level students while the U.S. course is a PhD seminar. Finally, the learners from the US intend to teach in academe after they finish their degree while the U.K. learners will work in managerial
Table 2.

*Course Topics for the Seminar in Critical Accounting Course*

<table>
<thead>
<tr>
<th>Class</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction; Accounting as a critical social science</td>
</tr>
<tr>
<td>2</td>
<td>Critical social theory as a research domain</td>
</tr>
<tr>
<td>3</td>
<td>Postmodernism, a critique of critique</td>
</tr>
<tr>
<td>4</td>
<td>Postmodernism, continued</td>
</tr>
<tr>
<td>5</td>
<td>Accounting and the moral order</td>
</tr>
<tr>
<td>6</td>
<td>Enabling accounting: A way forward</td>
</tr>
<tr>
<td>7</td>
<td>Habermas’s critical theory of accounting</td>
</tr>
<tr>
<td>8</td>
<td>Midterm exam – evaluating critical accounting research</td>
</tr>
<tr>
<td>9</td>
<td>Evaluating critical IS/AIS research</td>
</tr>
<tr>
<td>10</td>
<td>Caterpillar controversy – Foucault and his critics</td>
</tr>
<tr>
<td>11</td>
<td>Spring break</td>
</tr>
<tr>
<td>12</td>
<td>Implementing critical accounting and AIS – An academic perspective</td>
</tr>
<tr>
<td>13</td>
<td>Implementing critical accounting and AIS – Association for Integrity in Accounting</td>
</tr>
<tr>
<td>14</td>
<td>Policy to praxis; Final draft of paper due</td>
</tr>
<tr>
<td>15</td>
<td>Working paper; Provide referee comments to authors</td>
</tr>
<tr>
<td>16</td>
<td>Final paper and presentations due</td>
</tr>
</tbody>
</table>
positions within organizations. These differences affected the comparison of individual learners across the sites.

*Purposeful sampling*

With purposeful sampling “cases for study (e.g. people, organizations, communities, cultures, events, critical incidents) are selected because they are ‘information rich’ and illuminative, that is they offer useful manifestations of the phenomenon of interest” (Patton, 2002, p. 40). The premise of qualitative research is that a small number of cases have the potential to generate a great deal of information. According to Silverman (2000), data are often comprised of a few cases and the selection will usually not be random. For the purpose of this study, eleven learners volunteered to be interviewed.

For this study, I used criterion sampling in order to review and study learners that met predetermined criteria of importance (Patton, 2002). Specifically, participants were selected who met the following criterion: 1) they were currently enrolled in an educational setting where CMS was one of the primary focuses of the class and 2) they were an adult learner between the ages of 25 and 65 taking courses in a business graduate program. The composition of the participants at UK University was three females and five males. They self-described their race and ethnicity as follows: four white British nationals, two Anglo-Indian British nationals, one Turkish national, and one Greek-American. The composition of the participants from Southeastern USA University was two females and one male, all of which were white Americans.

Very few instructors use a critical theory perspective in their graduate business classrooms. This meant that I was dealing with a small population and felt that a recommendation from others would be the best way to identify and select my sites. To gain entry, I relied on the professional relationships that I developed at the 2002 Academy of
Management Conference. I also posted an email to the CMS listserv. This listserv consists of 493 members.

Through the CMS listserv, I located the course at UK University. The course met from January 21, 2003 to March 18, 2003. A course syllabus is attached (Appendix A). I attended the last three classes on March 4, 11, and 18, as well as one small group meeting with a group of learners and the instructor for the purpose of planning the group’s presentation. While I was on-site, in addition to the observations, I interviewed eight learners.

Through my professional relationships, I located the research site at Southeastern USA University. This course met from January 6, 2003 to April 21, 2003. A course syllabus is attached (Appendix B). Again, I attended the last three classes of the semester on April 2, 9, and 16 in order to observe. During this time frame, I interviewed three of the learners. Four students participated in this class. Three students were PhD accounting students and one student was from the Management Information Systems (MIS) discipline.

Data Collection

Merriam and Simpson (2000) remind us that the use of data collection in a research study involves using techniques that will produce the best data possible. Two methods of data collection used for this study were: 1) semi-structured interviews, and 2) class observations. Using a combination of interviews and observations the researcher used these various data sources to validate and crosscheck findings. In this section, I will discuss the data collection techniques used to gather each type of data.

Potential instructors were contacted via e-mail in order to assess their interest. Further emails and phone conversations were conducted to discuss the research project. Once a research site was suggested, I contacted the instructor to ascertain that she/he was interested and willing to
let me use their course for my research. I then explained the purpose of this study, research questions, and the use of class observation and interviews for data collection. We also reviewed the consent form (Appendix C) and I answered any further questions they had about the study. In addition, we scheduled the actual date and time for class observations and the time frame for conducting the interviews. We also discussed the procedures used to solicit learner participation in the study. I allowed the learners to self-select to be a participant.

**Semi-structured Interviews**

The most important technique for my study was to conduct a semi-structured interview with each participant. The purpose of an interview is to help the researcher reconstruct events in which she did not directly participate; “we interview people to find out from them things that we cannot observe directly” (Patton, 2002, p. 340). We are unable to observe thoughts, intentions, feelings, and prior behaviors. “We cannot observe how people have organized the world and the meanings they attach to what goes on in the world…. The purpose of interviewing, then, is to allow us to enter into the other person’s perspective” (Patton, 2002, p. 341).

Using semi-structured interviews, I started with a well-developed set of questions as a guide for the interview (see Appendix D) but was flexible during the actual interview. The advantage of using a guide is that it insures that the interviewer has decided in advance how to best use the limited time available and “makes interviewing a number of different people more systematic and comprehensive by delimiting in advance the issues to be explored” (Patton, 2002, p. 343). However, within this guide the interviewer has the flexibility to explore, probe, and ask questions in an attempt to uncover the depth, detail, and nuances of unique situations (Patton, 2002). The interviews contained three sections. In the first section, I asked the participants to discuss the ethical positions surrounding a topic that had been discussed in a previous class.
UK University, this topic was the minimum wage and at Southeastern USA University, the topic was the issue of integrity and independence in the field of accounting. The topic of the minimum wage was selected because through conversations with both the instructor and the learners, I determined that this topic had generated the most engaging discussions in the class. The topic used at Southeastern USA University was selected in the same manner. In the second section of the interview, I asked the participants to describe a personal learning experience related to the CMS course. During the third section of the interview, the participants were asked to describe a personal management situation that involved some tough decisions on the part of the manager. For both the first and third part of the interview, I asked them to assess the topic or situation through the lens of a manager who used a critical perspective. In addition, I asked them to tell me how the course had influenced their own ethical decision-making. Each interview began by asking general background questions about why the participants were taking this particular course and studying for their particular degree.

The selection of the topic for the first question was based on (a) its relevance to the particular participants and (b) the assessment that most of the participants were well informed on the topic. With the participants from UK University, since most of them did not have a lot of previous work experience, the work experience they did have meant that most of them had worked at the minimum wage and so would have personal experience to draw from in framing the answers to the interview questions. In addition, it was the first group of presentations in the semester and as a result was the one best attended. Finally, the instructor felt that this discussion had been the one that had engaged the learners the most in the discussions.

Both the instructor and the researcher deemed the topic chosen for discussion during the interview with the Southeastern USA University participants to be an important issue in the field
of accounting and CMS. The issue chosen was the integrity of accountants. The participants, as former working accountants, were familiar with the topic and the concepts. In addition, the integrity of the profession is a cornerstone for why businesses use accountants. It was one of the main issues in the Enron scandal and the other business scandals that followed. Arthur Andersen, Enron’s auditing firm, was implicated in the fraud and corruption within Enron that resulted in the falsification of the company’s financial statements. As a result, its investors and creditors forced Enron into Chapter 11 bankruptcy in December 2001. Finally, having attended that class session and having read the materials, I had knowledge about the issues discussed.

There are number of reasons why the use of a personal learning experience and a personal work experience was appropriate for this study. First, they provided a means of entering the participants’ frame of reference in order to experience their structures of understanding and interpretation of events (Brookfield, 1991). Second, personal experiences are usually an example of a wider and more social context and meaning (Tripp, 1993). In the process of the interview, the researcher moved the conversation from a detailed account of the incident toward a “collaborative, inductive analysis of general elements embedded in these particular descriptions” (Brookfield, 1991, p. 181). Third, asking participants to discuss a series of personal experiences is less threatening to complete than asking them a series of direct questions (Brookfield, 1991). This was especially important in this study where the course content looked at power and privilege within various aspects of capitalism. Since capitalism is considered the primary economic force that governs the way businesses should operate the focus on power and privilege has the potential to provoke strong reactions in the participants. Finally, personal experiences are considered potentially more revealing of a participant’s assumptions, motivations, and worldview than direct questions (Tripp, 1993).
By conducting semi-structured interviews with the participants in this study, I sought to achieve three goals. First, I was trying to uncover issues about how learners incorporate critiques of capitalism into their worldview and therefore into their personal management philosophy. Therefore, my interview questions were directed towards answering one or more of my research questions (Merriam, 1998). Second, I tried to generate thick, rich description so that others could confidently judge whether the findings for my study are transferable. Interview questions were designed to obtain the details about the experiences including the conditions, strategies, and tactics used, interactions among the actors, and the resulting consequences (Strauss, 1987). Third, I sought “to access the participants guiding assumptions and interpretive framework because these inform daily action” (Drennon, 2000). The interview questions were also designed to engage participants in making different kinds of judgments about the learning experiences as captured in the personal incidences. Each interview question was designed to draw out one or more types of judgments: critical, diagnostic, practical, and reflective (Tripp, 1993).

In collecting the data for the interviews, I followed a number of steps. At the beginning of the interview, I reviewed the purpose and focus of my study with the participant asking them to sign both copies of the consent form. One copy was then given to the participant. I confirmed the participant’s permission to tape record the interview and take notes. I also reiterate the confidential nature of the interview and stressed that participation could be withdrawn at anytime. Each participant was asked to choose a pseudonym and I immediately labeled the audiotapes of the interview accordingly. Finally, I asked the participant if she/he has any questions or concerns before turning on the tape recorder and beginning the formal interview.

The actual interviews lasted from one to two hours. The interview consisted of asking the participants questions divided into four separate sections: 1) background information, 2) ethical
issues around the selected class topic, 3) a personal learning experience chosen by the participant, and 4) ethical issues about a personal management experience chosen by the participant. The second and fourth sections that dealt with the ethical issues contained the same questions. All the interviews were then transcribed as soon as possible after they occurred. At both sites, I sometimes conducted multiple interviews in a single day. Therefore, interviewing and transcribing occurred parallel to each other. During this process, I also recorded personal reflections and notes about the interviews and data collection process in a research log. The transcribed audiotapes resulted in 352 pages of double-spaced text. Line numbers were applied to each transcript. After transcription, each interview was emailed to the participant for their review and comment.

Class observations

Most studies designed to describe or interpret an aspect of the learning environment are enriched by the ability of the researcher to be on-site (Merriam, 1998). This is done in order to observe and collect data in the midst of the experience in its natural setting. The researcher is also provided with the opportunity to learn about and understand the dynamics and nuances of the research context. I did observations for the last three classes in each of the courses. “Observations provide a check on what is reported in interviews; interviews, on the other hand, permit the observer to go beyond external behavior to explore feelings and thoughts” (Patton, 2002, p. 306).

Observations and the resulting field notes “consist of descriptions of what is being experienced and observed, quotations from the people observed, the observer’s feelings and reactions to what is observed, and field-generated insights and interpretations” (Patton, 2002, p. 305). The purpose of the observations was to observe the learner and educator interactions – both
among themselves and with the material. Because I attended only the last three class sessions at each site, I acted as an outside observer and did not participate unless forced to do so. At the beginning of the first session, I asked the instructor to introduce me as a researcher. He then briefly explained that I was researching learners’ experiences in a critical management course and let them know that I would be sitting in the class taking notes. The advantage was that I was observing at approximately the same juncture in each class, which better enabled me to make comparisons across observations and participants. The classes at UK University met once a week for two hours. The sessions I attended involved group presentations by the learners about a book related to the seminar topic with class discussions around the issues raised by the book. The classes at Southeastern USA University met once a week for three hours. Each class began with one learner providing a short oral summary and introduction of the readings for the week. The balance of the class was spent in discussion about the topic and readings.

I took extensive field notes during the class period and expanded them immediately after the class. “Field notes contain the description of what has been observed. They should contain everything that the observer believes to be worth noting” (Patton, 2002, p. 302). As Patton (2002) points out however, it is necessary to organize all the stimuli that are part of the observation period, so that it is manageable and focused. I included different types of observations in my field notes. First, I provided a description of the educational setting in terms of the physical environment. “The physical environment of a setting can be important to what happens in that environment” (Patton, 2002, p. 281). Second, my observations provided a description of the course activities and structured interactions. This included noting the beginning and end of structured interactions; who participated and the roles they played; and noting variations in the way that participants engaged in these activities. Third, I observed the
human or social environment that was present in the classroom. This included noting who spoke, did they initiate or respond to the topics or activity, along with the number of times that someone spoke. I also noted the positionality of the speaker and recorded time during the discussions. “Patterns and frequency of interactions, the direction of the communication patterns (from instructor to student or between students) and changes in these patterns can tell us something about the social environment” (Patton, 2002, p. 203). In addition, I noted body language and nonverbal communications of the participants. Finally, I noted the informal interactions and unplanned activities that occurred. “One can’t anticipate all the things that might emerge during unplanned…activities, so the observer watches, listens, and looks for opportunities to deepen observations, recording what people do, the nature of informal interactions…and in particular, what people are saying to each other” (Patton, 2002, p. 286).

Data Analysis

The qualitative researcher has many ways of analyzing the data. In data analysis, “the emphasis is on how to categorize data and make connections between categories. These tasks constitute the core of qualitative analysis” (Dey, 1993, p. 6). My point of comparison was built around the cases of single learners in a graduate business context where a critique of power and privilege in capitalism was the center of attention. I had a second layer of analysis with the observations. Finally, I analyzed the data across all cases and data sources.

In a case study, the most important consideration for analyzing the data is conveying an understanding of the case (Merriam, 1998). In addition, with a comparative case study there are two levels of analysis. One level is the within-case analysis and the other is the cross-case analysis. Within-case analysis involves two levels of understanding. The first is descriptive, understanding the context, participants, and what is happening. The second is explanation, in
terms of justifying, explaining, or supporting a claim. Claims about conclusions are generally supported by three “metaclaims:” 1) a theory has evolved or been tested by the researcher, 2) all relevant data has been examined and irrelevant data has been excluded, and 3) an ongoing and explicit “dialogue” has occurred between the ideas and data (Huberman & Miles, 1994).

The primary method of analysis used was the constant comparative method. This enabled me to compare within a particular interview, observation, or document as well as to look for comparisons and contradictions within each participant and then across the data. The constant comparative method is based on Glaser and Strauss (1967) “grounded theory” approach but “has been adapted by many researchers who are not seeking to build substantive theory” (Merriam, 1998, p. 159).

Huberman and Miles (1994) discuss three subcomponents within the task of data analysis: 1) “data reduction,” 2) “data display,” and 3) “conclusion drawing and verification.” Data reduction is the process of taking field notes, interview transcriptions, and written documents and creating summaries, coding, and developing themes as a way of fostering further data selection that can lead to conclusions. Data display involves organizing the data that has been coded into themes and allows the researcher to compare and contrast themes across participants and data sources. With conclusion drawing and verification, the researcher notes comparisons, contradictions, and patterns, following up on surprises or by checking results with the participants.

As data were collected, an initial analysis occurred that then informed the next segment in the data collection process. This back and forth cycle proceeded throughout the entire process of collection and analysis. In other words, interim themes were developed and insights achieved in order to enhance the next field observation or interview (Huberman & Miles, 1994).
Collection and analysis should occur simultaneously in qualitative research. “In fact, the timing of analysis and the integration of analysis with other tasks distinguishes a qualitative design from traditional, positivistic research” (Merriam, 1998, p. 155). The research was guided by the research questions and initial contents but shifts occurred while concepts and themes were added and discarded as the data were collected and continually analyzed (Marshall & Rossman, 1995). With my research project, not only my initial concepts about how learners incorporate critiques of capitalism into their world view, but also my subjectivities informed my analysis. As a researcher, my job was to continually bracket my subjectivities as much as possible and base my findings on the data.

While I was at each individual site, I collected my data. During each class, I recorded my observations. Immediately after each class, I expanded my field notes in order to capture as much information as possible. Field notes are the fundamental database for the analysis of observations and contain information that will be used “during analysis and, eventually, permit the reader of the study’s findings to experience the activity observed” (Patton, 2002, p. 303).

For the analysis of the interviews, the first step was to transcribe them. The typed transcriptions were arranged with line numbering on the left margin with a two-inch margin on the right to accommodate coding notations. As noted previously, the interviewing and transcribing took place simultaneously. After the interviews were finished, I continued with the transcription while I began coding the first interviews. The primary purpose of the transcription was to capture the words of the participant verbatim. I then read the transcript and began my initial coding for themes directly related to my research questions. I used color-coding to separate themes and categorized them into those that answer my research questions. When coding the interviews, I used the themes suggested by the participants. I continued to read the
other interviews adding and further defining themes as I proceeded with the data analysis and collection.

When I began the coding, I carefully read the transcripts, recording initial codes and themes that emerged from the data. After coding all the interviews, I began a comparison across the list of themes generated from each interview. After combining the lists, I organized the codes into larger analytical themes. The goal of this analysis was to identify categories of themes related to each research question. The transcripts were then reread to compare the initial category definitions with the data in order to review and refine the larger themes that were developing. As data was analyzed, the focus was expanded to try to recognize the diversity within the categories. Writing about the emerging categories and comparisons was also an integral part of the analysis. The key was to continually describe an account of the development of the learners’ management philosophy relating to the categories while refining and expanding on the analysis.

At this point, I began writing up my findings for the research questions. This step considered the purpose of the study along with the research questions. The focus was on comparing the themes across participants to reveal their management philosophy and the effect of the course on the development of this philosophy. I strove to fit the pieces together into a coherent whole and develop visual representations of the findings.

Reliability and Validity

“Reliability refers to the extent to which research findings can be replicated” (Merriam, 1998, p. 205). In quantitative research, reliability is a useful concept. However, in qualitative research it is problematic for a number of reasons. First, in qualitative research, the researcher is the instrument of analysis and the data are filtered through the researcher’s values, knowledge, worldview, and biases. Therefore, it is unrealistic to expect different researchers to reach
precisely the same conclusions (Merriam, 1998). Second, even if two researchers were to study the same situation they would most probably produce different data and findings that would be a reflection of their divergent theoretical backgrounds and interests (Bogdan & Biklen, 1998). In spite of the inherent problems Bogdan and Biklen (1998), suggest that reliability can be assessed according to the fit between what is documented and what actually occurred in the research setting. Similarly, Merriam (1998) contends reliability is established through careful documentation of the whole research process. A detailed research log was maintained during the research project. This log contains decisions made about the design and implementation of the study, documenting decisions made during the entire process. It was also used to record observations and reflections about the interviews and the participants, as well as the connection to the literature. My credibility as a researcher was enhanced by the fact that I have over 20 years experience in management with various organizations and 10 years experience teaching management and other business courses at the University level. I have also fulfilled the formal educational requirements obtaining both a Master of Business Administration (MBA) and am a Certified Public Accountant (CPA).

There are two types of validity that need to be considered in qualitative research: internal and external. “Internal validity asks the question, how congruent are one’s findings with reality” (Merriam & Simpson, 2000, p. 101)? Qualitative research assumes that there are multiple, changing realities, constructed by individuals. “One of the assumptions underlying qualitative research is that reality is holistic, multidimensional, and ever-changing; it is not a single, fixed, objective phenomenon waiting to be discovered, observed, and measured” (Merriam, 1998, p. 202). Merriam (1998) recommends five strategies that can be used in a study to enhance internal
validity: 1) triangulation, 2) member checks, 3) gathering data over a period of time, 4) peer examination, and 5) the clarification in the findings of the researcher’s biases and assumptions. Through triangulation, validity can be increased because the weakness of one source can be offset by the strength of another (Patton, 2002). Triangulation of data sources involves “comparing and cross-checking the consistency of information derived at different times and by different means within qualitative methods” (Patton, 2002, p. 559). Three methods that were useful for triangulation within my study were: 1) comparing observation with interviews, 2) comparing the perspective of the participants from different angles, and 3) using multiple participants who differed in age, location, educational systems, both in terms of US versus UK and Master’s level versus Doctoral level, work experience, gender, and ethnicity. The purpose of triangulating the data was not to “lead to a single totally consistent picture. The point is to study and understand when and why these differences appear” (Patton, 2002, p. 560). Another triangulation approach I used was to have the participants review their transcripts. Triangulation increases the credibility and quality of a research project by countering the concern that the findings are simply an artifact based on a single source, method, or researchers biases (Patton, 2002).

External validity is concerned with the extent that the particular research findings can be generalized or applied to other situations (Merriam, 1998). Merriam and Simpson (2000), point out that the most common way to look at external validity is to focus on “user generalizability.” External validity was achieved in two ways in this study. First, thick rich descriptions were provided along with ample data to allow readers to reach their own conclusions about the match between their own situations and the participants’ experiences. Second, in order to facilitate the
application of the results to a greater range of other situations, a multi-site and multi-participant
design was used in this study.

Researcher Bias and Limitations of the Study

In any research, it is important that we explicitly discuss any associated limitations and
biases (Coffey & Atkinson, 1996). “Understanding different perspectives from inside and outside
of phenomena goes to the core of qualitative inquiry. Experience affects perspective. The
perspective shapes experience” (Patton, 2002, p. 335). Two different research sites in two
different countries were both a limitation and an advantage of the study. As an American, I was
an insider (emic) at the site in the southeastern United States. I also had another insider
perspective there because I am a CPA and have worked in the accounting field at various levels
for 20 years. My insider perspective enabled me to understand jargon and identify more closely
with the participants in the PhD seminar in Critical Accounting. This shared background
enhanced the depth and scope of our conversations and in turn, added depth and dimension to the
analysis. The disadvantage was that I sometimes missed opportunities to delve further into
something the participant said because of an assumption on my part about a shared
understanding. The result of this is that I felt that the interviews with participants at the site in the
UK were richer and more complex. In a similar vein, being a cultural outsider (etic) in the
research site at the University in the UK brought both advantages and disadvantages. Though my
outsider perspective caused me to notice things that an insider might have overlooked, on the
other hand, because I was not familiar with the cultural nuances, I may also have missed
something that was important.

Included in this emic/etic tension is the fact that I have an Americanized view of the
business world. In spite of my current critical worldview of capitalism, I have assumptions about
capitalism as well as the educator/learner interaction and learner engagement/disengagement that colored the way I conducted my interviews, interacted with participants, and with the data. “Methodologically, the challenge is to do justice to both perspectives during and after fieldwork and to be clear with one’s self and one’s audience how this tension is managed” (Patton, 2002, p. 268). One way I managed this tension was to consciously be aware of and actively work to bracket my assumptions during observations, interviews, analysis, and write up of my research. In other words, I approached the data with an open mind, as well as checked perceptions with participants and others. The research log was a useful tool in my reflections about my assumptions and my interactions with the participants. This helped me to keep my biases and assumptions in the forefront as I collected and analysed my data.

Through carefully documented field notes and reflections on their own subjectivity, researchers can guard against the affects of their own biases (Bogdan & Biklen, 1998). This was done through the data collection and analysis stages of the research. It is essential that the researcher is able to recognize subjectivity when it is encountered. Peshkin (1988) explains his method for accomplishing this:

I look for the warm and the cool spots, the emergence of positive and negative feelings, the experiences I wanted more of or wanted to avoid, and when I felt moved to act in roles beyond those necessary to fill my research needs. In short, I felt that to identify my subjectivity, I had to monitor myself to sense how I was feeling. (p. 18)

Some subjectivities that were important during the study were my beliefs that the best way to view and interact with the world is through the lens of critical analysis and when educators use this lens, it may call into question the learner’s current worldview, which in turn may generate learner anxiety and possible resistance to the learning. Therefore, throughout the study, as
Peshkin (1988) suggests I monitored how I was feeling and then systematically document the reflections in my research log in order to determine their effects on the data.

Summary

This chapter has reviewed the qualitative design used in the study for the purpose of examining the learning process that occurs in CMS classrooms and its impact on the adult learners’ management philosophy. Interviews, observations, and documents were used as the primary data collection methods. The constant comparative method was the method of data analysis used in this study. Finally, issues of validity, reliability, along with limitations and biases were presented as they pertain to the research project.
CHAPTER 4

DEVELOPMENT OF THE LEARNERS’ MANAGEMENT PHILOSOPHY

The purpose of this study was to understand how CMS courses affect adult learners’ management philosophy. Questions that guided this study were: 1) How do CMS courses affect the adult learners’ management philosophy? and 2) what factors in a CMS course contribute to the development of the adult learners’ management philosophy?

This chapter will address the first question of the study discussing the findings about the development of the participants’ management philosophy. Three categories were developed to describe a participant’s ending management philosophy. The categories are mainstream management philosophy affirmed, critical management philosophy affirmed, and a change to a critical management philosophy. Each participant will be discussed in the section that represents his or her ending management philosophy. For each participant I will present a short background sketch and then discuss his or her management philosophy.

Determination of a Participant’s Management Philosophy

A participant’s beginning management philosophy fell into one of two main categories: a mainstream management philosophy and a critical management philosophy. It is important to recognize that even though I used specific categories, a participant’s management philosophy started and ended up along a continuum (see Figure 1). Even those who fell at the critical end of the spectrum accepted some of the tenets of capitalism. One end of the spectrum represents someone who supports a mainstream management philosophy. In this category, capitalism is viewed as a good economic system in almost all respects; the most important purpose or
The objective of management is to make a profit — to “maximize shareholder wealth.” On the other end of the spectrum are those who support a critical management philosophy that recognizes capitalism as a system that privileges some while it disadvantages others and that management needs to focus on other values besides profits. People at this end regarded the role of manager to be one where managers use their power to affect an individual/organizational situation by acting in ways that placed other values (employees, the environment, and honesty, for instance) higher than or at least equal to the profit motive.

<table>
<thead>
<tr>
<th>Mainstream management philosophy</th>
<th>Critical Management philosophy</th>
</tr>
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<tbody>
<tr>
<td>Capitalist</td>
<td>Critique of capitalism</td>
</tr>
<tr>
<td>Goal: Maximize shareholder wealth</td>
<td>Goal: Multifaceted</td>
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*Figure 1. Definitions of management philosophy*

In the analysis of the change in a learner’s management philosophy, I established that there were four possible directions for the learner to move. Two of the directions represent an affirmation of the participant’s original philosophy: mainstream management philosophy affirmed and critical management philosophy affirmed. The other possible directions used were that a participant could move to a critical management philosophy or move to a mainstream management philosophy. My analysis revealed that participants were either affirmed in their original philosophy or that there was movement to a critical management philosophy. While I looked for movement in the direction from a critical management philosophy to a mainstream management philosophy, none of the participants moved in that direction.
Looking across all of the participants, six of the eleven participants began the class with a mainstream management philosophy. Figure 2 identifies the participants by beginning and ending management philosophies illustrating the development of their philosophies during the semester. Over the course of the semester, four of these six learners had their philosophy “affirmed” while two participants experienced a shift to a critical management philosophy.

Figure 2. Development of the participants’ management philosophy

The other five participants began the class with some aspects of a critical management philosophy and the result of the class was to affirm and clarify their philosophy. These findings
indicate that learners come into CMS classrooms with different orientations. Yet, the course simultaneously reinforced these different, even opposing, orientations at the same time. This occurred even though each of the courses was highly critical, even anti-capitalist, in nature.

Development of the Learners’ Management Philosophy

A learner’s management philosophy is their worldview about business including how it operates and the role that managers play in the functioning of an organization. In theory, it should inform the way a manager acts in a particular organizational setting. In actuality, it may not necessarily inform their actions so much as it informs the way that they perceive any given situation. However, a person’s perception does have some affect on their actions and decisions.

Mainstream Management Philosophy Affirmed

Some participants experienced the course as an affirmation of their beginning mainstream beliefs about management even when the course content they were studying ran counter to those beliefs. Four of the participants saw the course as helping them to clarify their original mainstream management philosophy. These participants viewed the models of good management and capitalism espoused by both society and their other management courses as worthwhile. “Maximizing shareholder wealth” was the ultimate goal. In essence, these participants began and ended the course with a mainstream management philosophy.

Heather.

Heather is a young Greek-American woman in her mid-20s who is attending UK University for her master’s degree. She comes from an upper middle class family where both of her parents are managers. Her undergraduate degree was in management. She is furthering her education because otherwise “there would be persons that would have more qualifications than me and would get [the] promotions.” Heather resigned from her position as a project leader in
the training department of a firm in Greece to pursue her degree. She spent three years as a trainer and one year as a project leader before returning to school. This experience allowed her to “see things that I should not do as a manager.” Heather was one of the group leaders in her cohort in the master’s program. Her group presented on Schlosser’s (2002) book, *Fast Food Nation.* The general topic for the class that day was the role of agribusiness and globalization in the world.

Heather considered herself part of mainstream management by pointing out that,

If you study, for example, management, your goal is to be a manager and earn a high salary, this is the outcome of your struggle and if you earn a high salary you are not supposed to be anti-capitalist and I don’t consider myself anti-capitalist.

Her parents and their management philosophy were a strong influence on her own beliefs about management and capitalism: “My parents were in management positions so they had good positions and they perceived everyone equally and they have transmitted that.” She was also affected by the political situation in Greece and her own understanding that in the past “labor parties, left wing and people who belong to that, you wouldn’t see them with expensive cars and that but these were real anti-capitalist.” She then described the current political climate indicating that “a leader of the labour party in my country who is considered to be anti-capitalist, she sends her daughter to the most expensive college…I am very convinced that when you have high salaries, when you enjoy luxurious things, you are not anti-capitalist. In my personal point of view anti-capitalist means if you have these principles, you have to make sacrifices.”

At the end of the course, when I interviewed her, she was still questioning the relevancy of this type of course in a management program commenting that, “it’s still strange to me that in a management module we are talking about anti-capitalism.”
Lucy.

Lucy, a white British female, in her mid-20s, attending UK University, has lived in different parts of the world including the United States and Switzerland. She has no management experience but worked in a nursing home for a year, which “turned out to be a really good life experience.” She also worked during some of her summer breaks in a recruitment consultant agency. During one summer, she worked at a big financial services company where she trained some of the staff and monitored their work. She describes herself as “I’ve been lucky...I’ve had quite a privileged upbringing…I’d say comfortable, not entirely rich but not poor.” She also describes herself as “hardworking” and “motivated.”

At school, she was a group leader for her cohort. The general topic of their presentation session for this course was “The Bare Minimum” and the book they presented was Abrams’ (2002) Below the breadline. Lucy, also read the companion book for this topic presented by another group titled Nickel and Dimed (Ehrenreich, 2002). She came back to get the degree because “there are so many people coming out of the universities these days with a BA that it is better to have extra qualifications to go that one step further now.” She chose the management degree for two reasons, “I liked the sound of the course structure…I wasn’t sure which field I wanted to go to…and there is management in every kind of job, every job needs managers.”

Lucy’s beginning management philosophy was mainstream. She explained,

I really had admiration for the person who took a Seattle coffee company, built it up, and it got taken over by Starbucks and they became a success from nothing. They’ve worked themselves from one little coffee shop to a massive chain.

Even though she recognized the criticisms of capitalism that were presented in the course, she revealed that,
I feel like I have more admiration for that person [who started Starbucks] than criticism of reproducing capitalism or whatever. I still struggle to sympathize with people who feel they can achieve a lot by smashing up Starbucks and McDonalds. I guess I sort of understand the criticisms of exploiting other countries’ workers and monopolies and squeezing out competition.

The result was that at the end of the course her mainstream management philosophy was affirmed. She emphasized, “I still have the admiration, so whether this module has changed my view, I don’t know. [In terms of] ethical decision making…if I had the chance to make a Starbucks equivalent out of something small, I probably would.” However, the course did help her to “put words to my thoughts and to find reasons to support what maybe I already felt.”

Sharon.

Sharon, who attends UK University, is a Sikh, British female of Asian Indian descent, who is in her mid-20s. She describes herself as “I’ve been brought up in a middle class family.” She has more than a year of work experience but little managerial experience, although she is the assistant leader in her cohort group. She was a member of the group where the minimum wage issue was presented and her group presented on Ehrenreich’s (2002) book *Nickel and Dimed*.

She is in the master’s program “because of the experience I had of being managed myself and not being happy with it. There’s got to be a right way of doing it.” The biggest reason though that she was in the program was because “I couldn’t get a job. So I thought I’d do something with my time.” Her first degree was in “politics and social politics.” She also “comes from an arts background.”

Sharon also supported a mainstream management philosophy, continually stressing the need “to look at things from the business side of things.” When discussing the issues of the
minimum wage she thought it should be raised because it was hard to survive on that wage. However, she felt that the only real reason to raise it would be that “we [the employers] have to get something back from them if you gave them more than the minimum wage. We can give them incentives like training for taking on extra work.” Her final analysis returned to the goals of productivity and profit in order to justify any change in the consideration of the minimum wage.

Although her mainstream management philosophy was affirmed, she had mixed feelings about what she had learned during the course. This conflict was most in evidence when she talked about how the course made her question where she wanted to work after graduation. She felt she would be more comfortable working in the non-profit sector. She revealed, “In terms of my ethical view, it’s made me think twice about working for a multinational company.” Her original employment plans were that she might want “to work for PricewaterhouseCoopers. I was hoping to be the big hotshot businesswoman. But that’s just gone out the window now. I don’t feel comfortable with that title.” She reasoned that if she really couldn’t affect a change, for instance, in how people were paid in the private sector that at least she could have a positive impact working for an organization that was dedicated to more than making profits.

**Trent.**

Trent, a learner at UK University, is a white, English male in his late 20’s who might be described as working class because “as a student, I had to pay off debt.” In order to pay off his undergraduate loans he worked for four years before beginning his master’s degree. He “had an English degree, which didn’t really point me in any direction.” Therefore, he returned to school because

I wanted to do project and change management…[and you either] have experience so you’re very lucky and manage to get a job doing the right thing or get a qualification
which is going to allow you to do that. So, I decided to do a master’s in management studies.

Trent’s beginning management philosophy was mainstream. He characterized himself as an “ardent capitalist” and felt that the course, “actually reinforced everything I thought already.” He elaborated saying, “I really think capitalism is a very good system. I think it’s human nature that’s the problem. It’s not the system that’s the problem.”

Trent believed that

Capitalism is a system that allows developments; it allows money to be allocated to the right places by a market flow rather than just by allocation by a moral thinking body. It allows freedom if you want to be the kind of person that wants to get to the top, you can, if you don’t, you don’t have to. And it allows all sorts of things.

He did feel, however, that “there should be more dissemination of information and learning, people need to understand that they can make a difference.”

The course did have an affect on the way that he made “decisions generally. Just reminds you that at every point you should be human, not just a money making machine. But I’ve actually found that paradoxically, if you are more human, you are better at making money.” For Trent, the point of being a better human being was not that it was necessarily the right or just thing to do but that in the end it would help a person to obtain the spoils of the capitalistic system – more money. This course reaffirmed his mainstream management philosophy. He admitted that this course “reinforced all of my conceptions of people, of financial systems, of employment. It’s actually reinforced everything I thought already.”
Summary.

Heather, Lucy, Sharon, and Trent, were all students at UK University studying for a master’s degree in management. Heather has a strong resistance to the very idea of the course and the content. To the very end, she did not think that a master’s program in management should even offer a course on anti-capitalism. While she did feel that the course gave her more details about some problems that were occurring in the business world, she did not think that this information was relevant to helping her to be a better manager. She felt that the course depicted managers as “monsters.” And while in her working experience, she had observed some incidents of “bad management” on the whole she agreed with her parent’s view that

The only thing I can do is to make them [employees] feel good, they work in an environment that is safe as much as possible, they would feel free to come and talk to me. They would expect to see me among them.

Lucy gained some understanding from the course about the anti-corporate protesters, especially about the exploitation of workers in other countries. However, in the end, her admiration for the capitalist system outweighed her understanding about why someone would destroy property or protest.

Sharon also held the view that “maximizing shareholder wealth” was the most important goal of management and organizations. However, while the course didn’t move her toward a more critical management philosophy, it did make her feel uncomfortable enough so that she decided she wanted to work in the non-profit sector rather than her original goal of wanting to work for PricewaterhouseCoopers.

Trent did experience the course content as “eye-opening” and he “could not believe some of the things that were happening.” However, his stance was that it was human nature and not the
system that were at fault. For him, capitalism was a great system in spite of how human nature caused people to take things to an extreme and lie and cheat to make a profit. His prior work experience between degrees with various management-recruiting firms outweighed what he learned in this course. He contrasted his first job working for one firm where the managers would lie to clients just to make money versus his second position where the managers were client-focused and honest and still made money. His conclusion from this experience was that “you work with the person [client] you are working [with], you really try and come up with a decent result and you develop a long term relationship. And as a product of that, you get your money and that’s the way it should be.” This reinforced his belief that the problem was human nature and not capitalism.

At the end of this course, Heather, Lucy, Sharon and Trent still supported a mainstream agenda in management and business. For these participants, the benefit of the course was that it provided a vehicle that forced them to look at their beliefs and worldview about business and management and helped them to articulate those beliefs and even to develop a knowledge and language to use with those who were criticizing management and their beliefs.

Moving to a Critical Management Philosophy

Two of the U.K. participants, Daniel and John began the course supporting a mainstream management philosophy. As a result of the course, they moved to a more critical view of management and organizations. While they continued to view capitalism as the primary economic system, they now were aware of some of the problems that were caused by capitalism and the various dilemmas that need to be addressed.
Daniel.

Daniel is an English, white male in his mid-20s who describes himself as “quite a privileged student.” His undergraduate degree in the behavioral sciences “wasn't specific enough” to help him find employment. His purpose in acquiring a master's degree was to gain “a bit more vocational skills...some tangible skills to go away with and apply in finding a job.” Daniel’s group presentation centered on the general topic of “Resistances” and they presented Birchman & Charlton’s (2001) book, *Anti-capitalism*. Before beginning his master's program, Daniel spent two years in Europe as a missionary. He describes this experience as, “a lot of my time there was spent interacting with people who were at the lower end of the wage scale.” He also spent a year working between degrees and acquired some limited supervisory experience directing, coordinating, and scheduling the staff at a local cinema.

Because of this course, he developed awareness about the systemic nature of capitalism and the related problems the system generated. He illustrated this point when he discussed the issue of the minimum wage saying,

You just can’t raise the wage...because then there are other things that kind of have a ricochet affect in other areas of the economy, on the world economy, on the local economy, on the country economy, and also in terms of price.

He also expressed a critical understanding of the complexity of the issues and their extension beyond the economic realm when he explained that, “it is not as simple as that because often there are cultural overtones, the socialization that this is how life is. There’s nothing better that comes about.”

Daniel moved to a critical management philosophy as a result of the CMS course. Daniel’s view of the impact of the course was that it “has definitely made me see that there is
more to business than management and making profit.” He felt that making a profit “is an important aspect of it, business is there to make money, and it’s not there to be charitable.” However, through the course experience, he gained new knowledge about the ways corporations focused almost exclusively on profits to the detriment of human beings. This moved him to a critical stance that profit was not the only aspect of business that was important. As he said, “you [would] think a responsibility that each of us has, whether we are the manager or the employee, [is that] we have opportunities to influence situations.” He explained further, “it is important to make sure that you fulfill your responsibility to other people. It’s not just about making the most money and who cares what happens to anyone else, which unfortunately is the way that it comes across sometimes.”

\textit{John.}

John was the second participant who moved to a critical management philosophy as a result of this course. John is an English, white male in his mid-20s, attending UK University’s masters in management program. He self-identified as “middle-class” and defined this concept as “most people at University have got parents who can help them out quite a lot.” His undergraduate degree was in business. His purpose in getting the degree was to obtain “more knowledge and understanding of business and management and also to increase the opportunities for employment.” Like Daniel, John’s group presentation focused on “Resistances” although they presented on Klein’s (2002) \textit{Fences and Windows}. He had some work experience but no management experience.

John’s beginning management philosophy was mainstream. His undergraduate degree in business had provided him with a firm foundation in mainstream management philosophy. He described it, as “Before I took this course, I would have thought that effort does mean something
at the end of the day, it’s productivity. I guess I was a capitalist at best.” However, the course moved John beyond the political stances of his parents and beyond his prior educational experiences that focused on the goal that “you’ve achieved something” if you have secured a management position as opposed “to be a nurse or something else...you’ve not reached your full potential.” John did not understand “how or why a nurse, for example, should get paid a lot less than an executive of a company because surely what they are doing, saving people’s lives or helping people, should be valued more highly than a CEO of a multinational company.”

The development of John’s management philosophy was affected by the intersection of the past expectations and influences of others with the course content and format. At this intersection, he experienced a move away from a conservative political lens that was in line with mainstream management philosophy, to one that was more critical. As he said,

I guess I’m looking at things in a different way, I’m starting to not just accepting what I’m told and what I read, I’m starting to sort of be, “Well, what is going on here?” - trying to look a bit more into it.

By the end of the course, John had moved from a mainstream management philosophy to a critical management philosophy. His views by that time were that

Basically, productivity and profits wouldn’t be what I solely focused on. I would still consider them...obviously, it would still be important. Obviously, you do need to make a profit to survive, to keep your workforce there. But it’s not the be all and end all so you would take other things into consideration.

For John this meant that you needed to do more than just hire and fire employees based on their productivity, it was also important “to think of the consequences of it and I think you should try and use people and use people’s skills in different areas of your company.”
Summary.

The course helped Daniel and John to expand their management philosophy beyond the mainstream management agenda. In a movement toward a critical management philosophy, they both felt that there were other things that needed to be considered that were at least as important as “maximizing shareholder wealth” and managers had a responsibility to consider these other issues. In these two cases, unlike those whose management philosophy was affirmed, the course and critical reflection resulted in a change in their previous management philosophy.

Critical Management Philosophy Affirmed

Two of the U.K. participants, Edward and Gary, and all three of the U.S. participants, Ann, David, and Rosemary began the semester supporting a critical management philosophy. They all told stories about prior work experiences where they acted from an ethical or critical stance placing another value higher than profits. In fact, their actions resulted in less profit. These participants thought that this course affirmed their beliefs.

Edward.

Edward is a Turkish citizen studying in England for his master’s degree in management at UK University. He is in his later 20s and his work experience involved working for his father’s textile firm where he was a textile engineer before going abroad to further his education. His group’s topic was agribusiness and globalization and the book that his group presented was Bové’s (2001), *The World is Not for Sale*.

His view was that “successful managers should be kind of an intellectual person.” Therefore, education was important for him to be a better manager. Edward comes from a privileged background: “I’m here in England getting my education that costs a lot of money; my father can afford it because he is a businessman.” In addition, he is someone who is
knowledgeable about the employment conditions in his country: “I know in my country that those who are working minimum wage can’t afford to eat meat every day or maybe a few times a week.”

For Edward, being ethical was about doing something positive to benefit others as opposed to refraining from harming someone. He told the story about the decision to purchase a new machine for use in his father’s textile factory:

One of the criteria that he [his father] used to make that decision is to create more job opportunities. That was one of the criteria supporting his organization. Maybe if he found in the purchasing process…just to breakeven, he would have made the same decision as well, just in order to create more jobs.

Edward also related the story of his family’s business and a decision they made to have their employees continue to work and paid them even though the economy had significantly curtailed their sales.

That is not a kind of business decision [you make] if you are a professional. You don’t [make these kind of decisions] because that means you are giving money from your pocket. But they made that decision in order to not cause any loss of jobs. I think that was an ethical decision, because they didn’t want people to lose their jobs.

Both of these stories focus on putting the employees’ livelihood and creating jobs for others above making a profit. In the first example, mainstream management wisdom would have elected not to buy the machines if the company would only come out even in terms of profit. Then it would have recommended in the second example that rather than paying the employees and hoping for future sales that the money spent on salaries should have been invested
elsewhere. However, Edward agreed with both of these decisions and said that he would still make the same decisions today. He agreed with these decisions saying that comes from my family, my father’s viewpoint, money is not everything. If that many people, two hundred or two hundred and forty would lose their jobs, it will affect us much…to see them happy, to see them earn something. In my country [Turkey] there is a phrase “to break bread with all” [because] you see that you are thinking that you are the reason that they can break bread together.

This course did not change his philosophy but it affirmed his views that ethical considerations are important, provided him with “some important ideas” and helped him to articulate his point of view about his critical management philosophy:

I think this course explains that we need to bear in mind that there are ethical worries besides the business stuff. I see different issues that focus on the money and the money doesn’t mean anything, there are some other things that are ethical stuff. I mean, in some ways that the course is telling us to think ethically not only in a business style but also in some ethical ways.

His understanding of the values he thought were important in business were summed up when he related,

It is obvious that you want to earn more money but when it becomes the decision that it’s not important…if we are going to lose something, the values, the money becomes unimportant to us. But I think that’s the kind of specific thing because that’s my family’s viewpoint and therefore, my viewpoint.
Gary.

Gary is a learner at UK University. He is of Anglo-Indian descent and a British male in his mid-20s. His undergraduate degree “is in the public sector, public administration and management.” His group’s topic was “resistance” and the book presented was Klein’s (2002), *Fences and windows*.

He has three years of work experience as a butcher and some informal management experience as a team-leader as the head butcher in a supermarket. One of the situations he had to deal with was management’s directive to throw away extra meat sent by mistake to the supermarket. If they sold the meat, the store would have to record a loss. So, management preferred to throw the meat away rather than sell it at a loss. According to Gary,

In the end, I reduced it. I was like “if you want to throw it away, you throw it away, I’m reducing it.” So I did. I sold it and I said to the manager, “Well, if you have got any problems, call me in…until you stop this happening, I’ll do whatever I want” and they were like, “We’re your managers.” “Yeah, but I’m the butcher.” This kind of power struggle [was going on].

He entered the course with a critical management philosophy indicating that before the course he did not believe that “profits should rule.” He related that

The course has confirmed my beliefs. I want to say I used to follow the rules but now the course has made me argumentative. I was kind of argumentative in the first place and what this [master’s program] has been saying to me so far is that…profit rules. I believe profit shouldn’t rule so, this course has confirmed more what I think. Critical perspectives, when you go through the books, [say that] profits shouldn’t always matter;
there are obviously human beings out there. There are actually more important things than profit out there.

This CMS course provided Gary with arguments and ways to articulate his prior beliefs. He also felt that he got a real education in terms of power and the limits of resistance. Although he related a past work experience where he went against the direct wishes of his managers because of his ethical beliefs, this course complicated his prior view about the use of power in management. For Gary, “what this course has meant to me is that there is a struggle between power…there is power and there is resistance. All this [resistance] means that the resistance is making power much stronger.” He further explained that “resistance can only challenge power so far…and all this protesting, to me, has done is kind of say well…what has it actually achieved?” Gary did not think it had achieved very much except perhaps to get people talking about things but there was no action that really changed the way things are done in management and organizations.

Ann.

Ann was a learner at Southeastern USA University. She is a white, American female in her early 40s. Before returning to get her PhD in accounting, she was a Certified Public Accountant (CPA) and worked as a financial analysis in the airline industry, as well as in city government positions. She has more than ten years of work and managerial experience. While she enjoyed her positions in industry, she “always wanted a PhD.” She describes herself as “the only Republican in this class” and except for one other student, “I’m the only religious person in this class.” She was the child of a military father and grew up on military bases that she described as places with a lot of diversity. As a teenager, she moved to Alabama where she lived until coming to Southeastern USA University.
Ann’s final paper for the course was “An analysis of ethics and the accounting profession using Structuration theory.” The purpose of her paper was to discuss the complexities of the ethical issues faced by the accounting profession. This was her first semester at this University. She had transferred from a very “empirical financial school” because her interests were more focused on being a “behavioral researcher.” She felt that the previous school was not open to her interests and ideas: “I’d give them my list of things I wanted to research and they would cross them off and…I had to write what they wanted me to write.”

This class was her first exposure to critical concepts: “I had no concept that the critical theory work existed.” She thought that she was the only person in her field that was not part of the critical management loop – the only one unaware of this research stream using critical theories. However, after contacting faculty members at her old school she learned that “they don’t know what I’m talking about. So, it’s not just me that was uninformed.”

Her previous experience illustrates her starting critical management philosophy. She was working as an accountant for a city government that she described as “the most crooked place I’ve ever been in my life.” However, she self-identified herself as “I really felt like I was a person who had integrity but I still went to work [there] everyday.” In this position, she “absolutely refused to do many of the things I was asked to do.” She did this in spite of the fact that “I refused and I know I was punished. I was punished in office space, I was punished in raises. I was punished in lots of different ways and I could see how it would be easy for somebody to give in and I saw lots of people give in that might have done otherwise.” She concluded from this that the accounting industry needed to address “the independence issue” by “fixing the structure” around this issue. This was important because “I just see the independence
thing because it is so overarching, you know, no matter what issue you look at, it’s still always there. It’s the one you can’t get away from.”

While working in this city government position as a senior accountant, her direct boss asked her to do something that was unethical and illegal and she refused. She recounted, “I don’t remember what the thing was that she [the Mayor] wanted done. But she wanted some money moved or something done that we couldn’t do, it was against the rules.” The result was that her direct boss, a political appointee, was fired. When I asked her if she knew beforehand that he might be punished she replied, “I knew he would be punished.” I then asked her if she had anticipated the severity of the result of her stance. She replied, “I knew it might be. I couldn’t do it. Couldn’t do it.” She said that she would still make the same decision today and refuse to do something unethical.

While Ann’s husband worries that she had “given up her religion” as she has moved further along the critical management spectrum, Ann feels that the course has helped to “make me more liberal,” and has helped her “expanded myself.” The course gave her “a broader view” and she intends to “try and incorporate some of what I’ve learned here, in my research.” She felt that some people might just want to focus exclusively on the critical theory aspects of accounting and management. However, she also thought that it was important “to have a person in behavioral [accounting] that knows something about critical theory that can add that little bit and then that person can pass on to somebody a little bit of critical theory.” She felt that she has learned to articulate her critical management philosophy and so could be someone to pass this knowledge onto others.
David.

David is a PhD student at Southeastern USA University and a CPA. He is a white, American male in his middle 40s, divorced with two children. He grew up in a middle class home where his father was an attorney. Similar to the other participants from Southeastern USA University, he has over ten years’ work and managerial experience. He has more than 13 years in public accounting. David’s accounting career spanned a number of industries and firms both within the area of public accounting and private industry. For instance, his work in public accounting led to his working with the Alaskan Native regional corporations and also doing government related work in Samoa America.

In 1998, he returned to school to get his MBA with an emphasis in marketing. His final paper for this course titled “A Genealogy of NANA Regional Corporation” describes the use of accounting reports to legitimize the federal government’s termination of substantial trust obligations with respect to the Alaska Natives. The purpose of the paper was to discuss the historical pattern of exploitation engaged in by western economic interest and the shortcomings of accounting that contributed to this exploitation. He self-identified himself as a “poststructuralist.”

David’s story illustrating his critical management perspective before starting the course involved his first job in private industry, following a two-year stint with a CPA firm. The story was about a situation where using proper accounting procedures would result in big losses for the company. In this instance, a legitimate (but from David’s point of view – dubious at best) change in depreciation helped the company to go from a substantial loss to a slight profit. The result was that the company started with a pre-audit profit of $11 million, but toward the end of the audit, the financial records showed a substantial loss. However, “when the audit came in, it was [closer
to] a two and a half million dollar loss.” The reasoning behind making sure that the firm showed the smallest loss possible was to ensure that the private investors would not need to give the company any additional cash. He felt that this story illustrates the conflict of interest that is prevalent in the field: “the accounting firm, they were put into a pickle, okay? They were getting eighty thousand dollars for the audit, which I knew, was a significant amount of money for the Anchorage office. You know, you can’t just…especially when you know…this is what’s going on…you have to do something. Then, they still go through whatever they can do to put lipstick on that pig. And the change of depreciation methods and all that kind of stuff, even though you do all the restatements, I don’t know…there’s no sense in that.”

The result of the course was to affirm his beginning critical management philosophy and help him understand the issues in a more complex way. His assessment of the course and how it affected him is that “in one respect, I guess, from how a critical accounting course might have changed my view on ethics is that it put ethics more in context, you know. And this kind of gets back to my poststructuralist roots in that what’s ethical for you isn’t necessarily ethical for me.” He also felt that “I can’t say that it [the course] has clarified ethics any, if anything, it has made them a little bit more complicated. At least I realize that they are more complicated. It certainly hasn’t tried to make me think one way or another.”

Rosemary.

Rosemary is a white, American female in her late 30s, attending Southeastern USA University. She has more than 10 years of managerial and work experience. She is an accountant although not a CPA. She worked for both small and large businesses. At one point, she managed a department with 30 employees. Unlike the other two participants in the critical accounting seminar, she is pursuing a PhD in Management Information Systems (MIS).
The title of her final paper for the course was “An epistemological approach to knowledge management and the design of distributed cognition systems.” In this paper, she proposes design principles for a management information system that incorporates Habermas’s theory of communicative action, Churchman’s inquiring systems, and hermeneutics.

Her educational background was the most varied of all the participants. Her first undergraduate degree was in accounting; she then got another undergraduate degree in psychology and biology, and was a premedical student. After attending medical school for a while she then went back to get her master’s in MIS. The MIS master’s “was interesting to me from my work experience…it allows you to look at so many different things like the philosophical stuff…or from a really technical perspective…and I really like that.” She took this particular course because she liked the way that it bridged philosophy and accounting.

Her previous working experiences demonstrate her beginning stance with a critical management philosophy. These experiences included working for a small software company where her primary job was accounting and database management. When this company got into trouble, “the president of the company tried over and over again to cook the books so that the stockholder’s didn’t see what was going on and so that he looked better and the company survived.” In this instance, she felt “that with him, he was just panicked, and panicked on a personal level not necessarily…you know, the economy was bad at the time and so he was just panicked.” In other words, he was doing something unethical because he was trying to survive on a personal level. She contrasted this with working for a larger company where she was the only female in senior management and at the same time, she was “the lowest one on that totem pole.” At this company, the head of the corporation
helped one of his right hand men from the navy steal those contracts out from under our company after the feasibility studies were done to set up his own company and take them and leave. It was like six million dollars worth of work. And so what I saw there wasn’t…I mean, those guys were all doing fine before they showed up at that company and so it wasn’t kind of that…I mean, that was just flat out unethical.”

In this instance, the employee was not fighting for his personal survival but stealing to enhance his personal wealth.

In the first scenario with the smaller company, she explained, “with the guy in the small company, I quit. And there was no other way around it. I knew what I was doing and knew enough of what I was doing to get into trouble if the company had gone under and my only option was to quit. So, I quit, that was my ethical decision.” In the other scenario, the theft of the contracts involved federal funds, which made it a federal offense. She explained that in this situation the vice president of our division was one of those guys and he was shredding a bunch of paperwork and we had to…decide what to do with that. And so I went to the FBI who had been in and out of my office and so I already knew those guys.”

She continued, “it’s hard to go against your boss, it’s hard to not know if you have a job left, it’s hard to go against the powers that be, you know, I went up against all of them.”

Rosemary began the course with a critical management philosophy. The course did not really change the way she thought about things but it gave her a new lens to use to articulate her philosophy. According to Rosemary, “from a critical perspective…there’s not a lot of resolution offered…I think every situation is just so unique…[however] it allows you to look at it…they [critical perspectives] are just a way to look at things.” For Rosemary, the bottom line was that
this course “may change how I look at situations but I don’t think it’s changed how I make those kinds of decisions.” Therefore, the course affirmed her views and “made me see how important it is just to sit back and examine things and I think I would continue to do that and not get so locked up in the day to day stuff.”

Summary.

All of the participants who started the course from a critical perspective had prior work experience that informed their views. Ann, David, and Rosemary from Southeastern USA University had been involved in unethical situations where as accountants they needed to take stances that resulted in someone being fired, a federal investigation by the Federal Bureau of Investigation (FBI) or even a major restatement of the company’s profits. Even Edward and Gary from UK University had prior experiences where the result could have been that either they were fired or their employees would lose their jobs based on their ethical decisions to situations.

These participants experienced an affirmation of their beginning critical management philosophy. The course “confirmed” and “expanded” their beliefs and as Edward pointed out “explains that we need to bear in mind that there are ethical worries besides the business stuff.” In addition, it “put ethics more in context” and provided another lens “to look at situations.”

It supplied them with a way to articulate their critical stances. The U.S. participants were older, had more work experience, and were students in a PhD program that had an underlying critical accounting framework. Therefore, they more readily accepted the critical concepts of the course. Even so, David described the course as a “painful” experience as he delved further and further into the systemic nature of the problems. For the U.K. participants there was more of a sense that this course provided them with a language and the tools to articulate their own ethical viewpoints in the language of management. These participants experienced the course as “giving
them some important ideas” that affirmed their already critical perspective and in some cases helped them to articulate their beliefs more clearly. Similar to those students who found that their mainstream management philosophy was affirmed, these students also experienced an affirmation of their critical management philosophy.

Chapter Summary

This chapter began by providing the findings for the first research question concerning the development of the adult learners’ management philosophy for each participant along with some background information. The findings indicate that learners bring their own philosophies into a CMS classroom. Some may already have a critical management philosophy, while others will have a more mainstream management philosophy. I found that while some learners moved to a critical management philosophy, for the most part, the learner’s original management philosophy was affirmed. Figure 2 portrayed the participants and their beginning and ending management philosophies. I will address the question of the learning dynamics occurring in a CMS course that affect the development of the adult learners’ management philosophy in the next chapter.
CHAPTER 5

FACTORS CONTRIBUTING TO THE DEVELOPMENT OF THE LEARNERS’ MANAGEMENT PHILOSOPHY

The second research question developed to guide this study asked, What factors in a CMS course contribute to the development of the adult learners’ management philosophy? The Role of Content and the Role of Process were the two primary factors that emerged from the data. The findings are presented under the two factors and then within each factor there are elements that further contributed to the formation of the learners’ ending management philosophy. The Role of Content has two elements designated as prior educational experience and prior life experience. The Role of Process has two elements defined as the role of the instructor and discussions both inside and outside of the classroom setting. For each element examples are provided to illustrate how this dynamic affected the participants as they developed their ending management philosophy.

Factors

Learning dynamics are the interactions that occur between the learner and the course content and process, between the learner and the other students in the class or outsiders as they communicate about the course, and the interaction between the learner and the instructor. This study determined that the main factors that influenced these interactions and the learning occurring in these CMS courses were content and process. These factors and their various elements, as discussed below, affected the development of the learners’ ending management philosophy.
The primary factors influencing the development of the participant’s management philosophy were (a) course content interacting with the elements of prior educational experience and prior life experience that could act as a bridge to the concepts of CMS, and (b) the process in terms of the role of the instructor and the discussions which occurred both inside and outside of the classroom setting. Each section will begin by discussing the factor and its attendant elements. I will then discuss how each influenced the development of each of the three ending management philosophies.

Interaction of Course Content with Prior Experiences

One pivotal factor that influenced the development of a learner’s management philosophy was how the participant linked their prior life experiences and prior educational knowledge to the course content. For most of the participants, this course was their first exposure to a critical perspective not only in management but also in any subject area. The learners interacted with the course content in terms of their prior educational experiences and their life experiences. Prior experience acted as a guide to the validity and usefulness of the course content to the participant’s personal situations. This strong influence determined the way the course affected any change from their beginning management philosophy. This section will discuss each ending management philosophy in terms of the confluence of the course content with the elements of prior educational experiences and prior life experiences.

Mainstream Management Affirmed

All of the participants whose mainstream management philosophy was affirmed had strong experiences or beliefs that outweighed any new knowledge learned in the course. Although Lucy felt that the course content “put words to my thoughts and to find reasons to support what maybe I already felt,” she firmly believed that her “views are determined by my
upbringing, my experiences, and my education more than just one module course.” Sharon talked about her ability to link the course content to her prior educational endeavors and how “it sort of related back to my politics background and that I was really pleased about.”

**Prior educational experience.**

Only two of these participants, Sharon and Trent had any prior experience with a critical perspective in learning. Sharon’s prior exposure was through her undergraduate degree in political science. This critical perspective was used mainly in looking at the “imperialist stuff” and she described that, “it has sort of helped me link to my views of that [undergraduate degree] to what is going on now in terms of anti-corporatist movements.” She also revealed “a lot of things I’ve felt about the imperialist stuff, ‘that happened then,’ I feel in the same way about the anti-capitalist.” Sharon described the critical perspective revealed in the CMS course content as “from a critical perspective…it’s actually about the tactics that are used and the ulterior motives that people have. So that all goes near the grain – on the other way.” Sharon engaged only with those aspects of the course that related to her prior coursework. When discussing the minimum wage, she related

I’ve done social policy as part of my politics course as well, so I had done a lot of work about the poverty line, and how so many people are under the poverty line. But I wasn’t ignorant towards it but my knowledge of it wasn’t very deep. And I found that concept quite boring. But that has quite changed since taking this course…. I find it a lot more interesting. I would actually probably read up on it a lot more. If I see an article in the paper about it, I would actually read it. But before I don’t think, I would actually have been very interested in it.
With his undergraduate degree in English, Trent was familiar with the concepts of looking at things from a critical perspective. He explained,

I am the only person in my group who reads all the readings and gets it. So, I understand what they’re talking about cause I’m use to reading a reading where you get to the end and you’re not really supposed to feel there’s been a triumph or you’ve learned something. It’s more changing the way you think about something.

In addition, Trent’s prior studies in history formed his belief that human nature, not capitalism was the problem. He related his view that “in history, there’s wars and battle and bloodshed and leaders and people telling other people what to do and they rise to the top for various reason.” However, from his point of view, “what they’re talking about in the anti-capitalism problem is that the capitalist system is being allowed to run riot, they are getting too much power and it’s human nature that is causing the problem.”

Based on her prior experiences, Heather’s reaction to the course was to question the relevancy of the course content in her management program at all. She reported,

In the beginning, I had this feeling of why all the books the instructor chose for the course had to do with antimanagement. I was confused about the content. Why a course like this should be in a management module? Because it was the feeling that in a management module, you would have a course that relays management.

Although she did not necessarily question the accuracy of the information of the course content, she felt that it was not the only side. Heather told me,

To be honest, after having four years of strict management education, I don’t feel a hundred percent convinced. I respect and I understand and I believe all of what I have heard to be true within organizations, they exploit workers, they do all these bad things.
But we should not only look at this side, things can be changed as was pointed out in the presentations. I had this feeling that the whole module tends to present managers as monsters but we are still employees and as a manager you have to follow some regulations within the organization because you think, “I’ll lose my job and I won’t be able to support my family.”

*Prior life experience.*

Sharon was able to establish links from the course content to her previous degrees and coursework; however, it was a different matter when she talked about the experiences of the minimum wage earners in her father’s hosiery firm. Then she saw the issues in a different light explaining,

> We are lucky in a way that if someone takes a day off, they don’t want to be paid for sick pay because, again, it’s a family atmosphere. But I suppose if I was working perhaps in the public sector, not just people in the minimum wage and poor people but above that as well…we have to get something back from them if you gave them more than the minimum wage. We can give them incentives like training for taking on extra work.

She forged links from her prior experiences to the course content only on an abstract level allowing her to affirm her mainstream management philosophy.

Trent also had strong prior experiences that resulted in the affirmation of his mainstream management philosophy. Based on his work experience for four years before returning to school, he felt that “I had some knowledge of the capitalist system and how it worked and doesn’t work.”

Heather demonstrates the clearest picture of the role of experience in affirming a participant’s mainstream management philosophy. Heather had a high need to be authentic. She
talked about people who say one thing and then do another. Her opinion was that “It’s useless. It
doesn’t hurt me but it is your own principles. It’s your conscience.” She also felt that “if you earn
a high salary you are not supposed to be anti-capitalist and I don’t consider myself anti-capitalist
because I would [have to] pretend that.” This translated into strong convictions about who could
espouse anti-capitalism. “I am very convinced that when you have high salaries, when you enjoy
luxurious things, you are not anti-capitalist.”

Both of Heather’s parents were managers and they had a strong influence on her thinking.
She explained,

In my point of view, if I imagine myself as a manager, I have learned how to respect
people. I believe that all people within an organization beneath their managers or
workers, they are equal. My parents were in management positions so they had good
positions and they perceived everyone equally and they have transmitted that.

Her view of the system and capitalism was that she knew certain things needed to be changed but
as an individual manager, she was powerless to do anything. Her assessment, based on her prior
work experience, was “I knew that the situations do exist because if you have worked you know
what is going on. But I don’t know [if] I, as an individual, can change that.”

She also had a long history that had brought her to this point in her life where she was
studying abroad for her Masters in Management degree. She told me

Imagine a person that all his educational life has done management…for people who
were determined that “I want to do this job”; the course put things into questions. And I
said to myself, “I want to be a manager, I want to learn the principles, I will have to
compromise” but I don’t perceive that corporations are something evil. They can change
if people make them change because they will be concerned with losing their customers
as we mentioned in our presentation. It was okay the whole course, but still I am not a hundred percent convinced of what the instructor says.

*Summary.*

The participants who experienced an affirmation of their mainstream management philosophy felt that the information they received from the course content did not change their beliefs based on their prior educational and prior life experiences. They tended to view the course content as being extreme. As Heather pointed out, managers were portrayed as “monsters.” Trent viewed the course content as a vehicle to gain knowledge “it’s informed me, in terms of knowledge, it’s given me examples of things that have happened, for example, the Bolivian strike.” All four of these participants viewed the course as providing information and something they needed to pay attention to only because it was a required course. However, this information only served to affirm their belief that as Trent said, “it’s not capitalism that is the problem, it’s human nature.” The participants viewed the questions posed by the course content as leaving them with only two choices – you are either a capitalist or an anti-capitalist. Viewing the choices that way, the course content affirmed their original mainstream management philosophy.

These examples demonstrate that the participants’ experience did not provide them with the kind of bridges or foundation that would allow them to use the course content to develop a different view of their management philosophy. While there were some connections that occurred, they were not sufficient to enable the learner to move toward a critical management philosophy. In most cases, their experiences were actually a barrier to any movement in a critical direction and not only outweighed the new knowledge offered from the content but in fact served to affirm their beginning management philosophy.
John, who moved to a critical management philosophy, expressed his exposure to the course and the content, as “I’ve never done anything like this before.” While Daniel recounted “I’ve spoken to quite a lot of people in the course who’ve had a lot of problems kind of acclimating to how the course is taught.” Both their prior educational and life experiences were very different from the course content presented. In spite of this, they were able to build bridges from their experiences that allowed them to integrate the past into their new knowledge.

*Prior educational experiences.*

Neither Daniel nor John had prior experience with a course that was critical in nature. Daniel’s reaction to the course content was positive as he explained,

> Because of my background in social sciences, I’ve found that this has really helped me kind of put it…kind of made a link between the two disciplines. This is what I’m really interested in, not just doing it to get some skills; it has kind of made the two mesh together. So, I’ve really enjoyed this thus far.

John’s prior experiences were the type that might have led to just affirming his beginning mainstream management philosophy. He described prior educational experiences as teaching him “to run your own business, to be the chief executive of business and I mean, we’ve been sort of told that’s the thing to do, you’ve achieved something with your life if you reach that position.” In spite of prior educational experiences, John was very interested in the course content and the new way of looking at management presented. Because of his interest in the concepts, he was willing to do additional reading and to seek out different sources to obtain new information and viewpoints. As he explained, “a lot of it I was doing it myself, you know,
reading different things. Reading different newspapers than what I usually read but then that was helpful when I was coming back and we were discussing this.”

Prior life experience.

Daniel thought the course content helped him “to see kind of how management fits into the real world.” When discussing the minimum wage issues Daniel linked the content to his prior experience as a missionary and pointed out,

From that point of view I was able to see…I have been out and experienced that situation a little bit to see people’s lives that were struggling day by day just to have enough food to eat. But I don’t know…I don’t think I’d really thought about the implications on a wider scale. I’d seen implications on a personal scale but not the ricochet effect that I was talking about that has implications in all realms of society.

The result of this intersection of experience and content was that he was “taken aback sometimes”; he also felt that it was “tragic,” and “sad.” The course content had a profound effect. “I was reading the book [A guide to anti-capitalism] thinking this is terrible, this is the kind of thing that you can’t imagine what actually really happen.”

John described himself, before the course, as someone who “would have trusted the government of Britain and America a lot more, I probably wouldn’t have questioned them so much [about the war in Iraq].” However, the course content engaged him on a level he never anticipated allowing him to move beyond his prior experiences to view them in a different light and move to a critical management philosophy.

Summary.

The two participants who moved to a critical management philosophy used their past educational and life experiences as bridges to build a connection to the course content and a new
way of looking at the world. In essence, what happened that was different from the mainstream participants was that they developed a link that had not previously been there. Through the course content, they acquired a different way of viewing their experiences that moved them to a critical management philosophy.

**Critical Management Philosophy Affirmed**

Those participants who experienced the course as an affirmation of their beginning critical management philosophy did so because their past experiences were aligned with the course content. The content confirmed their prior experiences and in some cases provided a language to articulate these experiences. All of the participants reported prior experiences that had formed a basis for a more critical management philosophy. Except for David and Sharon, these participants had no real exposure before this course to CMS or even a critical language to articulate the way they viewed the world. Therefore, in this case, the intersection of the participant’s past educational and life experiences and the course content was instrumental in affirming their critical management philosophy.

**Prior educational experience.**

David and Rosemary, two participants from Southeastern USA University, had prior experiences with CMS courses. Both had taken a previous course as part of their PhD program that was an introduction to critical accounting. For the other participants, this course was their first exposure to something of a truly critical nature. The critical accounting course at Southeastern USA University was Ann’s first exposure to any type of critical theory concepts. Although she began the course with a critical management philosophy, she pointed out, “I had never seen any of this stuff and never had heard of any of these authors.” As she noted “I didn’t understand what they were talking about.”
Edward linked the course content and his prior educational experiences because unlike prior courses he felt it addressed issues that related to the “real world” He elaborated by saying, The topics, which are taught in the module, I think they are very important issues in the twenty-first century. In addition, as managers, I think we should be comfortable with those issues. And usually people don’t read about those topics. When you get that kind of module, you have to read, otherwise it is impossible to discuss and have some openness.

Prior life experiences.

Rosemary experienced the course content as “it may change how I look at situations but I don’t think it’s changed how I make those kinds of decisions.” The various critical perspectives presented in the content provided Rosemary with “the motivation to look at it and none of those theories are right or wrong, they are just a way to look at things.” Edward’s critical perspective and values “comes from my family, my father’s viewpoint, money is not everything” and the course content served to confirm this philosophy. He pointed out, “before this education [CMS course], I sometimes think about those issues but I never go that deep. But during this education I am trying to find some solutions and I’ve begun to think about what I am going to do when I go back to my country, because I will manage people.” He felt that the course provided him with a way to start thinking about what he might do when he returns to Turkey. As he explained, I need to do something. I knew this course would make it more clear; I know that I need to do something. So maybe I’m not sure what I’m going to do, but at least I start to think about and try to find a solution and I think that is a process. Once you begin, it will take step by step and you will find a solution in one point but it may take some time. I can say that course has helped me too with stuff that I need.
Gary described himself, as “I was kind of argumentative in the first place.” While the course content affirmed his critical management philosophy, it also tempered it. He explained that “what this course has meant to me is that there is a struggle between power…there is power and there is resistance. All that means is that the resistance is making power much stronger.”

David illustrates the way the participants interacted with the course content on a very personal level connecting them to their prior life experiences. This was most evident when he recounted his story about writing the final course paper.

You start with that [a theory] and then you go back into I guess you call background stuff that you know. And so when I ended up writing about the Alaskan native situations, you’re dredging up a lot of - for me, it seemed like there was a lot of - I found it very difficult to divorce - or you can’t divorce your own viewpoint away from that type of work.

While his past experiences helped him to resonate with the ideas of Foucault presented in the content, he regarded the affirmation of his critical management philosophy as a very negative endeavor. The story is always the same. It’s a matter of subjugation and colonialism and the exercise of power and greed. Then everywhere you look that is what you see and somehow or another that rubs off on you. And I went through that kind of process and so I felt pretty uncomfortable with it. But then again I also realize that’s the way I see the world.

When a participant experienced the course as an affirmation of their critical management philosophy the interaction with the course content was deeper and spanned a number of different levels, including gaining a new perspective that could help them with their anticipated real world problems, as well as helping them to find out more about who they were as individuals.
Summary – Interaction of Course Content with Prior Experiences

In looking at this factor that contributed to the development of the participants’ management philosophy, these examples demonstrate that not only did the participants begin the courses with different management philosophies but they also began at different places in respect to their prior exposure to thinking about ideas in a critical manner. Those who had an ending mainstream management philosophy felt, in spite of the course content, their experiences justified or at least served as explanations of why capitalism was a good system and needed very little criticism. Those with a critical management philosophy that was affirmed by the content, experienced a validation of their past experiences and acquired a language to articulate their philosophy. The participants used the course content either to justify a mainstream management philosophy or affirm a critical mainstream management philosophy based on their prior educational and life experiences. However, some participants who began with a mainstream management philosophy moved to a critical management philosophy. They did this because they were able to view the course content in a manner that allowed them to enlarge their past educational and life experiences to integrate a more critical perspective into their management philosophy.

The interaction of the learner’s past educational and life experiences with the course content is important in understanding the participant’s development of their ending management philosophy. It affected how much they were willing to consider the critical point of view presented in the course content as well as how willing they were to engage in the class beyond fulfilling the requirements for a grade. Some ways the participants interacted beyond the course requirements were by “asking questions of themselves,” “doing additional reading” beyond the
course requirements, sharing knowledge with others who were not course participants, and applying the information to their personal life situations.

Role of Process

The role of the process involved the interaction of the learner and the instructor as well as the interaction between the learner and others. These two interactions or elements that emerged as a response to the second research question are designated as (a) the role of the instructor, and (b) the role of discussions. The following section will discuss each element and within each element, I will group the discussion according to the ending management philosophies.

Role of the Instructor

In all classroom situations, there is an interaction between the learner and the instructor. Carl, the instructor at UK University is a white male, originally from New Zealand, in his early 30s. He was enthusiastic about teaching this course on Critical Management. Some of his scholarly work has focused on the philosophy of management and the use of deconstructionism to critique the concept of entrepreneurship. At our first meeting he mentioned the resistance that he had encountered from some of the learners at the beginning of the semester. Frank, who was the instructor at Southeastern USA University, is a white male in his early 50s. While he was passionate about the need to discuss critical concepts in the field of accounting, he also expressed concern about the “dark side” (Brookfield, 1994) and the potential impact on a learner’s career if they focused on the critiques of accounting. One area of his scholarly work focused on the issue of integrity in the field of accounting.

Both Carl and Frank used a certain level of critical pedagogy in their attempts to engage the learners in expanding their understanding and viewpoints for thinking about management in a critical manner. Discussion was a primary pedagogical instrument. In the PhD seminar at
Southeastern USA University, the small class size of four learners easily lent itself to the discussion format. In the course at UK University, a large group discussion was part of the group presentations. In addition, Carl engaged the learners in the small group discussions that he hosted as part of a group’s preparation for their presentation. Both indicated that they tried to be as neutral as possible in their input into the class discussions, even presenting positions that were not their own, and that one of their roles was to keep the discussions on track and engaged with the substantive issues. However, overall neither course instructor was concerned with the explicit use of critical pedagogies and this was one area where the hierarchical nature of the learning dynamics was most evident. For instance, neither of them indicated an awareness of the fact that there were power dynamics that needed to be addressed that were part of the educational process or the discussions.

The participant’s shared Sharon’s assessment of the instructor as someone who has “got that expert power.” Yet, at the same time that the instructor was viewed as the “expert” on the subject, the participants also felt the instructors did not try to get the learners to regurgitate the instructor’s views on the course content. In fact, in contrast to their other courses, the participants felt strongly that the instructors encouraged the students to develop their own opinions and beliefs about management. From the participants’ point of view, this freedom to develop their own opinions and views was an important aspect of the class. The instructor’s expectations, as well as the course content and discussions helped the learners to develop their management philosophies. The participants felt that this course was different because the instructor encouraged the learners to think about, articulate, and voice their own opinions and provided the students with “more freedom to think” and was “more encouraging of your own thoughts.”
Mainstream Management Philosophy Affirmed.

Lucy felt that the instructor intentionally designed a course that was “disjointed” but in a way that helped her learn. She mentioned, “he knew that there would be lots of disjointed ideas that we would have trouble fitting together. That there would be diverse people working together where you get this assignment that seemed simple at first and got more difficult.” Sharon described the instructor as someone who had knowledge that might have some value as she explained that he is the lecturer and I thought, well, maybe he’s got a point there. We look up to him and say, “he knows what he is talking about, obviously, he’s the lecturer” so that gave me another perspective on it. And because he has done so much work on it.

Only Sharon noted that her CMS course “lets me explore my own views whereas the other modules don’t really ask for your opinion as much as this one does.” Heather’s experience was that neither criticism nor discussion was allowed in management courses. Therefore, the instructor was unable to offset her stance through any attempts to foster the learners’ voice. Neither Trent nor Lucy mentioned that learners were encouraged to form his or her own opinions. These participants did not need to develop their voices; the dominant view of management had already given them a voice.

Moving to a Critical Management Philosophy.

John viewed the instructor as an expert, someone who could help him to see things in a new way. He thought the instructor was “quite an intelligent guy and he helps you to see things in a new way. I do quite like his style of teaching; he encourages us to ask questions about ourselves.” The instructor was instrumental in helping John move to a critical management philosophy.
Daniel felt that the instructor’s course design invited the learners “to think, it's invited us to have our own opinions and give our views on certain issues which are not just applicable in terms of management, they’re applicable in terms of ourselves, our own lives.” It was important to Daniel that not only were his opinions valuable but they were relevant to his own life. John did not directly express the value of having the opportunity to develop his own voice, however, being able to share his views and hear the views of others in the discussions was a strong element of his learning experience.

Critical Management Philosophy Affirmed.

Edward talked about the results of the small group meetings and the impact of the instructor’s expert opinions on their presentation.

During the discussion with the instructor, I think he is a kind of – I don’t know what word is sufficient, he explains, he is good in interpretation. And while talking with him, we have some discussions, discussions in the small groups…for example, the first meeting, we had different opinions. Once we talked with him, we changed some of our opinions, which meant we saw our weak points, and we saw our strength points, as well. We kept our strength points, we corrected our weak points, and that means we learned something from him.

Rosemary noted that the instructor “is very good and he is interesting and he knows the information out there really well and he really helps you kind of steer in the right direction.”

In addition, these participants valued the encouragement to develop their own voices as an essential element of the course. When Edward was comparing this CMS module to his other modules he said, “in this module, we were asked to think, we were asked to develop ideas, opinions, which we cannot find in any sources or any other places, the only way is to think about
it.” Rosemary acknowledged that the instructor had a lot of knowledge and even steered the students “in the right direction.” However, the participant’s perception was that the direction given occurred in a manner that allowed the learner to develop his or her own opinion. As she pointed out, the instructor

Without trying to tell you what to think, you know, he lets you come up with your own ideas. He is kind of back there watching, but he can steer you in the right direction and once he figures out what you are talking about, he can just move you without changing your ideas.

Gary commented on the instructor’s role in helping students to think about and support their conclusions,

with this critical perspective, it has given you more freedom to think, to think that you’ve got this theory but, there’s a big but sometimes, what led up to it? So, it is totally different in the sense that… Secondly, it is more encouraging of your own thoughts because there are no really right or wrong answers; it’s more about being justified, particularly with this one, the critical perspective, because it is your own perspective.

These participants viewed the instructor as the expert. In addition, they valued the instructor’s ability to encourage them to find and articulate their own voice. This interaction with the instructor was instrumental in affirming their critical management philosophy.

Summary.

These examples demonstrate that while the instructor was viewed as the “expert” about the course content that there is a relationship that occurred between the instructor as expert and the learner’s ability to develop their own views and beliefs as their management philosophy developed. Even those students who came into the course with a critical management
philosophy, viewed the instructor as the expert about the majority of the course content presented. It was from this position of expert power that the instructor pushed the learners to develop their own opinions and views on the material and concepts. Those who experienced an affirmation of their mainstream management philosophy did not necessarily value the ability to develop their own voice. The participants who moved to a critical management philosophy valued the development of the learner voice as an important part of their learning experience. However, those participants who experienced an affirmation of their critical management philosophy considered the opportunity to develop their own voice as a very valuable element in strengthening their philosophy. They also experienced this class as a space where their voice was sought and valued. Those participants who ended the course with a critical management philosophy valued the freedom to develop their own opinions and voices more than those participants who only experienced an affirmation of their mainstream management philosophy.

\textit{Discussions – Inside and outside of the classroom setting}

John used the term “collective learning” to describe a learning dynamic that involved discussions, both inside and outside of the classroom. This learning allowed the learners to engage in discussions where, as Daniel pointed out, they could experience “an opening in my mind that not everyone thinks the same way.” Both participants who moved toward a critical management philosophy and all but one of the participants whose critical management philosophy was affirmed discussed the dynamics of collective learning that occurred during the discussions. However, only two of the four participants whose mainstream management philosophy was affirmed talked about the value of the discussion in their experiences.

While the participants viewed the discussions as part of the collective learning that fostered the development of their management philosophy they also raised questions about the
type of participation that favored the dominant learners over those who were disadvantaged especially in terms of their English speaking skills. The experiences of this collective learning through discussions will be discussed in terms of both the positive and negative aspects of the discussions that resulted from the learners engaging in the discussions.

*Mainstream Management Philosophy Affirmed.*

Those participants who experienced the course as an affirmation of their mainstream management philosophy described the discussions only in passing as “fun.” Trent talked about “they are really starting to get into it.” Heather, who began and ended with a mainstream management philosophy, came into the course with not only a total lack of experience in thinking about a subject in critical terms but prior experiences strongly discouraged any type of criticism. She emphatically stated, “All of my courses were strictly business. So, we were not supposed to discuss things.”

Lucy talked about how the instructor “knew that there would be lots of disjointed ideas that we would have trouble fitting together and that there would be diverse people working together where you get this assignment that seemed simple at first and got more difficult.”

Sharon’s view of the discussions was that

I was quite surprised, and I thought a lot of people were coming out with really trivial stuff, and that’s not even important, you know, there are more important things to discuss. Think about it, some people seem to be going down this narrow tunnel. So, I was quite confused about all that. You don’t have to limit yourself.

These participants focused on the discussion and course content primarily as a place to gain new information and facts.
In terms of the lack of participation in the discussions by the majority of the learners, only two of the participants with an ending mainstream management philosophy mentioned this. Sharon pointed out “there’s a couple of those who speak out, not everybody speaks out.” In addition, when relating how she could have learned more during the course, she said

I think shutting up more often because I know there is a few of us that have always got our hands up and have something to say. So, I think maybe taking bit of a step back. But then, again, I think if some of these people hadn’t instigated the discussion it wouldn’t have gotten to this level.

Trent also noticed this tendency for only a few of the students to join in the discussion. “There are a few of us that talk and lots that don’t and at first people are shy but when everybody knows everybody, which they do now, it’s better.” Overall, these participants felt that the participation level of the discussions was acceptable and did not view the lack of participation outside of a core group of learners as problematic.

Moving to a Critical Management Philosophy.

Both John and Daniel, who moved to a critical management philosophy, experienced the discussions as important. Daniel mentioned,

I just think discussing that with other people in my group and just seeing sometimes the differences in opinion, that that’s “just the way it is” or people who share the same opinion, “that’s terrible.” And I think that I was able to learn that and see other people’s reactions to it…. I think people’s reactions were the greatest thing, an opening in my mind that not everyone thinks in the same way.

The realization that not everyone thinks the same gave him permission to look at management and capitalism in a different way. This helped him to develop a new way of looking at the world
and management in particular. As he endeavored to understand management in the light of the discussions in the course, it moved him to a critical management philosophy.

John experienced the course as a “collective learning” process. Not only were his experiences and thoughts important, but those of his classmates, shared through discussions, also contributed to his learning in a significant way. John’s discussions with his classmates were an important new source of learning for him – as he explored his knowledge and experiences in a collective capacity. John talked about his learning experience:

It wasn’t learning as in you read a textbook and you remember the module. It wasn’t that sort of learning. It was like collectively we were sort of realizing and questioning and…it’s not the sort of learning that has happened too much up until now.

He felt that “collective learning” was important because it involved “just different people [who] see things [in] different ways.” He expressed his sense of collective group learning as “I think as a group, we started to question our own standpoints.”

The experience of gaining a new lens with which to view the world was so meaningful to John personally that he wanted to share this knowledge with his other friends, even those friends who did not attend the University:

I feel I’ve learned to look at things in a new way, a different way. And I find myself going out with a lot of my friends who don’t go to the university, they’re plumbers and carpenters and I’m still good friends with them. I’m trying to get them to look at things in a different way as well. Because I think, it has great meaning to me, a great value to me to be able to look at things in this way and I want them to be able to…So I try to get them to look at things in a different way.
John talked about the low level of participation by most of the learners but did not view it as problematic. He attributed this low level of participation in the discussions to be the result of the learner’s personal decision rather than the result of a systemic problem that favored native speakers over non-native speakers. As he explained,

in our group discussion at the end when the questions arrive, there’s only a few people who usually talk, a lot of people try not to say anything because they are shy or not understood or some people just don’t like to speak out in front of other people.

*Critical Management Philosophy Affirmed.*

Those participants who experienced an affirmation of their critical management philosophy valued the discussion as the most significant interaction that influenced their learning. The discussions, both the small group discussions with the instructor and the class discussions, opened the participants to different opinions.

Discussions were an important learning tool for Edward, “I mean, in the lectures, it is kind of different but when you have a discussion with a person face to face, you can understand something more about his attitudes. I think experiences are important and these are experiences that I will remember in the future.” Another aspect of the discussion that was important for Edward was the benefit that came with having different cultures in a learning environment. He explained this as,

since it’s a kind of international environment, it is good to learn different cultures, different people’s opinions about the same issue because the capitalism and globalization, those are almost the same all over the world. For example, Chinese people may view a different kind of response than in England or in your country. That’s the first thing that I
can say. I experienced a different culture’s response about that issue. It was helpful…. and that reinforces us to read and think about the issues.

This reinforcement occurred in the discussions and helped to affirm his critical management philosophy.

Rosemary also valued the discussions among the students noting that the learners were willing to engage in discussions with each other both in and outside of the classroom, she felt that we are varied enough so that, you know, at least a couple of us have such drastically different ideas of the ways things should be. I think it is really interesting when you get those ideas together and see what comes out of that. And I really got a lot out of that; I really got a lot of the new perspectives on it.

For Ann, the discussions were the most important aspect of the course; her experience of taking this course was that

it’s opened my eyes to more things. I learned things here that I couldn’t learn in books. That’s the difference. It doesn’t matter how many papers you read on this stuff, but having discussions about it is what makes it real and makes you get it. You can’t read it and get it. You have to read, too, but you can’t read and get it alone.

Gary viewed the conversations with others as “something I’ve learned.” He explained

I’ve had conversations, like I’d sit in the coffee shop and talk about the critical course, you know. A lot of people use metaphors, what does he actually mean…the critical course in general, you kind of learn, you kind of got to know other people’s point of views and I think that’s something I’ve learned. Because talking to people you kind of get to know; I’ve sort of learned something in everything.
Some participants viewed the discussions as a tool for moving from the lectures to practice. Gary explained “the encouragement of conversations in the class… It just helps you learn basically, helps you think, helps you put what is happening in the lecture into practice and that’s quite difficult.”

David was the only participant in this group who did not talk about the discussions as an important factor in his learning. His focus was on the readings and the paper that he was writing and how the course and paper intersected with his past experiences. In general, however, these participants experienced the discussions as an affirmation of their original critical management philosophy.

Two of the participants noted the lack of participation by most of the class members. While Edward felt that the discussions were a very important element in the learning, he had a critical view of the learner participation in the discussions that favored some learners over others. He informed me that

I don’t know if you know this or not, but everybody is not talking in class. Some of the people feel comfortable to talk among others. And I don’t know if you noticed or not, but…mostly the natives are talking in the class.

Gary also pointed out that learner participation was limited to a self-selected group of students:

We’re always learning something in critical perspective, that’s why I like to talk in the lectures. You probably notice that in the group of four or five of us we are always talking. That’s a kind of social group and we are always in the coffee shop, we are always bantering each other. What often happens is that we are sitting in the lecture room and it is personal banter but it is related to the course, I’ll say something and somebody else
will say, “Yeah, but what about this?” and I’ll say, “Yeah, what about this?” and personal banter becomes part of the lecture.

Summary.

These examples illustrate that overall the participants viewed discussion as an important learning tool. The discussions were important not only because an individual learner was allowed to articulate their own views but because they provided a way for learners to hear from others about their own views and experiences about the topic. The collective learning that occurred during the discussions was another factor that was valued in the process of either affirming their beginning critical management philosophy or moving them to a critical management philosophy. However, those participants who experienced an affirmation of their mainstream management philosophy did not really value discussions as a learning tool.

At the same time that the UK University participants were explaining the importance of the other person’s views in a discussion they were also well aware that in actuality there were only a handful of students who participated in these discussions in the classroom. Five out of the eight UK participants felt that this disconnect was important enough for them to point it out to me in the interview.

The dynamic that restricted participation of some of the learners was discussed by many of the participants yet it was at odds with their other comments about the importance of discussions to their learning. Based on my notes from three class observations I found that indeed there were only a handful of students engaged in the discussion each week. There were 66 learners in the class at UK University, but the total number participating during each class ranged from 11 to 20 students or about a third of the class. Most of those students participating were native English speakers. On average native speakers engaged in the class discussions for 78% of
the time although they represented only 45% of the class membership. For two group discussions the native speakers monopolized the discussions.

John talked about “collective learning” and felt it was important because “different people” see things in “different ways.” Edward pointed out that for him “The most important thing is different cultures response. You are experiencing what kind of cultures gives what kind of response to the issues. That reinforces us to read and think about the issues.” Finally, Ann pointed out “having discussions about it is what makes it real and makes you get it.”

It is important to note the instructor’s assessment of the discussions. The instructor at UK University talked about the fact that only a handful of learners were engaged in the large group class discussions. Carl pointed out that only one female was a regular participant of the class discussions. There was no mention of the fact that those who participated were also white and native English speakers. From the instructors’ point of view, the fact that only a small group of students participated indicated that the primary problem caused by an individual learners lack of engagement with the course. There was no acknowledgement of an underlying power dynamic that were privileging some learners over others. In other words, the instructor did not see it as a power dynamic that needed to be talked about and even intentionally shifted in order to create space for other learners. Their ideology about capitalism and society did not quite translate into the educational dynamics that were occurring in the classroom. If the discussions are an important factor in the development of the learner’s management philosophy then this brings up two questions. What learning is occurring with the students who are not actively engaged in the discussions? In a CMS course where one of the premises of CMS is to bring unheard voices into the forefront, what implications does this contradiction have on the learner’s ability to learn about critical management ideas?
Summary – Role of Process

The role of process in the development of the learner’s ending management philosophy included two elements. These elements were the role of the instructor and discussions. The participants whose mainstream management philosophy was affirmed viewed the instructor as an expert but did not value the opportunity to develop their own voice. The discussions were only a peripheral aspect, a place where they had the opportunity to articulate their mainstream management philosophy. The participants who moved to a critical management philosophy valued both the discussions and the encouragement of the instructor that enabled them to develop their own opinions. They regarded the status quo of the learner participation as being somewhat problematic although they attributed the problem to the individual learners. Finally, the participants who experienced an affirmation of their critical management philosophy viewed the instructor, as an expert who could guide them and provided them was opportunities to articulate their opinions. They also valued the discussions for their contribution to their learning. In terms of learner participation, they felt that it was problematic. They also believed that it was a systemic problem and not a problem of any particular learner.

Chapter Summary

This chapter looked at the findings for the second research question. This question explored the factors contributing to the development of an adult learners’ management philosophy in a CMS course. The two primary themes were the role of content and the role of process in the development of the participants’ ending management philosophy. Within the role of the content, there were two important elements, the learner’s prior educational experiences and prior life experiences that acted as a catalyst between the content and the philosophy. For the
theme of the role of the process, two elements served as a catalyst. These two elements were the role of the instructor and discussion both inside and outside of the classroom.
CHAPTER 6
SUMMARY, DISCUSSION, AND IMPLICATIONS

The philosophies, experiences, and learning described by the learners in this study support previous findings from the literature in both adult education and critical management education. At the same time, they also challenge ideas about the role of experience in education and shed new light on the experiences of adult learners and the development of their management philosophy in a Critical Management Studies (CMS) course. This chapter will begin with a summary of the research design and findings followed by a discussion of the main conclusions. Finally, I will conclude with implications of this study for practice and further research.

Summary of the Study

In order to inform the practice of those who teach from a critical management perspective, it is important to understand the experience of the learners in CMS classes in terms of the development of their management philosophies. In view of that, the purpose of this study was to understand how CMS courses affect adult learners’ management philosophy.

A qualitative research design was used as a vehicle for understanding the interactions of the learners with the course and the ways that these interactions were instrumental in the construction of their management philosophy (Merriam, 1998). The research was conducted at two sites, one in the United Kingdom and one in the United States. The U. K. course, focusing on critiquing management and capitalism, was part of a Master’s in Management programme while the U.S. course was a PhD seminar on Critical Accounting. Eleven learners were
interviewed for this study. The sample consisted of eight learners from the U.K. site and three learners from the U.S. site.

Two research questions guided this study:

1. How do CMS courses affect the adult learners’ management philosophy?
2. What factors in a CMS course contribute to the development of the adult learners’ management philosophy?

I began each interview by asking the participants to share some background information related to their work and educational experiences. The interview was divided into three sections. The first and third sections focused on seeking to elicit the participants’ ethical views about a topic, their perception of how a critical manager might view that same topic and how the course had influenced their understanding of the topic. For the first section, the topic was related to a classroom discussion and the third section focused on a personal managerial experience supplied by the participant. The second section explored a personal learning experience of each participant that resulted from the critical course. Analysis consisted of using manual procedures to annotate, code, sort, and present the data (Bogdan & Biklen, 1998; Maykut & Morehouse, 1994; Merriam, 1998; Patton, 2002). Use of computer software was limited to the “Find” and “Comment” capacity of WORD.

A number of findings emerged in response to the research questions. The first finding answered the question “How did the CMS course affect the learners’ management philosophy?” The study showed that learners entered the course with different management philosophies. The learners beginning management philosophy was categorized as either mainstream or critical. Six participants began with a mainstream management philosophy. Over the course of the semester, four of these participants experienced an affirmation of this beginning philosophy, while two of
the participants moved to a critical management philosophy. The other five participants began
the course with a critical management philosophy and because of the course experienced an
affirmation of their critical management philosophy.

The findings that emerged in reply to the second question focused on the factors that
affected the development of the learner’s ending management philosophy. Two primary factors
developed. One primary factor that influenced the development of a learner’s management
philosophy was how the participant linked their prior educational and life experiences to the
course content. The participants used prior experiences as a guide for the usefulness and validity
of the course content to their personal situations. This factor influenced how much the
participants were willing to consider the critical point of view presented in the course content as
well as how willing they were to engage in the class beyond fulfilling the requirements for a
grade.

The second primary factor was the role of the course process in the development of the
learner’s management philosophy. Two elements of this factor were the role of the instructor and
the role of discussions, both inside and outside of the educational setting. The interaction of the
learner and the instructor is important in an educational setting. While the instructor was viewed
as an “expert” by almost all of the participants, it was the instructor’s ability to encourage the
learners to develop their own opinions and beliefs about management that was instrumental to
the participants. In contrast to their other management courses, the participants felt that the
instructors did not try to get the learners to regurgitate the instructor’s “expert” views on
management and business. Instead, they felt that they were encouraged to think about, articulate,
and voice their own opinions. However, the participants who either moved to a critical
management philosophy or had their critical management philosophy affirmed valued this aspect
more than those who experienced an affirmation of their mainstream management philosophy. Those who experienced an affirmation of their mainstream management philosophy had already been given a voice in other management classes. For those with a more critical view, this was an opportunity to explore their thoughts and doubts about the “theory versus reality” dichotomy of management and business.

The second element was the discussion that occurred both inside and outside of the educational setting. This discussion was an element that most participants found useful in helping them engage with the course. The participants felt that it provided them with other viewpoints that sometimes challenged and sometimes affirmed their own philosophies. Those who experienced an affirmation of their mainstream management philosophy viewed the discussions about the course content as a way to gather information and to be part of a course that was different from their other management courses. Those who moved to a critical management philosophy viewed the experience of the discussions and the different array of viewpoints that were presented as a vehicle for them to begin to think about and articulate their own sense that management contained some important “theory versus reality” issues that they were now free to explore. For those whose critical management philosophy was affirmed by the course, the discussions along with the instructor’s role in encouraging an exploration and articulation of the learners’ own points of view, gave them permission and created a space where their voices could be heard. However, because of the relatively traditional pedagogy that supported a critical content this space was smaller and more problematic than if a more critical pedagogy had been used.
Conclusions and Discussions

This section will discuss the three primary conclusions centered on the themes of course impact, learning and development factors, and critical content versus critical pedagogy. These conclusions are:

1) A CMS course can impact learners’ management philosophy in multiple ways within the same course.

2) The outcomes from a CMS course derive from the intersection of course content, course process, the instructor, and the learners’ prior experience and identity.

3) There can be a contradiction between the use of course content and a pedagogical process in a CMS course.

The following discussions are clustered around these conclusions.

Course Impact

The first conclusion of this study is that CMS courses can impact a learners’ management philosophy in multiple ways within the same course. As shown in Chapter 2, while there have been lively discussions about the importance of CMS courses and their perspectives in management education (Alvesson & Willmott, 1992, 2003; Caproni & Arias, 1997; Cavanaugh & Prasad, 1996; French & Grey, 1996; Reynolds, 1999a, 1999b) there has been no research that has assessed the impact of CMS courses on the learner’s management philosophy. This study addresses that gap by examining the impact of CMS courses on the development of the learners’ management philosophy and the factors that contribute to that development.

The adult education and higher education literature both recognize that learners and educators enter a critical course invested in some position in relationship to the critical agenda (Ellsworth, 1989; Johnson-Bailey & Cervero, 1998; Kumashiro, 2002; Tisdell et al., 2000).
Ellsworth (1989) found that not only educators but also learners bring their own political perspectives into the educational setting. However, the implicit assumption, especially in the critical management education area, has been that the instructor brings a critical perspective while the learners bring a more mainstream management philosophy (Alvesson & Willmott, 1992, 2003; Reynolds, 1999b; Nord & Jermier, 1992). The focus is on the teacher as the expert who can clearly articulate for the learners the existence of different perspectives that are contained within the assumptions of management and organizations (Grey & French, 1996). This assumption of the teacher as expert assumes that the learners are unaware of different perspectives and that they have accepted without question most of the underlying assumptions of capitalism. However, as this study pointed out, some learners entered the educational setting with critical management perspectives. They may or may not be able to articulate their critical perspectives in the language of the critical theorists but they are well aware of the power relationships that exist and the flaws in the system of capitalism and management. The participants in this study spoke of the CMS course as showing them the real world of business as opposed to the models for success that they were asked to apply in their other courses. The CMS literature has suggested that managers are not homogeneous and in fact work within fragmented identities based on various organizational and social divisions (Parker, 1997); are themselves managed by others (Watson, 1997); have the capacity for moral agency (Watson, 1994) and finally that critical management education may have an emancipatory effect on some managers (Fournier & Grey, 2000). This study further supports the literature that focuses on the fragmented identity and position of managers as opposed to treating them as a homogeneous group. Some participants in this study brought experiences to the classrooms that were weighted toward the “good” of capitalism. The result of the course was that it affirmed their mainstream
management philosophy. Others entered the course with experiences that reflected their beginning critical management philosophy and understanding that other values besides profit needed to be considered in business. The CMS course affirmed this critical management philosophy. While still other participants were able to bridge their previous “capitalist-oriented” experiences and mainstream management philosophy moving to a critical management philosophy.

Scholars writing about the use of critical content in a CMS course have suggested that resistance is to be expected (Cavanaugh, 2000; Reynolds, 1999b) and it has been suggested that managers accept or resist the critical content based on how it applies to the learner personally (Nord & Jermier, 1992). Even those writing from a critical perspective in higher education have stressed the resistance that occurs in anti-oppressive learning contexts (Kumashiro, 2002). This study revealed some resistance to the course content, one participant in particular resisted throughout the course. Those participants who began with a critical management philosophy readily accepted and even welcomed the course content. While Nord and Jermier (1992) may be correct that job dissatisfaction may play a role in the learners willingness to engage with the critical content, I found that it was the sum of the learner’s prior life and educational experiences that was a significant factor rather than just job dissatisfaction. I think the findings support the premise that resistance is to be expected given the critical nature of the course content. Some of the participants were resistant to both the course content and process. Heather was the most vocal about this, continuing during the entire course to challenge the inclusion of this content in a management programme and also refusing to engage in the discussions because they had been forbidden in past educational experiences.
Transformational learning as characterized by such adult educators as Freire (1970) and Mezirow (1990) postulates that learning results in dramatic and fundamental changes in our worldviews or philosophies of society and our role in it. Mezirow (1990) contends that through critical awareness, adults’ will chose “more inclusive, discriminating, permeable, and integrative perspectives” (p. 14) as the superior perspective. However, the findings of this study revealed that change is not likely to occur in a CMS course. According to this study, only two of eleven participants experienced a change in their management philosophy. For the other nine participants, whether they began with a mainstream management philosophy or a critical management philosophy the impact of the course was to affirm their beginning philosophies.

If the purpose of education is to change the behavior, attitude, or beliefs of learners than these classes had little impact. In fact, my original hope for this research was that I would find that the CMS course would make an impact on all the learners in the direction of movement toward a critical management philosophy. If the purpose is to engage the learners to think critically about their underlying values and assumptions around the issue of capitalism, then the class had a major impact on how the participants viewed themselves. Even those whose mainstream management philosophy was affirmed thought about the content presented in the course. Most of the participants did not change their management philosophy but instead found that the course “affirmed,” “reinforced,” or added “clarity” to their original worldviews. Only two participants experienced the course as changing their management philosophy. Therefore, a change that most critical educators hope for only occurred in two participants. What is important is that five of the participants entered the course with a critical perspective and the course affirmed their philosophy and in some cases, gave them language to articulate it.
The findings of this study suggests that a CMS course impacts learners in multiple ways in terms of the way that they view management and their philosophical orientation to it. In the analysis of the change in a learners’ management philosophy, I established that there were four possible directions that the learners could move. Two of the directions represented an affirmation of their original philosophy: mainstream management philosophy affirmed and critical management philosophy affirmed. The other possible directions were that a learner could move from a mainstream toward a critical management philosophy or move from a critical toward a mainstream management philosophy. My analysis revealed that participants either were affirmed in their original philosophy or that there was a movement toward a critical management philosophy.

The one direction that was not present among the participants was a movement from a critical management philosophy to a mainstream management philosophy. One participant, Edward, experienced a dilemma between the mainstream management philosophy that espoused an ideal of a “professional” who “maximized shareholder profits” above all else and his family values that placed other considerations, especially the employees above the profit motive, which portrayed his critical management philosophy. Yet, he was willing to appear unprofessional before he was willing to give up his value that money was not the only goal of business. Prior experiences were the key that prevented the participants from moving from a critical management philosophy toward a more mainstream management philosophy. All of the participants with a critical management philosophy related experiences where they made an ethical decision in a business context. In all cases, their choice was to choose less profit in favor of some other value. Against their personal experiences, a mainstream management philosophy, even one with an ethical stance, did not accurately reflect their values.
Learning from experience has been an important part of adult education models (Jarvis, 1987; Kolb, 1984; Mezirow, 1991; Miller & Boud, 1996). Some have suggested that unique past experiences are instrumental (Boud & Walker, 1990, 1992) while others have discussed that past experiences are retold in the learning experience and then integrated at a different level (Bateson, 1994; Usher, Bryant, & Johnston, 1997). This study extends the focus of experience to encompass and reinforce the importance of prior experience as a contributing factor in the development of the learners’ management philosophy. In contrast to the previous literature about current learning experiences and their usefulness in helping the learner to achieve a different worldview or philosophy (Freire, 1970; Mezirow, 1990), this study found that while current experiences were important to the learners’ development that it was the prior experiences that affected the development in different directions.

The findings of this study suggest that the learner’s prior life and educational experiences were instrumental in shaping the way that the learner interacted with the course content. Those who experienced an affirmation of their original mainstream management philosophy did so because their prior experiences outweighed the new information and knowledge presented in the course. The participants experiencing an affirmation of their critical management philosophy felt that their prior experiences were affirmed and articulated by the course. Those who moved from a mainstream management philosophy to a critical management philosophy also used their experiences when assessing and incorporating the course content. However, in this instance, they chose to reinterpret their experiences in light of the critical course content presented. The course process also facilitated this reinterpretation and the development of their management philosophy.
Learning and Development Factors

The outcomes from a CMS course derive from the intersection of course content, course process, the instructor, and the learners’ prior experience and identity. Educational researchers have placed the educator at the center of the consciousness-raising activity in a critical educational setting (Ellsworth, 1989). The findings of this study suggest, however, that the educator is only one aspect of the learning process that facilitates the development of the learner’s worldview or philosophy. From a humanistic orientation, the learning process takes precedence over the content (Cross, 1981). However, a critical educational focus is distinguished by the importance placed on the critical nature of the content, especially in terms of helping learners to understand the historical and socio-political aspects of power and society (Ellsworth, 1989; Freire, 1970; Giroux & McLaren, 1987; hooks, 1994; Reed & Anthony, 1992; Reynolds, 1998). Learners’ experiences in an educational setting consist of their interaction with the content but also are reflective of the processes that are occurring (Ellsworth, 1989; Kumashiro, 2002; Reynolds, 1999b).

Course process refers to social structures, educator-learner relationships, and procedures that are part of the course (Reynolds, 1999b). Based on the findings of this study it also includes the interactions between the learners. The findings show that the development of the adult learners worldview or philosophy is found at the intersection of the learner’s prior experiences, the course content, the instructor, and the course process.

Within traditional academic settings, the assumption is that it is the professor who controls and shapes the environment more than the learners (Ellsworth, 1989; Johnson-Bailey & Cervero, 1998). Liston and Zeichner (1987) position the role of the instructor in critical pedagogy as helping students to identify and choose between distinct moral positions. Within the
critical management education literature the role of the instructor is portrayed as an expert who can clearly articulate for the learners the existence of the underlying assumptions of management and organizations while providing critical lenses to examine these assumptions (Grey & French, 1996). It has also been suggested that the objective of critical management education is to equip learners to form their own judgments and make their own connections to real-life issues (Cavanaugh & Prasad, 1996). This objective stresses the need to provide learners with different critical perspectives but the assumption here is that the educator seeks only to supply new information without having any bias of their own about the affect of the learning toward a particular change in the learners’ management philosophy. In this case, there is no emancipatory element or focus on how the learner might facilitate a more democratic management practice. There is also no recognition that the educator occupies a place of positionality that is important to the power dynamics and therefore the learning (Johnson-Bailey & Cervero, 1998). As mentioned in the findings in Chapter 5, the instructors did not acknowledge the underlying power dynamics that privileged a small group of learners who engaged in the class discussions. While Carl, the instructor in the UK, mentioned that those who participated in the discussions were male, with the exception of one female learner, there was no awareness that the participants were also white and native English speakers. There appears to be a substantial disconnect between the theory espoused by the instructors, which critiques power and privilege in management, and an application of this theory to the real life of the classroom. This is an important disconnect because this contradiction has implications for the learning that is occurring in the CMS classroom.

The findings of the study suggest that the learners viewed the instructor as an expert. Those whose mainstream management philosophy was affirmed felt that this was reason enough
to listen to what he had to say even if they did not agree with him and that he did have something to teach them. For those from a critical perspective, the instructor as expert, added validity and substance to the new knowledge affirming their own critical perspective. This study supports previous findings that the positionality of the educator, including the perception of “expert” is a primary component that accounts for the learning that occurs (Johnson-Bailey & Cervero, 1998). The positionality of the instructors in this study was white and male. This had an effect on the learners’ perception that the instructors were the “experts.” For instance, those participants whose mainstream management philosophy was affirmed were at least willing to hear what the instructor said. While they muted the course contents, to some degree, because of the positionality of the instructor they did not dismiss the new knowledge entirely. This is in contrast to the findings of three women instructors of a CMS course who found that teaching a course of this nature generated some disruptive consequences for them from both learners and colleagues (Hagen, Miller, & Johnson, 2003). This raises the question about the impact on this view of the instructor as “expert” if the instructor had a different gender or racial identity (Johnson-Bailey & Cervero, 1998). Based on previous research I can only speculate that this would have had an impact on the learners’ view of the instructor and perhaps on the development of their management philosophies. The study found that the primary benefit of the role of the instructor from the participants’ point of view was to encourage the learners to think for themselves and provide a space for them to articulate their own opinions.

It is sometimes assumed that self-reflexivity in a critical management course will lead to the learners broadening or changing their perspective (Caproni & Arias, 1997). However, this study found that self-reflexivity and critical course content are not sufficient in and of themselves to move a learner’s management philosophy from a mainstream management philosophy to a
critical philosophy. For those with a mainstream philosophy and strong mainstream experiences, self-reflexivity did not move these participants to a critical philosophy; it only served to affirm their original mainstream philosophy.

The use of dialogue has been problematized because it assumes that all members have equal opportunity to speak, and that safety and mutual respect are additional components of the dynamics for all learners (Ellsworth, 1989). However, power dynamics play a significant role in the learning environment and in turn over the ability of the learners to engage in the dialogue, which purports to privilege all voices (Johnson-Bailey & Cervero, 1998). Even the staple of adult educational techniques – discussion, both large and small group, is problematic because of the unequal power relations among the learners and the learner-to-educator dynamic (Brookfield, 2001). Another concept and technique is the learning community. The assumption is that it creates a more democratic and inclusive arena. However, it has been shown to be empowering to some while disempowering to others (Reynolds & Tehran, 2001; Rigg & Tehran, 1999). The notion that critical pedagogies, in and of themselves reduce or eliminate unequal power relations has been problematized in both the fields of adult education and critical management education (Ellsworth, 1989; Perriton & Reynolds, 2004; Reynolds, 2000; Reynolds & Tehran, 2001).

Critical Content versus Critical Pedagogy

An important aspect of program planning is the way a course is structured to achieve the educational objectives (Cervero & Wilson, 1994; Tyler, 1949). The key parts of the structure are course content versus course process. The debate in critical management education centers on the need for critical content and critical pedagogies (Perriton & Reynolds, 2004; Reynolds, 1997, 1999a, 1999b; Reynolds & Tehran, 2001; Rigg & Tehran, 1999). Specifically, are both needed or
what are the effects of using one without the other? The conclusion of this study is that there can be a contradiction between the use of critical course content and a critical pedagogical process.

The literature in the debate can be separated into a number of areas. Some focus on the introduction of a critical course content to management education with the implicit assumption that it will be delivered in a traditional process (Caproni & Arias, 1997; French & Grey, 1996; Nord & Jermier, 1992; Roberts, 1996). The traditional process can further be defined as Freire’s (1970) notion of “banking education” where learners are just vessels to receive the knowledge from the educator. While the lecture format is the main feature of this process, I think that discussions can also be used to reinforce the information rather than critique the knowledge and how it is produced. This has been noted because those who focus on the use of critical content may use discussion as part of the course process but without a discussion of the critical aspects of power and privilege that are inherent in either the dissemination of critical content or the learner discussions. It has been suggested that by using a critical process within the traditional content, learners, as managers will begin to challenge organizational assumptions and to act out of a sense of caring for others (Roberts, 1996). The assumptions here is that the framing and delivery are the keys. Again, a major technique is the use of self-reflexivity and dialogue about the individual manager and then to broaden these techniques out to the organizational level. Classroom dialogue is purported to model a world which recognizes the legitimation of the personal voice as opposed to organizational need in order to help learners to understand the need to moderate organizational goals in terms of individual ethical needs (Roberts, 1996). It has also been noted that educators are important role models in critical courses (Chan & Tracey, 1996). As Ellsworth (1989), pointed out dialogue in and of itself is not empowering. The myth of the power of helping students find their voices refuses to consider that learners have multi-
dimensional identities and positionality that interact with the other learners’ identities and
positionality in the learning process. As was pointed out in this research study, participants do
not all have equal access to the discussions for various reasons. Some of which may be related to
prior educational experiences, language barriers, as well as issues of race and gender. While race
and gender was not a specific aspect of this study, the majority of students who engaged in the
discussions during the class observations were male, white, and native-speakers. While some
native-speaking Anglo-Indians participated in the observed discussions, none of the Black
native-speakers choose to do so.

If critical educators are going to engage in the use of a critical process, especially in
management education, it must be recognized that the processes do not exist in a power vacuum.
Management education uses some tools that could be characterized as critical process. The use of
learning communities (Reynolds, 1999a; Rigg & Tehran, 1999) and experiential learning (Vince,
1996) are an example of two tools. In adult and management education, learning communities
are perceived to be places where the principles of a civil and democratic society are played out
and therefore the learning field is a level one for all (Pedler, 1994; Reynolds, 1997; Rigg &
Tehran, 1999). However, as Rigg and Tehran (1999), have pointed out this is not true. In
addition, experiential learning is another tool used in management education that promises to
help the learners learn.

“We believe that to teach a critical management education course in a conventional mode
of pedagogy is a contradiction in terms” (Grey et al., 1996, p. 102). The learners in my study
confirmed this in spite of the fact that it gave them more voice and freedom to develop their own
opinions. Clearly, the course content presented in the two classes that were a part of this study
was critical in nature. In both cases, the content attempted to address the unexamined
assumptions and representations of capitalism and management that operate in our society. It provided critical accounts of management theory and practice within various disciplines, including accounting, along with an introduction to various critical lenses to help the learners examine the theories and practices of management and organizations (Reynolds, 1999b). There was even an attempt to use a critical process in terms of asking the participants to be self-reflective and employing dialogue in the class discussions. In both cases, class discussion was a significant component of the course activities.

Scholars have spoken to the need for both critical content and critical processes (Brookfield, 1994, Giroux & McLaren, 1987; Perriton & Reynolds, 2004; Reynolds, 1998, 1999a, 1999b). The uncoupling of critical content from process results in a pedagogical simplification at best (Giroux, 1981). There are difficulties and real issues of power that are part of any educator’s decision to use and implement a critical approach in a management classroom. Whether or not there is an explicit discussion of the power dynamics that are part of the course process, learners are aware of them nonetheless (Johnson-Bailey & Cervero, 1998).

The study found that the participants recognized the existence of power relations within the classroom as illustrated by the finding of the study that five out of eight participants from UK University mentioned the lack of participation outside the circle of native-speaking learners. These imbalances of power exist whether we talk about them or not. However not talking about them presents a contradiction between a course content that stresses inclusiveness, power, and reflecting on management and organizations in a critical manner and a course process that not only allows the domination and power of society to continue but does not even address its ramification in the microcosm of the classroom.
Critical reflection results in some degree to disruptive consequences among the learners (Brookfield, 1994; Reynolds, 1999b). It has even been suggested that without some degree of intellectual disruption or disruptive consequences there is a lack of a true critical pedagogy (Kumashiro, 2002; Reynolds, 1999b). This disruptive learning is seen as not only ethical but also necessary in critical education (Felman, 1995). However, there were very little disruptive consequences for the learners in this study.

Implications for Practice and Research

There are some practice implications that can be developed out of the findings of this research project. It is anticipated that these findings will help educators to better understand the impact of critical courses, especially CMS courses, on the development of the learners’ worldview or philosophy. It can also provide an understanding of the dynamics that contribute to this development. While much has been written about the critical content and pedagogies in the field of CMS (Alvesson & Willmott, 1992, 2003; French & Grey, 1996; Reynolds, 1999b) no studies prior to this one, has studied the impact on the learner. The findings of this study can be used in management education, adult education, as well as corporate and human resources educational settings.

How could critical management educators or critical adult educators be better prepared through using this material? First, by getting the information developed from this research to them and helping them to identify ways to improve their practice of teaching critical courses. Most management educators are first and foremost, experts in their discipline and educators, second. These findings can help the educator to be better prepared in a number of ways. It is important for critical educators to realize that learners do not enter the classroom as blank slates nor do they only begin from a mainstream perspective (Ellsworth, 1989; Kumashiro, 2002). The
results of this study can be used in critical management education programs to help learners articulate their management philosophy, affirm those who begin from a critical perspective, while helping those who are open to a shift to move to a more critical philosophy. In addition, the findings of this study highlight the need for using critical content and radical pedagogies. Of special significance is the need for educators to help the learners address the issue of power and privilege that occur in any educational setting (Cale, 2001; Tisdell et al., 2000; Vince 1996). Another avenue for disseminating this information might be to restate the contents in a more popularized written format. While this study looked specifically at the development of a learner’s management philosophy, I think that it has applications in the development of a learner’s worldview using a critical perspective whether the context is management education, continuing management education or any other type of critical education.

Some educators have experienced teaching CMS courses as a challenge for the educator (Hagen et al., 2003). The finding of this study that learners enter with multiple perspectives and that both mainstream and critical perspectives are simultaneously affirmed heightens the challenge. However, assisting with this challenge is the learners’ use of prior experiences to validate and examine the material of the course content. Here the use of explicit assignments that help them to see the connection would be valuable. Assessment by the educator of the variety of prior experiences and beginning worldview of the learners would help the educator to facilitate the development process through encouraging the sharing of the stories of those learners who have a beginning critical perspective. Also understanding the importance of prior experiences might prompt educators to consciously and deliberately use these experiences to help the learners to build bridges from their experiences to the course content, as well as providing a space to critically deconstruct their past experiences.
Education is relational and this relationship is always composed of a struggle for meaning and a struggle over power relations (Cervero, Wilson, & Associates, 2001). This focus on power and privilege is also at the heart of CMS (Grey & Mitev, 1995). Therefore, the issues of power and privilege should be at the center of a CMS course. It is imperative to discuss the concepts of power as part of the course content, the power relations that occur in the classroom, in organizations, and the implications for challenging those power relations. Education that is critically informed becomes even more important as managers use power in less visible and more sophisticated ways in the age of empowerment (Hardy & Leiba-O’Sullivan, 1998). Another implication for practice is related to the discussion of power relations that are part of the course content in the abstract while linking that to the power relations that are part of the educational setting (Ellsworth, 1989; Vince, 1996). This study pointed out that whether discussed or addressed, power relations do in fact exist in the classroom and are recognized by the learners (Johnson-Bailey & Cervero, 1998). Ellsworth (1989) states that as educators we should disrupt the power dynamics, even if only on a temporary basis. However, we need to be aware that in disrupting power relations that it is also important to acknowledge and discuss the consequences. It is imperative to realize that power dynamics are not eliminated but shift. An analogy for disrupting power relations would be the turning of a kaleidoscope; new images or new dynamics appear. Learning can occur in looking at and discussing the shifts.

The findings from the study suggest that adult learners enter educational settings at different places in terms of their awareness about the systems of power and privilege that functions in society. They are also in different places in respect to their openness to engage in critical reflection of a political, historical, socio-economic analysis of society. The implications of this are that as adult educators, we are not necessarily the experts or the only ones interested in
exploring a critical worldview of management or society. It also means that there is a wealth of experience that the learners bring to the table that can be used to build bridges from prior experiences to the course content. Finally, the implications are that we as educators have an opportunity to open up the spaces of power and privilege, for learners who have experienced marginalization in the past. We can provide a space for learners who have entered the educational setting with a critical philosophy to further articulate their own voices. We need to be aware of how the hierarchy of power and privilege operates in an educational setting and critically reflect on ways to talk about and change the hierarchy in ways that allow for more inclusiveness.

Another implication is the dilemma presented about the resistance of learners to these types of courses (Reynolds, 1999b; Vince, 1996). One of the participants, Heather was resistant from the beginning to the very idea of this course as part of a management programme. She was very vocal about needing to understand the relevancy of the course. The instructor at UK University initially resisted addressing this issue. However, finally at a faculty/student meeting he was confronted with the necessity of addressing the relevancy issue. He did address this concern during the fourth class. While Heather did not accept his arguments, other participants commented that it helped other learners to engage with the course. Addressing this concern is not mentioned either explicitly or implicitly in the literature but is a legitimate request by the learner. However, as Heather illustrates, addressing the relevancy concern does not mean that all learners will now welcome a critical discussion. The educator needs to be concerned by the limitations and tensions created between a genuine need to discuss the relevancy, especially in management education courses, and recognizing that some learners will not accept or agree with any reasons
put forth. The question that must be wrestled with, from the educators’ point of view, is when is a learner’s concern a genuine relevancy issue and when is it resistance?

Critical management studies have been criticized for its lack of application to the real world of management (Fournier & Grey, 2000; French & Grey, 1996; Grey & Mitev, 1995; Roberts, 1996). A stance that refuses to engage with managers serves very little purpose. It has been suggested that perhaps the focus of critical management education should be to include other sectors of society outside of management, such as labor unions and environmental groups. However, the reality is that most critical management education is occurring in mainstream management education settings and the emphasis ranges from a segment of a course to entire courses, such as were studied for this research project, to entire programs. Critical management education is only making small inroads into corporate programs (Perriton, 2000). With that said, critical management educators are educating those who are either in positions of management or aspire to be in those positions.

There are two important implications for management education, including such areas as executive education, executive MBA programs, and executive coaching. The corporate scandals of the past few years that began with Enron highlight the need for a discussion about the issues of corporate ethics. The first implication addresses the efficacy of teaching learners to be ethical while the second addresses possibilities for accomplishing this. The findings of this study suggest that management educators can teach learners to be ethical. In this study, two participants moved to a more critical and ethical stance in their management philosophy. In addition, five participants experienced an affirmation of their original critical and ethical philosophy. The course validated their philosophy. This is important in a business climate where society defines and legitimates the profit motive as the highest business goal in a way that makes
some behavior acceptable that society might otherwise condemn (Duska, 1992). An example of this would be firing an excellent employee to cut costs under the “legitimate” premise that “business’s primary and only responsibility is to make a profit” (Friedman, 1970, p. 126). The second implication for management education is that while the study examined the learners experiences in a CMS course where the critique of capitalism has a socio-political base that the results could be generalized to an area of management education that focuses less on a socio-political critique of management and more on business ethics. This area is known as Stakeholder Theory. Stakeholder theory presents an alternative to Milton Friedman’s profit maximization theory (Donaldson & Preston, 1995; Freeman, 1984; Phillips, Freeman, & Wicks, 2003). This theory “is used to interpret the function of the corporation, including the identification of moral or philosophical guidelines for the operation and management of corporations” (Donaldson & Preston, 1995, p. 71). In contrast to the concept of maximizing shareholder wealth as the only goal of business, stakeholder theory adheres to the view that the role of management is “to satisfy a wider set of stakeholders, not simply the shareholders” (Donaldson & Preston, 1995, p. 75). In essence, it is a theory of ethics in organizational strategy (Phillips et al., 2003). In spite of the lack of a socio-political focus (Phillips & Margolis, 1999), stakeholder theory does provide a more critical alternative to mainstream management philosophy.

There are also implications for using CMS in corporate management training settings (Perriton, 2000). As adult educators, it is important to assess at the beginning of an educational endeavor the expectations that we have for change to occur over the course of a 16 week semester or a one day training workshop. Is a heightened awareness at the end of a semester or workshop sufficient? What realistic goals for further action can we hope to develop? Learners are individuals and some may experience rapid transformation while others may just dig in their
heels and remain entrenched in their oppressive ways of relating to the world. In this setting, the use of experiential learning provides a springboard for focusing on power and privilege in organizations. This focus can be useful in adding the CMS component as well as a way to connect training materials to a here and now experience. As mentioned above, disrupting the power dynamics is a necessary part of the process.

Finally, there are implications for human resource and organizational development programs. Observing, critiquing, and developing strategies inside the classroom can be used as the first step in transferring learning back to the larger world (Vince, 1996). What can the learner use in her/his workplace environments? How could they go about enacting these new practices in the workplace? What might be the possible results, benefits, and barriers? I envision a moving back and forth between the classroom and the outside environment, each one informing the other. Often, the lack of possible alternatives causes awareness and action to stop at the door of the classroom. Another focus might be to help learners in these programs to understand the role of power in the organization and their role in maintaining or changing these power structures. Looking at the role of power in the development of learning communities, for instance, is one way to incorporate these concepts.

The results of this research project also point to additional research beyond the scope of this project. One direction would be to focus on the issue of impact in terms of the learners’ management practice (Elliott, 2003). This study focused on the learner’s philosophy. However, since one of the goals of CMS is to have an emancipatory effect on individuals and organizations (Alvesson & Willmott, 1992, 2003), a study that addresses the development of the learners’ practice would be of value.
A number of follow-up studies to specifically extend this dissertation research can also be suggested. First, in this study, two participants experienced a change in their management philosophy. A crucial component of that change was the way that the participants related past experiences to the course content and reinterpreted them in light of the critical content. However, four other participants, who experienced an affirmation of their mainstream management philosophy, did not reinterpret their experiences. The question that might be explored is what helped the learners to reinterpret their experiences in a way that allowed them to incorporate the critical content into their philosophy. Second, one characteristic of this study was that it only looked at the impact over the course of one semester. In one site, the class was 10 weeks long and in the other, it was 16 weeks. What would be the impact on the learner’s management philosophy as a learner encountered multiple critical courses, for instance over an entire master’s or doctoral program.

This study did not address any issues related to issues of race and gender. However, white males taught both of these courses. In adult education, it has been shown that the positionality of the educator is important to the learning that occurs (Johnson-Bailey & Cervero, 1998). Would the impact and the factors have been similar if the educator was of the other gender or a different race or ethnicity? Finally, the courses that were part of this study primarily combined critical content with the use of traditional pedagogies. What differences might have appeared if the CMS courses had used both critical content and radical pedagogies.

Epilogue

The epiphany described at the beginning of this dissertation has taken me down a long road. During that time, corporate scandals, such as Enron, reinforced my beliefs that the dominant model of business prevalent today, which focuses on maximizing shareholder wealth is
the one that oppresses most people in a myriad of ways. This journey has opened my eyes to how insidious this oppression can be. It has also illuminated the privileges that I am accorded and accept as a middle-class White woman that contributes to this oppression. I began this journey with the hope of helping learners to be critical thinkers. I end this particular part of my journey seeing the need, as an educator, to help bring about a more equitable society in the economic sector. It has been suggested, “the question that currently divides many adult educators is whether to locate their practice in civil society or the economic sector” (Cunningham, 2000, p. 577). I think that it is time that adult educators actively choose to locate our practices of social justice within the economic sector. This study shows that a critical theory lens in management education can have an effect on some of the learners’ management philosophy. More importantly, it shows that some learners in management education already share our critical agenda and find in our classes an affirmation for their “different” views of management.

What I have also learned from this study is that critical content is not enough. The “medium is the message” (McLuhan, 1964) in education as well as advertising. Teaching critical content without the use of critical pedagogies that challenge the underlying power dynamics existing in the classroom delivers a message that it is acceptable to critique or challenge in the abstract while leaving the system and the world unchanged. The use of critical pedagogies includes Freire’s (1970) idea of praxis. What is missing from CMS courses is helping the learner translate the critique into action. The use of critical pedagogies does not come without risk. There is the risk to the learner (Brookfield, 1994; Reynolds, 1999b) and there is the risk that the educator will only recreate or shift the oppressive elements (Ellsworth, 1989) advantaging only her scholarly reputation. Nevertheless, identifying and recognizing risks should not prevent us as educators from engaging in a critical pedagogy that might help the learners and ourselves find a
way out of the injustices of the economic sector. These risk do however, call us to be more aware
of the power and privileges that accrue to us as educators, especially those that are the result of
our membership in a particular race or gender. Risks call us to wrestle with the dilemmas and
shift that will occur and then begin again to critique what has emerged.
REFERENCES


the struggle for knowledge and power in society (pp. 206-225). San Francisco: Jossey-Bass.


APPENDICES
Management Centre

Critical Perspectives on Management

**MODULE INFORMATION**

<table>
<thead>
<tr>
<th>Academic Year:</th>
<th>2002/03</th>
<th>Lectures:</th>
<th>9</th>
</tr>
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<tr>
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<tr>
<td>Time:</td>
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<tr>
<td>Venue:</td>
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**MODULE LECTURER**

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<td>Telephone:</td>
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<td>Email:</td>
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<tr>
<td>Office Hours:</td>
<td>Wednesdays, 11.00am – 3.00 pm, by appointment</td>
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**MODULE AIMS AND OBJECTIVES**

**Aims**

Today there seems to be growing concern over the conduct, but more importantly the basic methods and goals of business and management, which has manifest itself in a widespread anti-corporate and anti-managerial sentiment. In this module we will ask why it is that business, managers and management have been cast in such a negative light in recent years. This module
will therefore try to provide an introduction to the anti-corporate and anti-managerial movements, with a view to a deeper understanding of the reasons for the emergence of this current resistance to business and management. The goal of the module is not to provide tools for controlling or ‘managing’ these things, but to try to understand why so many people today are angry with the conduct of business and management. This will be done by (1) sketching an historical and theoretical framework and (2) looking in some detail at a selection of instances of contemporary anti-corporate and anti-managerial sentiment.

**Objectives**
At the end of this module students should:
1. Have an increased understanding of the contemporary cultural and political context of business and management practice;
2. Have an increased ability to understand different viewpoints and develop mature and intelligent ways of negotiating these differences;
3. Work more effectively in groups, in particular develop skills in discussing, sharing and developing ideas in a group.

**Teaching Methods**

The module will be divided into two parts:

*Part One* (weeks 1-4) will consist of a series of lectures in which I provide an introduction to some of the issues surrounding contemporary anti-corporate and anti-managerial discourses. This will involve an historical and theoretical introduction to power, contestation and social movements. It will also include a session that directly addresses issues about how to study critical representations of business and management.

*Part Two* (weeks 5-9) will consist of a set of seminars involving student group presentations and class discussion. For these 5 seminars the class will be divided into ten groups (the groups you have been working with throughout the module), and each group will be allocated one book. In each of the seminar sessions, two groups will make a presentation about the book (maximum 30 minutes), which will be followed by a class discussion about the issues raised by the book.

**Class Timings**
In addition to attending all of the weekly sessions on Tuesdays, each group should make arrangements to meet with me at least one week before making their group presentation. These meetings will ideally take place during office hours, which are on Wednesdays between 11.00am and 3.00pm and should last approximately one hour. The purpose of these meetings will be to make sure your group is prepared to make a good presentation at the class seminar. See me in class or email me well in advance to arrange a meeting, suggesting a time your group can meet.
ASSESSMENT

Group Presentation
In order to complete the module you will need to take part in a group presentation. This presentation, which will last approximately 30 minutes, followed by 30 minutes class discussion, requires that you read the assigned book and relevant related literature. Your presentation should demonstrate understanding of the book, but more than this it should demonstrate a critical awareness of its limitations and make suggestions about what can be learned despite its failings.

Critical Book Review
Your grade for the module will be 100% based on an individually written Critical Book Review, which will critically analyse the book you have read and discussed in your group presentation. Note that the Critical Book Review must be your own work, even though you will have discussed the ideas in you review with your fellow group members. Your book review should be no more than 3,000 words, and should follow scholarly protocols. This means that you should not simply summarise the book but should place it in context, which will involve citing other works where necessary. As with the presentation, you should demonstrate (1) understanding, (2) critical awareness, and (3) be able to make suggestions for further development of the ideas in the book.

Plagiarism
To plagiarise is to give the impression that you have written or thought something that you have borrowed from someone else. This means that if you want to refer to the ideas of others you must use a referencing system. It also means that all work that you submit should be your work, written by yourself alone. Plagiarism will not be tolerated, and will be treated with the strictest severity. For further details see pages section 15 on Academic Dishonesty on pages 27-28 of the Postgraduate Regulations, which can be found at www.------------------------.pdf

READING LIST

Part One:
In preparation for the first four lectures, I will provide you with a set of photocopied readings. You will be required to read them all.

Part Two (Background Reading)
There is an ever-expanding literature that expresses criticism of business and management. Some useful reference texts which are reflective of these developments include:


Part Two (Group Presentation and Critical Book Review)
The books that we will look at this year are some of the most recent and relevant that are currently available. You must buy and read the book which is assigned to you, although I will expect you to become familiar with all of the other books in this list. All these books should be available at the University Bookshop (talk with the staff at the main desk if you have any difficulty finding books). Group 6 should speak to me immediately to discuss preparation for their presentation and assignment.


**MODULE CONTENTS**

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<td>Lecture 3. Power and Hegemony (Theory)</td>
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<td>1. Abrams, <em>Below the Breadline</em></td>
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<td>3. Bircham and Charlton, <em>Anti-Capitalism</em></td>
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<td>6. Gervais, <em>The Office</em></td>
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8. Bové, *The World is Not For Sale* |
|          |                                                   | 10. Stiglitz, *Globalization and its Discontents*                     |
APPENDIX B

COURSE SYLLABUS FOR SOUTHEASTERN USA UNIVERSITY

Professor ----- -. ----- 
--448 
Office Hours: By appointment 
Phone: ------- 
Email: ----.------@---.---.edu

ACG 7xxx

Seminar in Critical Accounting and AIS

Objective: 
Provide the student with the ability to undertake in depth study in the area of 
critical accounting and accounting information systems (AIS).

Description: 
Provide an in depth understanding of the critical accounting and AIS literature and 
acquire the knowledge and skills necessary to undertake scholarly research in the 
area.

Evaluation Criteria: 
Informed class participation indicating a familiarity with the assigned readings and 
a research proposal. A primary consideration is the ability to link the proposed 
research to the public interest by situating the projected findings within the 
economic, social, ethical, political, and historical context, and ultimately providing 
guidance for responsible action.

Learning Outcome: 
The student will develop a familiarity with the extant literature to the extent that an 
informed critique can be undertaken and original ideas can be formulated, 
contextualized, and evaluated as a precursor to in depth study in the area.

Materials: 
The primary learning materials are represented by published academic research in 
accounting, AIS, and related fields.
Assignments:
A series of readings will be assigned for each class session. The student is expected to read each of the assigned items prior to class and be prepared to provide informed insights and critique as part of the class discussion.

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<tr>
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<th>Topic</th>
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<tbody>
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<td>Evaluating critical IS/AIS research</td>
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<td>Caterpillar controversy – Foucault and his critics</td>
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<td>Spring break</td>
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<td>12</td>
<td>Implementing critical accounting and AIS – An academic perspective</td>
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<tr>
<td>13</td>
<td>Implementing critical accounting and AIS – Association for Integrity in Accounting</td>
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<tr>
<td>14</td>
<td>Policy to praxis; Final draft of paper due</td>
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<tr>
<td>15</td>
<td>Working paper; Provide referee comments to authors</td>
</tr>
<tr>
<td>16</td>
<td>Final paper and presentations due</td>
</tr>
</tbody>
</table>
CONSENT FORM

I, ____________________________, agree to participate in a research study titled “Learner Reactions To Issues of Power and Privilege in a CMS Course” conducted by doctoral student Catherine H. Monaghan from the Department Of Adult Education at the University of Georgia, Athens, Georgia, USA (706-542-2214) under the direction of Dr. Ronald M. Cervero, Department of Adult Education, University of Georgia (706-542-2221). I understand that my participation is voluntary. I can stop taking part without giving any reason, and without penalty. I can ask to have all of the information about me returned to me, removed from the research records, or destroyed.

The following points have been explained to me:

1. The purpose of this study is to understand the process by which adult learners come to incorporate critiques of capitalism, taught in CMS classrooms, into their management philosophy and practice. Through my participation in this study I will be contributing to the knowledge in this area and I may gain some personal insights.

2. If I volunteer to take part in this study, I will be asked to do the following things:
   a. Participation in this study will require a personal interview with the researcher lasting approximately 1 to 2 hours. A brief follow-up telephone interview may be necessary if the researcher needs to clarify information. The interview will be tape recorded and transcribed by the researcher.
   b. The participant will be asked to review their transcript for accuracy. The amended transcript must then be returned to the researcher.

3. I will receive a $15 gift certificate at the time that the consent form is signed and a $15 gift certificate at the end of the interview.

4. No discomforts or stresses are expected.

5. I understand that there are no foreseen risks involved in this research.

6. The results of this participation will be confidential, and will not be released in any individually identifiable form without my prior consent, unless otherwise required by law. Any publications from the research will use pseudonyms. The tape recording of my interview will be destroyed at the completion of the study’s data collection, analysis, and write-up, May 2004.

7. The researcher will answer any further questions about the research, now or during the course of the interview and project, and can be reached at 1-706-227-2489 or can be reached by email at katemuga@aol.com.

I hope you enjoy this opportunity to share your experiences with others. Thank you very much for your assistance.

I understand that I am agreeing by my signature on this form to take part in this research project and understand that I will receive a signed copy of this consent form for my records.

_________________________     _______________________________________________             __________
Name of Researcher                   Signature                                        Date
Catherine H. Monaghan
Telephone: (706) 227-2489
Email: katemuga@aol.com

_________________________       _____________________________________________               __________
Name of Participant      Signature            Date

For questions or problems about your rights please call or write: Chris A. Joseph, PhD., Human Subjects Office, University of Georgia, 606A Boyd Graduate Studies Research Center, Athens, Georgia 30602 – 7411; Telephone: (706) 542 – 3199; E-Mail Address IRB@uga.edu.

PLEASE SIGN BOTH COPIES AND RETURN ONE TO THE RESEARCHER
INTerview Guide

Background Questions

1. What management experience do you have?
2. Why did you elect to take this course?
3. In what ways has this course fulfilled your expectations?
4. How does this course compare to others that you have taken?

The Interview

Part A – Content Example

Using a written example that I have composed based on something that occurred during the first class observation (where there was a specific focus on something related to a critical management stance about the topic), I will read the content example and then give a copy to the participant to read/use when answering the first set of questions. (Note: if there is no such example, I will be prepared to take one from the textbook)

5. Identify the ethical issues of this case. (As the participant is talking I will make a list of these issues. If there is more than five, ask them to choose their top five)

6. Discuss how a critical management theorist would handle each one of these ethical issues. (Double check to make sure that at least the top five ethical issues are covered)

7. Before you took this course, how would you have understood or thought about each issue?
8. How has this course informed your ethical decision making?

- Possible probe: What case from this class was the most salient or spoke to you the most? (Only use if they have a hard time relating to the example)

**Part B – Personal learning experience**

Please tell me about a powerful learning experience that you have had related to this class. It would be an experience of an event or interaction that you recall vividly because it stands out in your memory as important. For the purpose of this interview, this might be a pivotal experience, event or discussion where you learned something that was personally important to you. This experience may have occurred any time during this particular course – either inside or outside the classroom.

9. **Use as much detail as possible to describe the experience.** (I will provide the participant with a listing of these questions for their use as they talk about the experience).

- What happened?
- Who was involved?
- In what ways did the social locations of the individuals involved affect this experience?
- How did you react or participate?
- What were your feelings
- What meaning did this experience have for you?

(Note: I will check off the questions as they are answered in order to make sure that no questions are skipped.)

10. **What did you learn from this experience?**

11. **What helped you to learn?**

12. **When you think back on this experience, how could you have learned more?**
**Part C- Participants prior critical incident**

Tell me about a time, as a manager, when you had to make some tough decisions.

13. **Imagine that you are actually back in this management situation that you chose.**

   **Use as much detail as possible to describe the situation as it occurred.**
   
   ➢ What happened?
   
   ➢ Who was involved?
   
   ➢ What feeling(s) did you experience as a result of this incident?
   
   ➢ Why do you think this situation occurred in the first place?
   
   ➢ What were you or others attempting to accomplish in this situation?
   
   ➢ In the end, how did things turn out? How do you feel about this?

14. **Identify the ethical issues of this case.** (As the participant is talking I will make a list of these issues. If there is more than five, ask them to choose their top five)

15. **Discuss how a critical management theorist would handle each one of these ethical issues.** (Double check to make sure that at least the top five ethical issues are covered)

16. **Before you took this course, how would you have understood or thought about each issue?**

17. **How has this course informed your ethical decision making?**