

## **Abstract**

This dissertation will critically evaluate the use of Forum Theatre as an Arts Based intervention to raise awareness of issues relating to Equality and Diversity by exploring a case involving the analysis of workplace bullying and harassment linked to misunderstandings and misconceptions stemming from employee mental health issues. Claims that Forum Theatre can effectively raise awareness and tackle issues of bullying and harassment while simultaneously adhering to an Arts-Based theoretical framework will be assessed. This will open up the research to include discussion on Forum Theatre's viability to be implemented in the workplace over the long-term and the challenges that modern organisations face in assessing the costs and benefits.

## **Chapter 1**

### **Introduction**

The Arts heretofore have been used in a variety of ways and in a variety of settings. Arts techniques such as poetry, dance, various forms of theatre and painting amongst others have been used as an innovate and alternative epistemology. (Finley, 2003) Likewise, artistic principles and techniques have been harnessed and implemented with various degrees of success in disciplines including Social Work, Education, Therapy and Business Management. The Arts have been used principally as an innovative, creative and collaborative alternative to explore meaning and gain a deeper understanding of social phenomena. (Lincoln, 1995; Denzin, 2000) This has seen a gradual increase in the uptake of the Arts in mainstream Academia and a number of research projects have produced compelling evidence of positive results in terms of direct participation and the empowerment of people who draw significant advantages, personally and in terms of their contribution to collective activities of one sort or another. (Saresma, 2003; Beirne & Knight, 2004, 2007; Gibb, 2004; Hughes & Wilson, 2004; Gibb & Waight, 2005; Szto, Furman & Langer, 2005; Pounsett et al, 2006; Carson, Chappell & Knight, 2007; Estrella & Forinash, 2007) Other Arts Based interventions, however, have sought to contain reflection and in some workplaces promote a particular view of management rather than stimulate independent thinking. (Clark & Mangham, 2004b; Beirne & Knight, 2007)

Forum Theatre as an Arts Based intervention has been attracting considerable interest over the past few years. Coming to prominence in the late 1970's following the publication of Augusto Boal's *Theatre of the Oppressed*, elements of Forum Theatre's original revolutionary, confrontational Marxist philosophy have perhaps surprisingly found their way into Western organisations in turn attracting the interest of several scholars. Their research has made tentative first steps in evaluating the benefits, the problems and the challenges in applying Forum Theatre in a modern business environment. (Coopey, 1998; Nissley et al, 2004; Clark & Mangham, 2004a; Gibb, 2004) Participant perception and organisational impact factors as well as describing and critically evaluating the theory behind the practice of Forum Theatre and the challenges providers and users face in accessing, tracking and evaluating the results have still to be investigated.(Gibb, 2004: 749) By looking at a case study involving Forum Theatre's potential to raise awareness and tackle Equality and Diversity issues such as bullying and harassment, one will make an effort to try and address some of the outstanding research issues.

## **Chapter 2**

### **Research methodology**

The research for this dissertation has taken a case study approach involving participant observation of the same Forum Theatre production seen over two sessions, three in-depth semi-structured interviews with three Equality and Diversity Directors who attended the event, a detailed questionnaire based upon the semi-structured interview guidelines completed by the Director of a UK based equality forum who was also in attendance and an in-depth semi-structured interview with the Director of the Forum Theatre company who also facilitated the conference workshops. Prior to the conference a preliminary meeting took place between myself and two of the Forum Theatre company Directors. This was very useful as it provided a valuable initial insight into their services and business practices. It also paved the way for me to gain access to their workshops at the Innovate to Integrate conference at Glasgow Caledonian University that took place on June 26<sup>th</sup> 2008.

Each research method adopted will now be discussed followed by a consideration of the strengths and weaknesses of the research design.

#### **2.1 Participant observation**

Participant observation allowed an opportunity to actively witness the dynamics of a Forum Theatre session as it is produced and enacted. In addition to the content of the Theatre session, one had the opportunity to witness audience behaviour, interactions and groupings. As Labaree said this allows the researcher to delve deep into the crevices of a scenario and develop a deeper understanding of its complex dynamics. (Labaree, 2002) My ability to record the dialogue accurately is, of course, curtailed by the fact that I was not allowed to record the proceedings either by using a camcorder or a dictaphone. Much of the dialogue was rooted in a West of Scotland dialect and the discourse could be best described as 'ordinary' and 'everyday' in the sense that common tropes and informal cliches formed the bulk of what was said. The scenario depicted was arguably easy to follow and did not require any *a priori* knowledge or experience to understand what was happening. There was no application of any esoteric, technical discourse that would have required careful transcription for future study, analysis, elucidation and understanding. The context was one that many participants could relate to coming as they did from various Human Resource and Equality and Diversity

departments. One could argue that not transcribing or filming the proceedings has not unduly prevented me from accurately recording the event. Copious notes were made by me and four in-depth, semi-structured interviews took place with participants and the Theatre facilitator.

My status as a researcher and observer did not appear to impact on the proceedings. The facilitator announced beforehand to the audience my identity and purpose for attending. There were no objections and one could argue my presence was welcomed as many of the attendees were very interested in my research. There was no evidence to suggest my presence distorted the research findings by encouraging attendees to behave differently than what they would have done or behave unnaturally. There did not appear to be any evident suspicion or cynicism concerning my motives from the attendees.

Participant observation notes were recorded and then coded according to Spradley's list of generalised concerns. (Wolfinger, 2002) This allowed for a full description of recorded data according to a series of important phenomena such as a full description of the physical place where the event took place and a full description of the Forum Theatre activity itself. Full details in Chapter 4.

## **2.2 Semi-structured interviews**

Following the Forum Theatre sessions it was important to determine their effectiveness from the participants' perspective and gain further valuable insight into the Forum Theatre process. I interviewed three participants in private on their employers' premises at later dates following the conference. They were very happy to be interviewed and for the interview to be recorded provided their anonymity would be protected and that all data would be treated as confidential. Interviewees have been labelled numerically – interviewee 1, 2 and 5. All three interviewees are Equality and Diversity Directors in the Public Sector and appeared to be very knowledgeable and experienced in their areas of work. All interviewees appeared comfortable, confident and willing to divulge sensitive information and discuss the subject matter openly and without resistance. The duration of each interview was 16 minutes, 18 minutes and 33 minutes respectively. One other attendee who agreed to be interviewed pulled out because she did not have the time. However, she agreed to complete a questionnaire based upon the semi-structured interview guidelines, which I e-mailed to her the following day. I received it approximately three days later. This interviewee has been

labelled as interviewee 3.

The Forum Company Director who also facilitated the Forum Theatre workshops was also interviewed in private on his company premises. He was very open, confident, assertive and helpful and appeared willing to discuss the subject matter without reservation. Again, I guaranteed confidentiality and anonymity and consent was freely given to record the interviewee. Duration of the interview was 35 minutes.

Interviews were transcribed and analysed using a coding analysis. Digital copies of the recorded interviews are available for further clarification. (see Appendices for full transcriptions)

Semi-structured interviews allow an opportunity for research participants to feel more at ease and more comfortable to explicate their feelings on such a sensitive area as bullying and harassment, knowing that their views and opinions have been made in private. This would be in contrast to using a Focus Group for example in which the participants may feel uneasy about sharing their views and opinions on a subject matter that has become very controversial in the last ten years. (Mitchell, 1999)

One's aim was to ensure that the interview structure would be as objective as possible. One did not wish the interviews to be clouded by one's own subjectivities and beliefs that could skew judgement and distort the data. (Roulston et al, 2003) Interviewees were allowed to answer freely and, within reason were spared interruptions. (see Appendix I and VIII for interview schedules)

### **2.3 Strengths**

Observing a Forum Theatre session in action allowed for valuable insights into the actual processes involved. This allowed for a more accurate reflection on the issues an organisation would have to contend with when implementing a Forum Theatre intervention and also the strengths and weaknesses of this particular Forum model. The semi-structured interviews offered valuable insights, new ideas, views and opinions from four leading practitioners in the field of Equality and Diversity on the practical challenges faced when implementing Forum Theatre. Both factors one could argue have proven invaluable not only in informing this research project but mapping out future research direction in this area.

## **2.4 Weaknesses**

All case study analyses suffer from criticism relating to reliability, generalisability, replicability and validity. (Bryman, 2004: 50) As stated before the purpose of this research is not to draw any conclusions but explore in detail how Forum Theatre can potentially raise awareness and tackle issues of workplace bullying and harassment and tease out important issues that can be explored in future research projects. All of the data collected has been thoroughly considered, weighted, coded and applied objectively and sensitively. Nevertheless concern remains at the lack of interview data. Admittedly, this is a concern. Due to the sensitivity of the subject matter the majority of participants were unwilling to be interviewed. One participant who initially agreed to be interviewed later called to confirm she could not take part following strict instructions from her employer. This is regrettable and perhaps reflects the uneasiness in many Public Sector organisations concerning the extent of bullying and harassment. An issue that in itself merits further research. Nevertheless, as discussed previously, the four practitioners who agreed to take part offered valuable, detailed and very useful data that has been vital for this research project.

## **Chapter 3**

### **3.1 Literature review search method**

Articles eligible for review are empirical studies in which Social Science researchers apply Arts based research methodologies as an epistemological alternative to traditional Social Science qualitative and quantitative research methodologies. This will allow a full discussion of the theoretical background to the application of the Arts in Social Science research. To identify relevant articles, a keyword search was conducted on Business Source Premier, Glasgow University Library search homepage, Swetwise, Sage, Jstor and Google Scholar. Keywords included 'Arts Based Research' , 'Arts Based Inquiry' , 'Arts Based Interventions' , 'Arts Based Processes' and 'Arts and Business'.

Other empirical and conceptual studies open to analysis discuss the impact of Theatre based techniques and interventions in a variety of workplaces and settings including business organizations, social service outlets, universities and marginalised foreign communities. Traditional qualitative research methodologies – focus groups, questionnaires, interviewing - were generally used for evaluation. Again, to identify relevant articles, a keyword search was conducted on Business Source Premier, Glasgow University Library search homepage, Swetwise, Sage, Jstor and Google Scholar. Keywords included 'Forum Theatre Interventions', 'Community Theatre Interventions', 'Theatre and Empowerment' and 'Corporate Theatre'.

All of the journal articles chosen for inclusion are peer reviewed and have been published in well respected journals. Each article outlines its theoretical framework and research methodologies in detail. Literature sourced from books have been published by well respected publishing houses and the literature itself is well respected in their chosen disciplines.

### **3.2 Arts and the Social Sciences: confrontation or collaboration?**

Harnessing artistic principles to challenge a dominant rational and esoteric Social Science research paradigm is a key point in much of the Arts Based literature. Many authors argue for a more diverse, participative, democratic Social Science epistemological canon that incorporates Arts Based Techniques such as Theatre, citing traditional methodologies as being not up to task on their own when researching complex human phenomena. (Finley, 2003; Conquergood, 2002; Bagley & Cancienne, 2001; Barone, 1997, 2001; Denzin, 2000, 1997; Lincoln, 1997) Academia it would seem must face up to a new reality in which research projects must factor in human emotion, subjective storytelling and other 'irrational' behaviours, attitudes, actions and elicitations to more fully understand our social world and draw more detailed, accurate and realistic conclusions. (Rinehart, 1998; Mienczakowski, 1997, 1995; Paget, 1990) Frustration is rife in much of the literature at what is seen as a traditional, scientific Academic power base, socialised into believing the 'superiority' of Enlightenment thought, upholding values of certainty, objectivity, generalisability and replicability as virtues to protect the 'ivory tower', dominating and controlling what is and what isn't accepted as 'good' and 'acceptable' research and blocking publication of articles using Arts Based Research techniques in leading Social Science Academic journals. Richard Rorty (2002) believes these academics to be 'blinkerred...to other possible methods...to the detriment of research'. Eisner (1997) compares traditional Social Science research methodologies with looking through 'half-closed Venetian blinds', one only gets a partial and incomplete picture of the research subject. Likewise arguments persist that the perceived power inequalities between researcher and research participant that the dominant Social Science Research paradigm creates must also be tackled.

Researchers have used a form of Theatre called Ethnodrama to disseminate research findings when exploring sensitive issues such as poverty (Foster, 2007), homelessness (Finley & Finley, 1999), alcoholism (Mienczakowski, 1997, 1995), abortion (Ellis & Bochner, 1992), terminal illness (Paget, 1990) and divorce (Foster, 2002). The researchers would create narrative scripts from interview and focus group transcriptions with research participants, which would then be acted out by the research participants themselves or by professional actors to a captive audience. Both the researcher and audience, Saldana (2003) argues, gain understandings that would not have been possible through

conventional qualitative data analysis, writing and presentation. Ethnotheatre's artistic rigour, representational power and direct participation and collaboration with research participants would appear to have made a valuable contribution to the existing Social Science Research Paradigm.

Goodall (2000) argues that the best lens for fieldwork views human action “dramatically” (based on the assumption that everyday life is played out like a drama with all of us taking our roles on the stage of human experience. (Kalb, 2001) The use of Ethnodrama has produced some compelling results with participants' raising awareness of important issues and in one case producing fundamental policy change in how health professionals deal with alcoholism and drug addiction. (Mienczakowski, 1995, 1997) However, there is no evidence whether the inclusion and increased use of Arts Based Research epistemologies would seriously challenge the dominant paradigm. There is a lack of consistency in approach with some researchers opting for a more confrontational strategy, arguing that Enlightenment thought is a product of a dominating and discriminating patriarchy (Foster, 2007) while others believe a more conciliatory approach would be more prudent, arguing for a dialectical synergy between the creative, subjective and emotional tensions of Aesthetics and Art with the objective and rational ethos of Science. (Finley, 2003). Many authors argue that an Arts Based approach using Theatre is more accessible and more easily understandable to the lay-person and research participant than esoteric and highly technical traditional Scientific approaches, thus wresting control from who Barry Barnes would perhaps describe as authoritarian technocratic Scientific Academics who simply want to consolidate their own positions at the expense of epistemological progress and innovation. (Barnes, 1972) One could argue that this is a gross reductionist, zero sum perspective. Many Social Science Academics have embraced several innovative and often controversial research epistemologies such as Mode 2 research (MacLean, MacIntosh and Grant, 2002), Complexity Theory (MacIntosh and MacLean, 2001), Critical Management Studies (Beirne and Knight, 2007), Grounded Theory (Locke, 2001) and Action Research (Van de Ven and Johnson, 2006) that have sought to create and support more democratic and participative research strategies. Arts Based Researchers also appear to be oversimplifying the complexity of both the Arts and Theatre. One could argue that it is naïve to suggest that research participants can simply slot into and quickly understand an Arts Based Ethnodrama, seemingly ruling out the need for participants to become acquainted with and knowledgeable of Aesthetic and Artistic theories, norms and approaches, or what Chong (2002) would describe as the Aesthetic code. There is no evidence that research subjects were given sufficient training in the Arts to properly act out a drama or to accurately create or critique a narrative script based upon their own life experiences. In many cases, professional actors were used to portray the research subjects to a

captive audience to ensure professionalism and accuracy. (Mienczakowski, 1997, 1995) Are Arts Based Researchers not therefore reinforcing a perceived power gap between themselves and their subjects? Are Arts Based Researchers not aware of the epistemological power and complexity that *they* wield? After all it is the researchers themselves who 'hold the pen' so to speak, writing the journal article, weighing up the strengths and weaknesses, depicting those involved in a manner they deem appropriate and drawing their own conclusions. Perhaps a true democratic and collaborative approach would involve the research subjects in contributing to the writing of the journal article itself, offering feedback in an iterative joint writing process.

The authors also fail to provide evidence that would support their view that a number of Social Science journals are ignoring or refusing to publish their work. An obvious point that has seemed to go unnoticed is the fact these articles *have* been published in leading Social Science journals with little objection or Academic outrage, after all one wouldn't be reviewing them now. Qualitative research as a whole has faced an uphill struggle over the years, (Sutton, 1997) so it is perhaps unfair to suggest that journals supporting Qualitative Research work would deliberately obstruct or ignore Arts Based research. They fail to attempt to quantify the full extent of power traditional Social Science Academia is alleged to have at its disposal and how it is or could be applied against them. By continuing to demonstrate the effectiveness of their output and engaging more fruitfully and actively with other Academics, Arts Based researchers promoting the use of Ethnodrama as an effective means of disseminating Social Science research findings may be more successful in convincing sceptics of its merits, rather than adopting a confrontational approach. Likewise Academics who are perhaps wallowing in a comfort zone bedded by Enlightenment thought, or who are suspicious or complacent of Arts Based research innovations and progress may have to indulge in copious amounts of alternative thinking.

It is not the *raison d'etre* of Arts based research methodologies to provide a safe haven for traditional forms of research. It offers an alternative and powerful toolkit to research current issues in a dynamic, participative, democratic, colourful and deeply insightful manner. Perhaps the nuances, complexities and contradictions of human behaviour, agency and decision making 'missed' in traditional Business Management research projects can be uncovered by the Arts. After all, Academia is about research and progression. Taking Foucault's lead, how we know about what we know is surely an issue all of us must continue to labour over. Further Research on how to reconcile the exciting freshness and brashness of the rising star of an Arts based research paradigm with Enlightenment tradition is arguably a very exciting and worthwhile proposition.

### **3.3 Forum Theatre and Power Dynamics: From the Backyards of Brazil to the Western Workplace**

Augusto Boal, one of the founding fathers of Forum Theatre, expressed his desire for participants in Brazilian slum dwellings to consider what factors within society contributed to their oppression. He was keen for participants to demonstrate through the creation of their own theatre based upon their own life experiences, how these oppressions impacted upon their lives, why these oppressions occurred and how the participants could overcome them. (Boal, 1979) Boal believed that Forum Theatre could act as a testing ground for a series of strategies that would bolster the revolutionary struggle, by improving participants' self-esteem through a process of group collaboration, creativity, reflection, debate and improvisation. Boal has become something of a celebrity in the world of the Arts and his ideas have influenced a large number of people around the globe, who have designed and implemented Forum Theatre interventions in a number of settings. Boal's work is deeply contextual, created as it is from his work amongst groups of disadvantaged people in South America, often living in conditions of extreme poverty, marginalisation and political instability. His work in Brazilian slum-dwellings and amongst native Indians in Peru appear to demonstrate the enjoyment, the excitement and the energy his Forum Theatre sessions produce. (Boal, 1979) What is not clear is how successful his methods are for effectively and accurately analysing existing power structures and power dynamics. Boal's frame of reference is heavily influenced by Marxist theory and, one could argue, bears heavily on the Forum Theatre participants. He argues for a strictly democratic process in which everyone, from the literate to the illiterate, disabled to the able-bodied, the articulate to the inarticulate, takes an active role in creating a piece of theatre that reflects the group's life experience. During the session, the audience, known as 'spect-actors' can participate directly by freezing the action, joining in and suggesting alternative suggestions on how to move forward. There are a number of fundamental problems with Boal's approach not discussed in his literature or elsewhere, problems that have affected the implementation of Forum Theatre today.

### **3.3.1 Informal group processes in Boal's theatre**

Theory suggests that the dynamics of group formation will result in natural leaders emerging. (Mullins, 2005) His or her's attitudes, beliefs and experiences may differ markedly from the rest of the group and may influence the play to proceed in a direction not altogether indicative of the group at large. The result may leave the other participants feeling dissatisfied, neglected and ultimately cynical about the whole approach.

### **3.3.2 Boal's political frames of reference and power discourse**

Boal believed that 'the audience, the people have the opportunity to try out all their ideas, to rehearse all the possibilities, and to verify them in practice, that is, in theatrical practice...It is not the place of the theatre to show the correct path, but only the means by which all possible paths may be examined.' (Boal, 1979: 139) Boal however had a very clear bi-polar political revolutionary frame of reference, one that sees the ruling classes as the oppressors and pretty much everybody else as the oppressed. This is arguably an over-simplistic analysis on the dynamics of power. It echoes Steven Lukes (2005) first dimension of power whereby those who are in hierarchical positions of seniority force those below them in rank to do their bidding. Of course, Brazil in the late 1970's was very authoritarian and it is understandable why Boal had these views. Nevertheless, one could argue that Boal's political views would surely have a considerable influence on the direction the participants took their theatre performances. Much of the evidence Boal presents demonstrates that the theatre participants are the 'victims' of the 'ruling classes', being deprived proper housing, social services, job opportunities and education. Is Boal's political frame of reference skewing the participants' analysis of power structures and dynamics? (Edwards, 2006) Rather than confronting, is Boal simply reinforcing a power structure by using a discourse that continues to label the marginalised as the 'oppressed' and the ruling classes as the 'oppressor'? (Brewis, 2001) Should Boal encourage engagement, collaboration and dialogue with the 'ruling classes', rather than confrontation? Is Boal simply containing the participants' frustrations rather than genuinely seeking to reshape their mental models more positively? Boal never seriously addresses what the outcomes would be were the oppressed ever to become emancipated, raising doubts about the veracity of his scheme. Indeed Boal is now closely involved with President Lula

da Silva's current Brazilian administration, so can we assume he has now jumped ship to the ruling classes whilst continuing to feed the 'oppressed' more revolutionary dogma? Ridiculous as this may sound, his discourse on power relations has nevertheless posed this question. From a Foucauldian perspective, one could argue that the oppressed, once free from one set of power relations will become locked into a different set of power relations whereby they might become the oppressors. (Hindess, 1982, 1996)

### **3.3.3 Forum Theatre in Western Organisations**

Despite Boal's Marxist revolutionary approach, Forum Theatre has found its way into Western Corporate and Public Sector organisations with several Theatre consultancies here in the UK being set up to cater for the demand. There has been some tentative Academic analysis thus far that has discussed Forum Theatre's apparent ability to develop trust between management and staff (Gibb, 2004; Koppet, 2002; Coopey, 1998), develop spontaneity and creativity (Montuori, 2003; Monshavi, 2001; Gray, 2000), improve collaboration and creativity (Nissley et al, 2004; Monks et al 2001), improve communication (Clark & Mangham, 2004a), develop problem solving skills (Gibb, 2004) and develop effective interaction (Gibb, 2004; Coopey, 1998). There appears to be a shift from Boal's original view of developing Forum Theatre as a political weapon for radical change to using it as a management development tool to improve on employee skills rather than seeking to scrutinise power dynamics. Boal himself has been scathing on the use of Forum Theatre in organisations seeing it as a 'Theatre of the Oppressor'. (Clark and Mangham, 2004a) Regrettably, much of the literature fails to discuss Forum Theatre's relationship with organisational politics and power dynamics in any great detail. The little discussion there is appears to develop the view that Forum Theatre in essence provides a snapshot of hierarchical power relations but really fails to scrutinise and reflect on their impact, how and why they should be changed, if at all, and how Forum Theatre could be developed as an effective intervention. Clark and Mangham (2004a) discuss the application of a Forum Theatre production in an organisation that used professional actors rather than the employees to act out a storyline involving the need to improve Management communication. The storyline was forced upon the employees who could not participate directly in the action:

'The audience were not sanctioned to speak and so were treated as the passive recipients of messages controlled by those in power...The plots were not focused on structural change but second order issues such as communication. The

prescriptions for future success contained within this play are not about the subversion or redesign of the hierarchy, but rather, its maintenance and lubrication (Clark and Mangham, 2004a: 847-848)

The Forum Theatre play in this example would appear to reflect and consolidate the existing organisational culture and employee-management hierarchical relationship - the Boalian Forum Theatre process' democratic foundations would appear not to have been implemented in this example. However, the authors fail to provide evidence that Management deliberately hired the Theatre company as a means of strengthening their own position or further inculcating their staff. Likewise, there is no practical guidance as to how the Forum Theatre could have been improved upon or redesigned. There is also no evidence to suggest the play was unsuccessful – there does not appear to have been any effort made to determine employees' and management's views and perspectives post-production. Perhaps the play did have a positive effect? Where is the follow up?

Other publications talk in rather woolly and abstract terminology referring to Forum Theatre's ability to create a 'liminal space...[a space] suspending hierarchical relationships' allowing freedom of expression and the 'birth of a new local form of politics...[allowing workers] to project themselves more fully into the learning spaces created by organisational change...and develop more of their potential.' (Cooper, 1998: 380) One could argue that this sounds rather naïve. There is little consideration given to the fall-out and the fault-lines that creating a 'local form of politics' could cause in an organisation. A Boalian perspective would argue perhaps for a confrontational strategy with fundamental, non-hierarchical structural change being at the top of the agenda. There is no evidence to suggest however that creating these forums would in fact result in any fundamental change in power relations. There is also no practical guidance as to how they can be implemented, what challenges they would face, how they would be assessed, what additional staff training would be required and what the quantitative costs would be in doing so. Whose voices would be most heard in these forums? Who would have control? Would they become just a toothless talking shop, a means to contain employee discontent by appropriating employee sub-cultures (Beirne, 2006) and informal space (Hindess, 1996)? Would a collaborative approach between several important stakeholders such as management, employees, clients/customers and union representatives not ensure a more democratic and constructive voice? What would happen to employees who did not wish to become part of a Forum Theatre intervention?

Coopey has drawn attention to Forum Theatre's 'pluri-vocal' effect when unhindered by professional actors – all participants' voices are heard. Participants may, however, all say or stress different

things, making it difficult to find commonalities. Eisner (1997), Barone (2001, 1997) and Kalb (2001) argued that to make sense of the output from a 'pluri-vocal', democratic and participative Arts Based technique such as Forum Theatre, one must cut across all voices and create a narrative. A Forum Theatre piece may become messy, unfocused and ineffective, if say ten participants each hold opposing and quite different views and perspectives on the subject matter. Creating a skeleton, draft script may be a logical step to help link some of the themes, points and perspectives to generate a narrative that an audience can follow, be interested in and interact and improvise with. However, who creates the narrative? Would it be the participants, or should everyone be involved including management? Whose views would appear to trump others? The Forum Theatre production process may prove invaluable in providing insights into an organisation's power dynamics. This is particularly important when producing a Forum Theatre piece involving sensitive and controversial areas such as Equality and Diversity and Bullying and Harassment. None of these points have been directly discussed in the literature.

Analysing Forum Theatre's 'pluri-vocal' element may give some guidance as to an organisation's meta-narrative. Perinbanayagam (1991) argued that employees who create a piece of Forum Theatre reproduce the organisation in and through the dialogue and talk itself and that the discourse that emerges is influenced by the roles of the participants in the organisation. Who talks and how they talk is influenced by the disposition of power and status. This would suggest that employees were incapable of exercising basic human agency or being able to think for themselves. Evidence has shown that many employees are more than capable of acting on their own volition and undertaking transgressive role behaviour by deliberately underperforming to undermine their employer's productivity (Liefoghe and Davey, 2001), taking sick leave (Salin, 2003) and sabotaging and vandalising their employer's equipment and property. (Giacalone, 1997) The issue is perhaps whether employees would choose to air or mask their grievances during a Forum Theatre session. Nissley et al (2004) through a series of case studies discuss the issues of who has control over the Forum Theatre roles and over the script:

'In its simplest sense, we understand 'the organization' to be controlled by managers. Indeed, our examination shows that theatre-based training can be corporate-controlled (a 'theatre of the oppressor'). Thus, most forms of theatre-based training can be described as 'managerialist', as opposed to labor-controlled. One can say that theatre-based training can be a managerial tool for shaping organizational performance.' (Nissley et al, 2004: 833-834)

The authors have created a conceptual framework in which they argue that management are seeking

to curb employee influence and input by hiring Forum Theatre companies with pre-packaged, off the shelf scripts or with skeleton scripts that can be moulded through limited co-operation with staff to create a sanitised depiction of employees' organisational experience. Again, the authors don't present any evidence to confirm management did indeed seek to appropriate or subvert the Forum Theatre process by curbing employees' direct participation, collaboration and involvement with the project. There is no mention of employees' attitude(s) towards the Forum Theatre events or a description of the organisations' culture. Adopting a self-improvised Forum Theatre intervention into an organisation in which employees traditionally do not participate directly in organisational decision-making or direction may prove ineffective. Gibb (2004) pointed out that proponents of Forum Theatre argue for 'disequilibrium', to shake the foundations of naturalised, taken for granted assumptions and beliefs and attitudes to create disharmony, uneasiness, uncertainty and conflict. Gibb observed that in the Forum Theatre session he witnessed, sustaining disequilibrium and catharsis was not well managed and fizzled out. (Gibb, 2004: 747) Of course this is just one example, nevertheless one could argue that a strategy of creating disequilibrium amongst employees when dealing with subject matters such as Equality and Diversity or Bullying and Harassment would be counter-productive. Many victims of bullying or marginalised employees would perhaps be unwilling or incapable of becoming directly involved in a confrontational Theatre session with perpetrators, peers and management. Forum Theatre would seem to have the potential to be an effective tool in the consideration and analysis of organisational power dynamics and it is surprising that there is little theoretical or practical guidance, comment, discussion or debate in the literature about this. The issue of organisational power dynamics arguably feeds into how Forum Theatre can be harnessed effectively to analyse, tackle and assess important, sensitive, contemporary and controversial topics such as Equality and Diversity and Bullying and Harassment.

### **3.4 Theatre and Empowerment: Up to the task?**

#### **3.4.1 Empowering the community**

Much of the discussion up until now has focused on Forum Theatre. Considerable research, however, has been carried out on Community Theatre, which shares many similar tenets with Boal's Forum Theatre such as promoting democracy, participation, reflection, debate, discussion and active problem-solving. The significance of community-based performance today is frequently in the

process, not in the product, and the theatre work grows out of and strives to address the present-day needs, hopes, and culture of a particular, usually undeserved, community. (Nellhaus & Haedicke, 2004: 13) One could argue that there is very little to separate both Theatre forms in terms of their philosophy and application, however with Community Theatre there does appear to be a greater emphasis on the creative process rather than Boalian style revolutionary change. Both have been applied in circumstances of perceived oppression and hardship in an effort to encourage the participants to constructively collaborate in groups to develop pieces of theatre that seek to engage, tackle and evaluate their oppressive circumstances and rehearse scenarios to explore alternative and more positive behaviours, attitudes and modes of action. Much of the literature looks at specific case study examples in which Theatre practitioners work directly with groups of participants, who for the most part come from disadvantaged and marginalised backgrounds such as the homeless (Elam & Fowler, 2004; Westlake, 2004), war victims (Kuftinec, 2004; Fleming, 2002) and female victims of domestic abuse. (Beirne and Knight, 2004) The effectiveness of Community Theatre and Forum Theatre as a means of developing and improving upon traditional University Business Management teaching practice to encourage greater student participation, engagement and reflection whilst simultaneously transcending traditional, hierarchical power imbalances between the lecturers and students has also been researched and assessed. (Beirne and Knight, 2007; Monks et al, 2001) Successful outcomes will depend on the facilitator's ability to move and motivate participants, to harness their talent and energy, and to promote shared learning and collective working. (Beirne, 2006: 88) While the literature does address these points, there is little discussion or consideration of what the long-term benefits are of 'empowering' the participants. Indeed, identifying and assessing the long-term benefits may prove rather challenging. A possible strategy could be to create a preliminary framework in which participants and Artists discuss, debate and formulate provisional learning outcomes and aims. Gibb (2004) has picked up on this point by implicitly criticising the Artists' naivety for not clearly formulating and explicating what the learning outcomes and aims should be. However, many Arts Based academics have argued that the power of Arts Based Techniques is to provide sparks of insight by harnessing participants' subjectivities, anecdotes, emotions, experiences and other supposedly 'irrational' behaviours. (Denzin, 1997; Finley and Finley, 1999; Barone, 2001, 1997; Saldana, 2003; Mienczakowski, 1997, 1995; Kalb, 2001) To work towards meeting pre-determined outcomes and objectives would be counter-productive and arguably antithetical to aesthetic norms. Nevertheless Monks et al (2001) from feedback received following their Forum Theatre session pointed out that the audience, without working towards specific aims or learning outcomes, perceived the Theatre exercise in a light-hearted way, acknowledging some of the issues raised but admitting to not changing their

behaviours or routines that would amount to significant change in their working lives. One could argue that without some structure, pattern and dare I say it, a form of discipline, the effects of Theatre could be nothing more than transient.

Kuftinec's (2004) work with segregated communities in Mostar, Bosnia, Westlake's (2004) work with the homeless in Seattle and Elam and Fowler's (2004) work with the underclass in Palo Alto, California, highlight some of what one could argue are the most significant problematic issues. Empowerment through Theatre is proscribed by the authors as follows:

- individuals work collectively in order to articulate positions on issues and explore solutions to problems
- participants challenge dominant culture
- bring a marginalised community's perspective and history to others and their own attention
- improve participants' skills leading to an exponential improvement in society's skills currency.

One could argue that only the first point is addressed. For example in Mostar, Bosnia, attempting to frame what is the dominant culture is fraught with difficulty and potential danger. The facilitators make a brave attempt to bring communities segregated by religion, ethnicity and conflict together to develop a shared understanding and empathy of each others views, experiences, hopes and fears. Nevertheless, many members of the audience actually were of the view that much of the themes and issues that surfaced during the Theatre sessions were already well known to them. (Kuftinec, 2004: 58-67) Much of the audience cared more about landmine clearance, foreign investment, EU membership, job opportunities and diplomatic relationships with other Balkan countries and failed to see how Theatre could attempt to influence progress on these issues. Making an effort to improve participants' skills could be perceived as a cynical attempt to transfer the focus of attention and responsibility from a macro to a micro level. Indeed this is a salient issue in Westlake's and Elam and Fowler's work in which no constructive discussion or debate is conducted within the Theatre framework to detail how participants' lives can seriously change when Theatre appears incapable of challenging and changing society's embedded beliefs and attitudes at the macro-level. To be fair, all authors indicate that both time and resources were at a premium and perhaps it is unrealistic to suggest Theatre can achieve realistic, fundamental and lasting change. Beirne and Knight's (2004) study of a group of abused and marginalised women in Scotland is a much more detailed and sophisticated piece of research in which artists harness Community Theatre 'so that participants can

*believe* that their values and interests are shaping events, without the stifling interference of elitist, hierarchical or other debilitating influences [emphasis added]...Survival was now regarded as something to be celebrated.' (Beirne and Knight, 2004: 36, 39) The success of the Theatre sessions are described in colourful terms: 'it was a moving and emotional occasion, attracting fulsome praise and admiration for the strength, resilience and creative achievements of the group.' (Beirne and Knight, 2004: 39) Empowerment would appear to reside in the process rather than the outcome. There is no direct evidence of any tangible improvements in the participants' lives, other than a *belief* that they are gaining more control over their lives. How did the women fare over the next six to twelve months? Had their lives improved? If not, then were the Theatre sessions really of any benefit? Is one Theatre project sufficient to seriously change the participants' mental models, attitudes, behaviours and modes of action? Were the women confident enough to challenge society and reverse what Pierre Bourdieu would call their negative reputational capital? The inter-group dynamics between the women - the emergence of natural leaders, the possible existence of dominating and aggressive behaviours, perhaps even the emergence of bullying behaviours subtly taking place beyond the radar of the facilitators, despite the agreement and commitment to a learning contract – may have had an impact on the empowerment process and could have led to some voices being heard more than others. McConachie (2004) discusses how the role of the Artist as facilitator can be compared to that of a colonialist, influencing and even distorting the participants' narrative by consciously or unconsciously bringing to bear their own political and/or philosophical beliefs on the Theatre process. An issue that is not properly addressed in the Beirne and Knight case study or in any of the case study examples up until now. As a footnote, it is worth bearing in mind however that a case study analysing a specific Theatre event cannot hope to incorporate all contributory and/or affective phenomena that can have a bearing on issues of power dynamics and the empowerment of the participants. Much of what has been written is detailed, informative and certainly helps to map out many of the important issues.

### **3.4.2 Empowering the workplace**

One could argue that determining and assessing the long-term benefits of a workplace Theatre intervention may prove to be easier in what is arguably a more sober environment when compared to the highly sensitive and emotionally charged scenarios discussed in the previous sub-chapter. However, the literature is ambiguous at best in its efforts to determine whether the Theatre interventions proved effective in empowering participants. This ambiguity exists primarily because

of the fundamental difference between one's perception of workplace participants and participants taking part in the previous examples. Not wishing to undermine or trivialise employee issues, one can perhaps be forgiven for coming to the conclusion that by comparison, employees are in no way experiencing or have experienced the same level of trauma, oppression and danger in the workplace that the marginalised participants in Beirne and Knight's case study, for example, have experienced. Applying the same Arts Based empowerment criteria discussed earlier to assess the effectiveness of a workplace Forum Theatre intervention is perhaps inappropriate and only seeks to undermine its potential. Conversely, one could argue that an Arts Based empowerment strategy is exactly what organisations require to boost employee participation and productivity. There are caveats however. A fully democratic, participative, unshackled and improvised Theatre intervention will sit uneasily and will arguably be ineffective when implemented within an organisation that clings to a Taylorist and Fordist command and control industrial order. The prevailing culture will not be supportive or have the necessary resources in place (Beirne, 2006: 62) to deal with and support an Arts Based intervention that seeks to challenge the dominant culture and allow for 'marginalised' employees' voices to be heard. The term 'marginalised' is applied loosely as one is assuming that employees believe themselves to be marginalised. Employees may be socially conditioned to accept the organisational culture as a given. Lukes' (2005) third dimension of power outlines how some organisations seek to inculcate their employees thus insidiously pulling a veil over their eyes to mask the truth of the organisational oppression being mastered over them. Employees being faced with taking part in a Theatre intervention may inadvertently seek to consolidate organisational culture rather than seek to undermine it. Rather than that some organisations appropriate Theatre for the promulgation of existing ideology and cultural values and symbols by 'drilling' Theatre companies in advance on what scripts should be used and how the Theatre session should be facilitated. (Nissley et al, 2003; Clark & Mangham, 2004a) Creating a liminal space (Coopey, 1998) would arguably be impossible and a waste of resources. Some organisations have gone as far as eschewing any form of participation and any likelihood of the dominant culture being questioned or challenged by commissioning Corporate Theatre events, a traditional pantomime style, effects laden extravaganza that reinforces organisational culture and ideology to a passive audience. The audience members, employees of two merging banks, were seen to be 'dancing in the aisles' and very much enjoying the show. (Clark & Mangham, 2004b) Despite this there is no evidence to suggest that the show was anything other than passive, transient entertainment that would have any lasting or significant impact on the employees themselves or on their working conditions. Fair to say that the authors provide no evidence or detail on existing organisational employee relations and the organisational culture. Can one assume that an organisation using a Corporate Theatre event is

deliberately setting out to 'brainwash' its employees when there is no evidence to confirm or deny this? A bold statement.

The difficulty with the literature is that little consideration is given to employees' views and opinion on the Theatre sessions. For example in Forum Theatre, do employees *really* want to take part? If not, then an organisation is faced with a dichotomy, should they exhort and coerce employees to take part in what is billed as a democratic and collaborative project, thus contradicting Arts Based norms and generating unhealthy levels of cynicism and possible negative undermining behaviours, or instigate a voluntary participation policy? If the Forum Theatre subject matter involved Equality and Diversity issues such as Bullying and Harassment, those in most need of taking part such as the perpetrators of bullying behaviour may choose not to attend and the potential for any lasting and significant change may be mitigated.

There would appear to be considerable gaps in the literature on how Forum and Community Theatre can be applied constructively and effectively on a whole range of important issues such as Equality and Diversity, conflict management, change management and, of course, empowerment. On the latter issue, there is considerable scope for researching how Theatre and Arts Based Interventions in general can be applied alongside existing strategies such as Teamworking and High Performance Work Systems. The door is wide open, it would seem.

### **3.4.3 Theatre and Ethics**

Many bold statements have been made on the egalitarian efficacy of Arts Based Techniques and Interventions. Other than what has been discussed already, Lincoln (1995) and Denzin (2000) outlined the following criteria Arts Based Projects should attempt to emulate:

- improve participants' participation;
- empower participants to articulate issues in a creative and collaborative way in an effort to reframe their perception of reality to explore alternative ways to improve their quality of life and those around them;
- encourage positive, creative, innovative, constructive, multifaceted and sophisticated expressions of feelings and emotions;
- develop long-term benefits;
- overcome political and cultural obstacles.

One could argue that these guidelines are highly ambitious and idealistic. They also raise ethical alarm bells when researching a workplace Theatre intervention. Parading a workplace Theatre workshop based upon the above may give a false sense of hope, especially if management commitment and support to dealing with the issues raised is lacklustre. Also, making choices in a fictional situation has very little cost, whereas in actual life the cost can be great. So, even if community-based performance displaces spectators and actors with “spect-actors” and fosters a dialogue within the community, ethical and political concerns remain. If the participants are falsely taught that they can change circumstances that in fact are beyond their reach, then the work not only is dishonest and cruel but also powerfully preserves the status quo by defusing the participants' anger and frustration. It offers them a temporary “feel-good” solution while robbing them of the impetus toward real action. (Nellhaus and Haedicke, 2004: 17) Theatre has the potential to unearth and raise serious and previously hidden or taboo topics that may cause considerable tension and conflict. Having only one or a limited series of Theatre sessions may be insufficient to deal with the emotional fall-out generated. Artists as facilitators and management must be prepared to commit to the long haul and the costs and resources needed to fulfill this.

## **Chapter 4**

### **Participant Observation Notes**

The purpose of these notes is to provide a detailed record of the Theatre sessions according to Spradley's list of generalised concerns. (Wolfinger, 2002) The issues raised will be analysed and discussed in much greater depth in Chapter 4:

- **Space** – Theatre sessions took place within a medium sized conference room at Glasgow Caledonian University, maximum capacity in the region of 30 people. The action was played out at the front of the conference room in close proximity to the audience, without the use of a traditional theatre stage, facilitating audience direct participation. There were three rows of classic, linear theatre-style seating with the majority of the audience sitting in the front two rows. Five attendees out of the nineteen chose to sit at the rear in the first session, 4 in the rear at the second session, this despite there being remaining spaces left vacant in the first and second rows. The view from the rear was slightly impaired by attendees sitting in front but arguably insufficient to obstruct or to reduce involvement as much of the action could still be viewed clearly and distance was close enough for attendees to be heard without voices being raised above a normal conversational level. Indeed, the rear attendees at both sessions proved to be the most vocal and constructive participants. To the rear of the conference room was a designated space called 'the neutral zone'. Here, the actors, upon completion of a scene, would remove themselves to away from the audience gaze allowing the audience to focus on the facilitator, who would explain what had happened, encourage debate and introduce the next scene. The audience, to clarify specific points, could ask the facilitator to invite the actors back on stage to replay a scene. While in 'the neutral zone' the actors became themselves and the audience were instructed not to interact with them directly, only through the facilitator.
- **Actors** – the people involved. The first session had 17 audience members and 19 for the second including myself as participant observer. The facilitator was reluctant to allow more than 20 attendees believing this would impact on the effectiveness of the Forum Theatre

session. Much of the audience were comprised of Equality and Diversity Directors from Public Sector organisations. The Theatre company were represented by the facilitator and three professional actors.

- **Activity**

### **Background**

Attendance was purely on a voluntary basis. The Theatre sessions were included within the Innovate to Integrate conference agenda and audience members could have chosen to participate in other events and sessions that were scheduled between the two time slots of 10am to mid-day and 2pm to 4pm. The aim of the Innovate to Integrate conference was to 'bring a fresh approach to diversity; particularly relating to equality in relation to age, religion and disability, with a focus on mental health issues with regards to the latter topic.' Audience members could have chosen to attend other sessions from other organisations including BBC Scotland, Nil By Mouth, Glasgow Works, Strathclyde Police, National Australia Group, Scottish Association for Mental Health and the Employers Forum on Age.

### **The Audience**

Audience members appeared very interested and very keen to become involved having chosen to attend of their own volition. I made it my intention in both sessions to be the first arrival, allowing me to monitor audience interaction prior to the Theatre sessions getting underway. In the first session none of the audience members appeared to know each other. There was no evidence of any groups sitting with each other and several people were rather tentative in terms of deciding where they should sit and who with. I was seated to the left of the rear row of seats and no-one chose to sit next to me. There is no evidence to suggest that I had influenced where audience members chose to sit. The second session was slightly less tentative in that several audience members had been introduced to each other during lunch and there was evidence of these people choosing to sit next to each other in the front row. I distinctly overheard people talking about the 'success' of the first session; expectations were high it seemed. There was no evidence of any negativity, cynicism or antagonism prior to the Theatre sessions beginning. There was also no evidence of any deliberate strategy to

undermine, exaggerate or promote any aspect of the Forum performance that would deflect others' perception of and obstruct others' involvement in the performance. Audience members participated fully and constructively in both sessions, some audience members being more vocal than others, especially those sitting in the rear. Audience members who chose not to speak nevertheless appeared to be listening actively and were taking notes on the proceedings and occasionally reinforced another audience member's views by an affirmative nod of the head or an assertive 'yes' exclamation.

### **The Actors' Performance**

Besides the facilitator there were three professional actors. At the beginning of the session the facilitator quickly introduced himself, explained the purpose of 'the neutral zone', provided some background information concerning the content of the performance and explained the rules and the dynamics of Forum Theatre. The performance centred around an apparently dysfunctional working relationship between two Student Support Service colleagues and their line manager in a Further Education college. The identity of the FE College remained anonymous, nevertheless the facilitator explained the performance was based on real events and robust research had been carried out with the employees concerned to ensure the actors' depictions were authentic. The action began with a female employee, Kathleen, asking a male employee, Adrian, whether he would like to go to a night-out with other staff members. Kathleen appeared to be jovial, assertive and rather loud and forceful. Adrian, on the other hand, appeared shy and withdrawn – his shoulders were slouched, eyes down and head lowered. His response was brusque, 'I don't want to go'. Kathleen responded, 'Ach, c'mon, it will be fun.' Kathleen continues to press him to go to the night out. Adrian eventually responds aggressively in a raised voice, 'I don't want to go...please leave me alone to do my job.' Kathleen is apparently shocked, backs away and acknowledges Adrian sheepishly, 'ok...ok.' Adrian's body language is continually locked in the same position throughout the scene and never once raises his eyes to meet Kathleen's. Despite his aggressive tone of voice there is no physical intent. At the end of the scene, the actors return to 'the neutral zone'. The facilitator introduces the next scene in which Kathleen approaches Adrian and hands him an envelope. Adrian opens the envelope to discover a 'Get Well Soon' card. Kathleen explains that they, meaning herself and his colleagues, bought the card because they were 'concerned' about his sickness absence on the Friday, the day after

Adrian's aggressive response to Kathleen's behaviour. The card contains a vulgar reference to Adrian's genitals, which Adrian reads out to the audience. Kathleen continues to make jokes and pats Adrian on the shoulder in a jocular, mocking gesture. Adrian then shouts very aggressively and storms out of the room. Kathleen stands still with hands on shoulders watching Adrian leave with a look of disbelief. She then declares Adrian to be a 'weirdo' and walks off stage to 'the neutral zone'. The facilitator then introduces the next scene and explains to the audience that they can now become involved in the action. The scene depicts a meeting between Kathleen and Fraser, her line manager; Kathleen is making an official complaint about Adrian's 'aggressive' behaviour. The audience is asked to advise Fraser on how he should deal with the situation more effectively by freezing the action; this involves the audience member putting their hand up in the air, declaring the word 'freeze' and then interacting directly with the actor portraying Fraser. The actor is assertive with the audience members believing his methods to be appropriate, pressing the audience to explain why he should adopt their recommendations. For example, an audience member told Fraser to listen more carefully to Kathleen and adopt more conciliatory language. Fraser believed he was already adopting this behaviour, however following a debate, Fraser continued his discussion with Kathleen having altered his behaviour, language and demeanour accordingly. This change in approach would be matched by a different response from Kathleen, who responded more positively. At the end of the discussion, through probing and listening more effectively, Fraser became aware of the 'Get Well Soon' card. I should also point out that during the scene, the audience could gain an insight into the characters' innermost feelings. This could be done by an audience member requesting the action be 'frozen', the facilitator touching the shoulder of a character and the character declaring to the audience how they felt. The purpose is to expose the character's feelings and highlight the consequences of the other character's behaviour, attitude and approach to the situation. As the scene unfolded, following several audience recommendations, the characters' feelings became more positive and less confrontational. The final scene was between Adrian and Fraser. Fraser outlines Kathleen's allegations concerning Adrian's behaviour and 'poor' attitude and asks about the 'Get Well Soon' card. Prior to this Fraser appears rather dismissive of Adrian, seemingly unimpressed by Adrian's negative body language and laconic responses. Again, the audience is invited to interpose and several audience members advise Fraser to be more empathetic, sensitive and patient. Once again, we are given an insight into the characters' thoughts as the action progresses. Eventually, Adrian reluctantly hands over the 'Get Well Soon' card and Fraser agrees to take action against the perpetrators.

An audience member freezes the action and asks Fraser to try and determine the causes of Adrian's detached behaviour. Following a line of questioning it transpires that Adrian has Asperger's Syndrome, a condition he hasn't disclosed to his employer. Due to time constraints in both sessions it was not possible to have a further scene to explore this issue further. It should also be pointed out that rehearsals were carried out beforehand, nevertheless improvisation was central to the actors' performance, whose job it was to interact effectively with the audience, take on board the recommendations given, and continue the performance in the pattern of the audience's choosing.

Following the Forum Theatre session the facilitator and the three actors took part in a 15 minute question and answer session with the audience. Much of what was asked by the audience I incorporated within an in-depth semi-structured interview carried out at a later date with the facilitator who is also the Director of the Forum Theatre company. Please see Appendix 5 for the full transcript.

- **Object** – The theatre company used minimal props. The facilitator explained that they did not want to recreate a traditional theatre stage, in which there are strict barriers between audience and actors. To foster interaction and participation, actors would perform directly in front of the audience at the same level – no raised stage – and use props such as a table and two chairs that one would expect to find in a manager's office for the two scenes between Fraser and Kathleen and Fraser and Adrian that would add to, not detract from the audience's perception of an authentic work setting. The actors' clothing also reflected their status; Fraser and Adrian wearing open, light coloured shirts and smart trousers, Kathleen wearing smart trousers, heels and a white blouse.
- **Time** – The Theatre sessions were scheduled to take place over two 2-hour sessions. It was apparent that the actors and facilitators had clearly planned and rehearsed their performance to a degree that they felt confident that an effective and successful Forum Theatre session could be achieved within this timeframe.
- **Goal** – the things people are trying to accomplish. The Forum Theatre company's principal goal was to demonstrate that Forum Theatre can be an effective intervention in raising awareness of, analysing and tackling issues of Equality and Diversity in the workplace. There are many strands to Equality and Diversity and the Theatre company chose to focus

on bullying, harrassment and misunderstanding linked to an employee's undisclosed mental illness. Supplemented to this, the Forum Theatre company wanted to demonstrate Forum Theatre's effectiveness at managing employee behaviours, encouraging active problem solving, challenging assumptions, discussing different employee perspectives, testing and debating possible future strategies and encouraging participation and interaction amongst staff and management. Whether these goals were met will be discussed in more depth in Chapter 5.

From several informal discussions with other audience members, it would appear that their primary goal was to experience firsthand the efficacy of a Forum Theatre workshop. Much of the informal feedback was positive and the interviews with four attendees demonstrated a positive, if perhaps cautious view. Again, this will be discussed in more detail in Chapter 4.

- **Feeling** – the emotions felt and expressed over the Theatre sessions. One of the actors' primary objectives was to demonstrate the range of feelings experienced by employees involved in a situation of bullying, harrassment and misunderstanding as a result of an employee's non-disclosure of a mental illness. The actors certainly went for the emotional jugular, presenting a visceral, roller-coaster ride of anger, confusion, disgust, frustration, empathy, sympathy and relief. The Theatre session was not structured like a traditional play – introduction, engagement, confrontation, resolution, conclusion – nevertheless the emotions on display were akin to the visceral impact felt in a Shakespearean tragedy. At times the visceral impact was admittedly very powerful, but whether this helps to elucidate the goals is undoubtedly open to question. The audience response to the emotion following informal discussions after the sessions was one of surprise. Some audience members admitted to feeling uncomfortable and uneasy with the level of melodrama on display. Nevertheless, during the Theatre session, many of the audience members were actually becoming emotional too, in the sense that they felt aggrieved and annoyed by Fraser's initial lack of empathy, patience, receptivity and sensitivity.

## **Chapter 5**

### **Research findings**

Findings are discussed in relation to the theoretical issues raised in the literature review chapter:

- was the Forum Theatre method effective at analysing organisational power dynamics
- was the method democratic allowing everyone an opportunity to contribute
- did it empower the audience to explore solutions effectively by allowing individuals to work collectively, challenge dominant organisational culture(s), bring the marginalised's perspective to the participant's attention and improve participants' skills

Other issues to be discussed include those related to the Forum Theatre sessions witnessed:

- was it effective at raising awareness and tackling sensitive issues related to Equality and Diversity such as Bullying and Harassment
- was it effective at changing attitudes and behaviours
- did the actors' performance distort what actually happened at the Further Education institution
- how can Forum Theatre be implemented effectively over the long-term to address Equality and Diversity issues
- what challenges would be encountered when implementing Forum Theatre within an organisation.

The following discussion will be based upon my own findings and views and opinions expressed from three audience members and the Theatre company's facilitator, who were interviewed by myself at various dates following the Innovate to Integrate conference at Glasgow Caledonian University. A further participant completed a questionnaire based upon the semi-structured interview guidelines.

## **5.1 Organisational Power Dynamics**

The Forum Theatre session arguably failed to effectively demonstrate to the audience how it could accurately convey power dynamics and relationships within an organisation. The subject matter, discussed extensively in the previous chapter, required a robust analysis and consideration of existing power dynamics within the student support services department at the College. Depicting only three characters does not provide enough background information to fully explore why Kathleen, the perpetrator, behaves as she does. The actors' depictions of Kathleen and Fraser, her line manager don't provide any clues as to how, for example, the organisational structure and culture contributes to and would appear to nurture a rather hostile environment. What we *are* shown is a line manager who actively fails to engage constructively and effectively with his staff. What was surprising for an audience of Equality and Diversity professionals was the lack of any questioning during the interactive process about management's record of engagement with its staff – an issue prevalent in the literature. (Hoel, Cooper and Faragher, 2001) It is not clear from viewing this production whether it is the apparent failure of the Theatre company to fully understand and integrate issues of power within this piece of Theatre or whether Forum Theatre itself is limited in its ability to accurately and effectively portray power dynamics within an organisation. An issue already reflected in the extant literature. The Theatre company would appear to be demonstrating a level of naivety and misunderstanding of the complexities involved in the analysis of organisational power dynamics, an issue echoed by the facilitator himself, 'authoritarianism lies in the personal ways that managers choose to manage and the way they choose to engage with people. I don't think you get...my own experience is that I would hesitate to define an organisation as authoritarian...I define it as hierarchical.' When implementing Forum Theatre sessions on sensitive, controversial and multi-causal (Salin, 2003) Equality and Diversity issues such as bullying and harassment, one could argue that it is vital for the organisers to have a full and complete understanding of the complexities involved. By failing to recognise the importance and impact organisational structures and cultures can have on employee behaviour can potentially lead to a possible neglect of an effective analysis of a commissioning organisation's support structures and existing Equality and Diversity policies. Indeed, interviewees 1, 2 and 5 all make reference to the need for robust support

structures to tackle the issues Forum Theatre raises.

## **5.2 Forum Theatre process: democratic?**

Prior to the Forum Theatre session taking place the facilitator provided a brief outline of the scenario to be depicted to the audience. The audience were not given an opportunity to ask questions, neither were the audience asked what their expectations of the sessions were that perhaps would have allowed for an insight into the general mood towards the session and assess at the end whether the Theatre company had succeeded in changing audience members' perceptions of the event. A point picked up on by interviewee 5:

'I think [the facilitator] dived into it without I think possibly...assessing or reflecting people's own background or even expectations...and then got back to the group...and say, 'well, how did we marry up? How did we match up?'

It was at this point that a short preliminary debate could have taken place to gauge from the audience what issues in the Theatre piece would be important to them. Preliminary discussion would also have allowed the audience an opportunity to bond with each other, perhaps introduce some humour and help establish trust and solidarity in the group. (Gibb, 2004:746) This would in turn have helped some audience members to gain more confidence to become involved in the interactive process. There is no evidence to suggest, however, that some audience members remained less active as a result.

Many authors argue that Arts Based Techniques such as Forum Theatre thrive on a vibrant, 'pluri-vocal' approach, Boal himself making the point that Forum Theatre must do all it can to encourage constructive and positive contributions from all the participants. (Boal, 1979) There is no evidence to suggest that there was sufficient mechanisms in place to ensure everyone present had an opportunity to have their voice heard. Interviewee 1 makes the point:

'you need to manage the interventions that people are making and, again too, there's always when you have an audience there are some people that are more likely to speak than others and somebody should be making sure that there are equal opportunities to speak...not just the first person who always speaks.'

Everyone had an opportunity to speak, however there is always the danger that strong vocal personalities may dominate proceedings and it is important that the facilitator clearly explains in advance that Forum Theatre provides an opportunity for everyone to contribute and to actively and subtly encourage contributions from quieter members. In the workplace, those quieter voices may be those participants who have direct experience of bullying and harassment and may have important and constructive contributions to make. The more people who are prepared to speak allows an organisation to determine the existence of a diverse range of views on a topic; interviewee 1 makes a telling point here:

'you'll...find that...people have different views on what they think harassment and bullying is and then you would use that...to gauge a larger proportion of your people.'

An effective democratic process will also hinge on the synergy between the audience and the subject matter being presented. Interviewee 2 makes the point:

'I suppose {Forum Theatre is} limited by the experience of the group to some extent...if the group...weren't...articulate or...if they weren't going down the right path in terms of the training element of it or what was expected to...come out of it in terms of the objective, I suppose the facilitator would maybe be a bit more directive.'

Audience members who lack the ability, knowledge and experience to engage constructively with the subject matter may require training prior to the Forum Theatre intervention.

### **5.3 Audience empowerment**

An Arts Based empowerment model as detailed previously is ambitious, perhaps even idealistic and is open to alteration, critique and improvement and arguably doesn't account for contextual requirements, demands and challenges. Nevertheless, it allows one to compare and contrast the success or otherwise a Forum Theatre intervention has had in genuinely empowering the participants to have the confidence, the ability and the knowledge to move forward and tackle the issues raised.

### **5.3.1 Collective working**

Many of the interviewees commented on the ability of Forum Theatre to apparently empower the audience. However, there was no evidence of any collective working amongst the audience. Indeed, the audience members were questioning and interacting with the actors as individuals, not as part of a group. There was no opportunity for the audience to discuss either before or after the session in groups to formulate a more detailed response to the issues raised in the Forum Theatre session or to suggest improvements in the process itself. The facilitator failed to gauge audience understanding or initiate a discussion at the end on how the issues raised could be used positively by the individuals themselves.

### **5.3.2 Challenge dominant organisational culture**

As discussed previously the session failed to portray sufficient background on the organisational culture. Without forming a recognisable, accurate portrayal of the organisational culture then there is essentially nothing to challenge. Audience interaction was limited to challenging Fraser's behaviour and effectiveness when interviewing Kathleen and Adrian. One has to beg the question whether the audience suggestions could in reality be realistically implemented by Fraser, if those suggestions are inappropriate or even antithetical to the organisational culture. At no point was the question raised as to whether Fraser's personality and ability was robust enough to push through radical changes. Indeed, one wouldn't know how to define 'change' as one doesn't know which point one is moving *from*.

### **5.3.3 Exposing the marginalised's perspective**

Several of the interviewees have pointed out that the Forum Theatre session was effective in raising awareness of how bullying victims feel. What was particularly impressive was the 'shoulder' technique involving the facilitator touching a character's shoulder, which would freeze the action. The character would then reveal what they were thinking and how they felt as a result of their interlocuter's behaviour. From Adrian's perspective one could argue that the session was very powerful in drawing attention to the fear, confusion and isolation he felt as a result of his

colleague's behaviour. Conversely, one gained a valuable insight into the perpetrator's perspective. It was clear Kathleen did not fully understand and was not aware her behaviour was inappropriate, especially not realising Adrian had Asperger's syndrome. This caused her to feel as if *she* were the one being victimised by Fraser. Indeed at this point the issue of which character was marginalised was not entirely clear. The facilitator did not reveal Adrian's medical condition until the end of the Theatre session, therefore the audience were denied the opportunity of becoming involved in Fraser's handling of this situation or gaining further insight into Adrian's predicament at this point. One could argue that the Theatre company themselves would be unsure about how to proceed beyond this point. With little understanding or explication of the organisation's culture or management processes it would be very difficult to provide an accurate portrayal of the outcome of Adrian's apparent non-disclosure and how Fraser would cope with the complexities that would create. Interviewee 3 makes the point that 'the Asperger's issue would be a step too far for most middle managers.' Perhaps a step too far for Forum Theatre too?

One also has to be careful about how one labels characters. It might be easy to label someone as being on the margins, another as an oppressor. However as Nissley et al (2004) have pointed out it is too simplistic to suggest such a bi-polar relationship. At the end of the Theatre session one had the feeling that Kathleen had been labelled as the insensitive oppressor, Adrian as the oppressed and Fraser as the ineffective manager.

#### **5.3.4 Improving participants' skills**

Interviewee 3 makes the point that the Forum Theatre company were, 'preaching to the converted.' Indeed there was no evidence from this example to demonstrate that participants' skills and knowledge in Equality and Diversity issues had been improved upon. Of course, demonstrating how Forum Theatre works and some of the positive aspects it can bring to an organisation was certainly new to a number of participants but that does not equate to an improvement in their skills. Suggesting alternative strategies to the actors and testing them out, one could argue is one way of improving upon one's skills but again there was no evidence that any of the audience suggestions and interactions offered something new to themselves or to anyone else. A number of interesting points were raised, however as Interviewee 5 has pointed out:

'when the audience started to articulate suddenly I thought we were pressed for time and then we were kind of almost...moving on rather than hold onto that particular perspective or particular angle.'

An issue echoed by Gibb (2004) in his assessment of a Forum Theatre session.

Claims for Forum Theatre being an effective technique at empowering participants based upon this session are well wide of the mark. Of course, this session did not comply with Boal's philosophy and did not measure up to general Arts Based egalitarian criteria. However, this is just one production and conclusions cannot be drawn. However, it does raise the question whether an Arts Based empowerment proscriptioin is appropriate for a corporate or Public Sector setting. If not then one could argue that Forum Theatre ceases to become an Art form and instead becomes a technology. (Clark and Mangham, 2004b) Theatre practitioners may then have to question whether their interventions can truly be promoted as being a collaboration between Arts and Business.

#### **5.4 Forum Theatre: effective at raising awareness and tackling sensitive issues related to Equality and Diversity such as bullying and harassment?**

There appeared to be a general consensus amongst the interviewees that Forum Theatre was a useful technique of identifying bullying effects on the victim and generating discussion on how managers can learn how to deal more effectively and sensitively with emotionally charged one-to-one interviews. Interviewee 5 offers some words of caution believing actors are not necessarily the best people to use as they 'lack passion', not being the ones having experienced or survived the workplace bullying depicted. The facilitator argued however that they would always strive for 'believability'. To do this they would carry out research inside the commissioning organisation prior to the Forum Theatre sessions taking place by interviewing members of staff other than from HR and management to create a narrative: 'we focus our research on stories because effectively what we're doing...we're creating a narrative'. This mirrors Eisner's (1997) and Barone's (2001, 1997) theoretical argument of creating a narrative that cuts across and makes sense from the many different voices. However, as Pierre Bourdieu argued, one perhaps cannot hope to capture the full complexities, contradictions, nuances and inconsistencies of human behaviour by creating such a narrative. (Jaervinen, 2000) Indeed, one could argue that some employee views and perspectives might be missed out at the expense of creating a linear, understandable and accessible narrative.

There is also the question who makes the choice whose voices are heard. (Nellhaus and Haedicke,

2004) The Theatre company's preparatory research mirrors that carried out in Ethnodrama/Ethnotheatre, in which researchers would create narrative scripts from interviewee transcripts. Researchers would both verify the content of those scripts with, and rehearse the play in front of the research participants prior to the performance. This allows for the research participants to offer valuable feedback on the research process allowing for their voices to be more accurately heard. (Mienczakowski, 1995, 1997; Finley and Finley, 1999; Conquergood, 2000) There is no evidence the Forum Theatre company have gone to these lengths other than reporting back their research findings to the HR department prior to finalising their business proposal to the organisation. It is quite clear that the proposal would be considered by HR and management with no evidence of any input from employees in the decision-making process. Interviewee 5 makes an important point:

'the people who the performers are [should] relate directly to individuals behind the scenes and not maybe with management...and just come out with a fixed outcome that [management] want.'

The question this raises is whether the Theatre company are offering such an accurate and 'believable' reflection of issues surrounding bullying and harassment. For such an emotionally charged and psychologically damaging phenomena such as bullying and harassment, one could argue that failing to involve employees *fully* throughout the commissioning process – allowing employees to assess, offer feedback on and contribute to the Theatre company's proposal and allowing them to be part of the decision making process – is unethical. Also, not allowing employees greater involvement is a missed opportunity for the commissioning organisation to gain a valuable insight into the 'true' political nature of their organisation. Allowing politics to bubble up to the surface could also be invaluable at gaining insights into the organisation's sub-cultures and power dynamics.

### **5.5 Changing attitudes and behaviours**

Interviewees 1 and 2 were positive about Forum Theatre's ability to change attitudes and behaviours by encouraging self-reflection and exploring different behavioural strategies on stage allowing the audience to reflect on the outcomes. However interviewee 2 and 3 offer caveats in the form of a potential conflict of synergy between audience and subject matter. The danger lies with what interviewee 3 points out that a Forum Theatre production is 'preaching to the converted', offering nothing new for the audience to explore or move forward with. There is also arguably a

fundamental problem with a Forum Theatre process that uses professional actors – the audience are actively trying to change the attitudes and behaviour of a *fictional* character rather than 'real' employees. The process continually focused on changing Fraser's perspective and one could argue the facilitator failed to turn that focus outwards towards the audience members. After all, Forum Theatre is about exploring the participants' attitudes and behaviours. In this example, there was no evidence of any attempt to gauge or measure whether the participants' attitudes and behaviours had altered as a result of the Forum Theatre session. The majority of the audience, by means of informally chatting with them during the lunch-break, appeared very knowledgeable in Equality and Diversity issues and were used to sensitively charged one-to-one interviews with victims and perpetrators. The end result one could argue was a feeling of dissatisfaction that the facilitator didn't 'push the boundaries' far enough as interviewee 5 puts it, who also criticises the actors' 'melodramatic' performances. Undoubtedly, the Forum Theatre session had a powerful, visceral quality seizing one's attention. However, this melodramatic quality arguably highlighted the superficiality of the process. This is problematic for two reasons; a) melodrama dilutes 'believability', one could argue and b) audience members become swept along by the 'entertainment'. This dichotomy between the visceral and the authentic creates difficulties for a strategy seeking to make a serious effort at changing negative attitudes and behaviours associated with bullying and harassment.

Interviewee 5 points out that one of the principal causes of bullying and harassment is:

'a lack of people skills...[a failed realisation] of [one's] own abilities...seeing others as a kind of challenge to them...it's about confidence level and articulation level.'

One could argue that raising confidence levels, improving articulation and realising one's own abilities would be better served by replacing professional actors with employees themselves. It is obvious that the bulk of the focus should be on the employees, as they are the ones who must take the responsibility to implement action plans informed from the Forum Theatre sessions' findings to alter negative attitudes and behaviours or improve self-esteem. Interviewee 5 also proposes bringing in survivors and former perpetrators of bullying alongside professional actors, people who can 'inspire' participants by providing them with living proof that they have been through the bullying process and have 'come out the other end'. Representatives from professional bodies such as MIND (National Association for Mental Health) and the Samaritans, representatives who have seen first hand the emotional and psychological fall-out from bullying and harassment can also become

directly involved. Better still, if these people have experienced a previous Theatre workshop that has made a positive contribution towards the process of reconciliation allowing them more authority to influence the facilitation process. These people may be in a position to offer more accurate, realistic and practical guidance on how participants can alter their attitudes and behaviours and what support mechanisms management should implement to nurture and sustain these changes. They may also be in a better position to provide more accurate feedback on participants' Forum Theatre interventions and problem-solving suggestions.

There was unanimous agreement amongst the interviewees on the need for more than one Forum Theatre session to successfully change participants' attitudes and behaviours. One Forum Theatre session may be successful in simply raising awareness, however changing long-held assumptions is arguably not an easy process. Rolling out a series of Forum Theatre workshops may be the answer, however the financial costs attached may be prohibitive. Again, there was unanimous agreement amongst the interviewees including the facilitator that Forum Theatre can only be effective when included within a broader package of interventions. Careful consideration would have to be given on what other interventions can be used and how Forum Theatre would complement them effectively. Another difficulty is the diverse range of attitudes and behaviours employees have. One has to consider how a Forum Theatre workshop can be designed to unearth, accommodate and tackle this plurality of thought and the potential for serious conflict that could destabilise the whole project. Unfortunately many of these issues were not addressed during the Theatre session witnessed.

### **5.6 The actors' performance**

As discussed previously there has been some criticism on the actors' performance and discussion has taken place on problems this could present. Nevertheless, there are advantages to using actors and these positive aspects were demonstrated in the Forum Theatre session. Interviewee 2 argued that professional actors bring a more 'objective', 'dispassionate' and perhaps a more realistic portrayal of events. Using employees to create their own theatre would be 'going back to a sort of just getting people to do role-play then and I think then you do get people's own agendas and their own experiences coming in.' Using professional actors 'with experience in Equality and Diversity' would present a better opportunity of more fruitfully exploring sensitive issues. However, as Nissley et al (2004) have argued, less input from employees can mean less insight into the political

nature of the organisation. The facilitator freely admits:

'[using actors] is distorting reality because it's artificial...all art is artificial...that's the point of it...it's not real and it's actual power and strength lies in the fact that it isn't real but it's allied with the fact that these adults we're working with have exactly the same ability as the young people I used to work with in an education context, all willingly suspend disbelief, in order to explore what it might mean for reality and so people have a much more sophisticated approach...because they know it's not real...they know they're actors.'

The fact it's not real is what poses the biggest ethical problem. Representing real employees vicariously so to speak raises questions about whether the employee is being fairly and accurately represented. Actors must improvise when challenged by a member of the audience and one could argue whether an actor can be fully aware of the constraints of the character to such an extent that the improvised response is accurate. Interviewee 5 makes a telling point when comparing the use of actors and employees:

'the analogy I would like possibly to illustrate would be, if you look at TV serials as well as documentaries, there's a difference...the impact of a documentary based on real victims and so on compared to a drama that tried to portray people in those situation...[TV dramas] would lack [authentic] emotion.'

This is a key point because an Arts Based philosophy believes participant emotion and subjectivity to be vital elements in its epistemological canon. Ethnodrama has demonstrated a robust process in ensuring research participants' feelings, emotions and experiences are explored and reflected as accurately as possible. In this example of Forum Theatre there is no evidence that an Arts Based philosophy has been adhered to however. One could argue that using employees directly is the only way to fully explore participants' emotions and thereby gain a deeper understanding of their background and how they interact with others and their environment. Going back to the previous section, the inclusion of authentic emotions may enhance understanding of a participant's attitudes and beliefs. Nevertheless, there is always the problem on encouraging employees to take part and in some circumstances commissioning organisations may consider the only feasible way to encourage greater employee participation is to use professional actors despite the increased costs attached to that.

### **5.7 Long-term implementation: hurdles and assessment**

Unfortunately no discussion took place after the Forum Theatre sessions that properly addressed some of the challenges that an organisation would likely encounter when attempting to implement Forum Theatre. Interviewees have unanimously agreed that a one-off Theatre session may be successful as a preliminary measure to raise awareness of issues surrounding bullying and harassment but its short term ability to introduce change is limited. Agreement was unanimous that Forum Theatre would have to be implemented over a long-term period for it to produce any tangible results. Assessing those results poses problems however and one must confess that it was a great disappointment that this issue was not discussed during either the Theatre sessions or in the conference. The facilitator when interviewed was somewhat ambiguous and uncertain about Forum Theatre's ability to produce clear and compelling long-term benefits to any of their clients. There was mention that 'evidence is being collected' to determine the success thus far, but no further details were offered. The other interviewees offered some insight into how they could assess the results but lacked any clarity or structure. For example, interviewee 1 discussed the need to interview participants following the Theatre sessions to determine what issues were raised and identified and how they could be incorporated into a learning and development programme. Interviewee 2 believed that success could be plotted against a quantitative measurement of the number of bullying and harassment incidents reported in conjunction with a series of interviews with participants to determine their views on whether there has been positive changes in the organisation's culture and environment. Both points are problematic however; having a quantitative target driven approach provides no evidence of a direct link between the success of a Forum Theatre intervention and a reduction in reported incidents of bullying and harassment. There appears to be an assumption that employees in this organisation feel comfortable reporting incidents of bullying when the interviewee later freely admits that they have not been monitoring incidents of bullying and harassment. The Forum Theatre session actually succeeded in highlighting a situation whereby an employee, Adrian, feels uncomfortable about approaching and discussing the situation with his line manager, Fraser. Without proper monitoring in interviewee 2's organisation it will be unclear whether some employees may in fact be in a similar predicament to Adrian. The latter point of engaging directly with employees to determine any positive changes in culture echoes interviewee 5's proposals:

'From our perspective the key thing would be to introduce critical monitoring so one of the things would be to look at the participants that have attended, for example if there was a senior manager group and then to start looking at very carefully the issues that are coming through in their areas of responsibility and try to tie it up with those individual areas. Once the pattern has been established it will my job or my team's job to go out and actually try and get it through with those colleagues to say, 'have you attended that?' and 'how did it go?'...[indecipherable]...and 'these are the issues to be found in your area of work' and 'how did you account for that?', so you make personally people accountable,

otherwise there's no other way round it, but clearly in making people accountable you need to make sure you also support them in skilling up because the last thing you'd want is this fear factor creeping in, 'my God my job's on the line.'

Again, this is rather abstract and highlights the genuine difficulties in determining how the benefits of Forum Theatre can be assessed over the long-term. Employees may be worried or sceptical about how they should approach an evaluation exercise and may be tempted to gloss over any issues that may threaten their own position within the organisation or may embellish positive points in an effort to elevate their status. This is an area that has considerable future research potential requiring sustained field evaluation.

Other challenges involve a lack of commitment from the organisation to take action on the issues raised. Interviewee 3 discusses the danger of an organisation initially recognising a victim's story but failing to provide the necessary support or later denying the story. Insufficient and weak HR policy and support mechanisms may also result in the perpetrators not being sanctioned. Perpetrators, however, may adopt avoidance strategies and deny point-blank any involvement in bullying behaviours, if they believe the purpose of the Forum Theatre sessions is to sanction offenders. Reinforcing positive messages in an atmosphere of truth and reconciliation rather than punishment may be more constructive. Further research may have to be carried out to clarify this point.

There does seem to be a lack of will, clarity and understanding from commissioning organisations on what strategies to adopt to tackle the issues raised. The facilitator discusses how some organisations will not fully reveal how they intend to implement change based on the issues raised during the Forum Theatre sessions and in some instances are unsure on what other interventions – for example, action-learning sets - can be used to continue the momentum generated from the Forum Theatre sessions. This would suggest that many organisations who commission Forum Theatre have no clear initial understanding of its potential scope and how it can be accommodated alongside other interventions. It also suggests that organisations are unwilling to use Forum Theatre to its full potential and are quite happy to use it as an alternative corporate event. The facilitator himself has his doubts on Forum Theatre's efficacy as a long-term intervention:

'I think there is diminishing returns because I think the power of the event itself for people who have never experienced it before is so potent that if they experience it again, even if it's a different scenario, different actors, different subject

matter, it's still diluted in some way because it's not the first time and so there is diminishing returns there, so I think that, you know, it's really important that it's used in a way that to its maximum but it's supported by other interventions'

This rather negative attitude can perhaps be linked to a historical lack of thought, research and clarity on how the success of Forum Theatre can be assessed over the long-term. The facilitator appears confident that Forum Theatre has 'diminishing returns', perhaps because of its excessive melodrama identified by interviewee 5. The issue is that no evidence has been produced to substantiate this claim of diminishing returns. By his own admission their efforts at collating evidence on client results is ongoing, therefore it is surprising that they are prepared to undermine the potential long-term efficacy of their own interventions so quickly. Of course, these are just the views of one Theatre company but having taken a look at other Theatre companies' literature, there is no evidence to suggest that there is a motivation to target clients over the long-term. This perhaps can be linked to the financial costs involved in rolling out Forum Theatre in an organisation, an issue all interviewees are unanimously concerned about. A full day's Forum Theatre training using professional actors can potentially cost up to £4,500, a lot of money especially in difficult economic times. Prohibitive as these costs may be for a number of organisations, interviewee's 1 and 5 have proposed imaginative methods of circumventing these costs. Interviewee 1 has suggested using Arts and Drama students to implement a series of Forum Theatre workshops providing the students with invaluable experience and research data that could be used to nurture their own projects, whilst limiting the financial burden for the host organisation. The drawback could be that the students are not as experienced or skilled as a professional Forum Theatre company but one could argue that it's worth a try. Interviewee 5 has suggested developing their own in-house Theatre group, or training up staff to implement Theatre workshops. The latter point is interesting because it feeds into the Arts Based ethos of developing participant skills and empowering staff to implement Forum Theatre for themselves.

## **Chapter 6**

### **Conclusion: Benefits, Concerns and Constraints**

Witnessing a Forum Theatre session unfold provided a valuable opportunity to assess the practical impact an Arts Based intervention could have in increasing awareness and understanding on sensitive issues under the Equality and Diversity umbrella such as bullying and harassment and gaining insight into what long-term challenges would be faced in a workplace implementation. It is without doubt a very powerful, innovative and visceral tool that seizes one's attention and seeks to identify the issues, complexities and challenges management must face up to when confronted with allegations of bullying and harassment linked to misunderstandings of an employee's behaviour caused by Asperger's Syndrome. The Forum Theatre session allowed for audience members to influence the direction the line manager took in dealing with both the perpetrator and the victim and several strategies and methods were suggested and experimented with. The session also allowed for a practical assessment of the application of an Arts Based theoretical framework by gaining insight into whether the Forum Theatre session was implemented in line with Arts Based criteria of empowerment, learning, collaboration, democracy and emancipation. On these issues, however, one could argue that Forum Theatre was wanting. Of course this was only one example, observed over two sessions therefore one cannot hope to generalise or come to any definitive conclusions. Nevertheless Forum Theatre as implemented using professional actors does not fully harness Arts Based principles. One understands that transferring a Boalian style of Forum Theatre to a Western organisation may be somewhat inappropriate in view of the contrasting political and philosophical contexts, however from what was observed there is a real danger of the Forum Theatre model being appropriated by Management as a technology for influencing and improving what Clark and Mangham (2004a) described as lower-level issues such as communication.

Forum Theatre as observed may have ambitions to institute sustained and fundamental change in areas such as bullying and harassment. However, there is no evidence, from the sessions themselves and from the in-depth semi-structured interviews that took place with three participants and the

Forum Theatre company's facilitator and the questionnaire sent to another participant, of any clear understanding of how this can be achieved. What is clear is that seeking to seriously address and challenge issues of bullying and harassment requires a sound knowledge of an organisation's power dynamics and culture. The Forum Theatre model presented seems ill-equipped to offer any realistic and incisive insight into how it can achieve this.

There was a distinct lack of will, insight and determination by the Theatre company to address the issue of Forum Theatre's potential as a successful long-term intervention. By their own admission they spoke of its 'diminishing returns'. As discussed previously, there is no evidence to support this statement. What conclusions one can draw from this is that the Theatre company are seeking to mask a strategy in which they are quite happy to implement one-off Theatre sessions, collect the money and move on, with little consideration to the moral and ethical concerns related to unearthing a hornet's nest of issues as a result of a Forum Theatre workshop in an organisation. There was reference to guidance being offered to the commissioning organisation on what strategies could be used to deal with and tackle the issues raised from the Theatre session constructively. However, the facilitator was rather clear in his view that commissioning organisations were responsible for coping with the aftermath themselves and moving forward of their own volition. This, despite the participant interviewees not being altogether clear and confident on Forum Theatre's potential scope for change and their unanimity in their view that a one-off Theatre session would be insufficient to seriously tackle underlying issues of bullying and harassment. Of course, this short-term perspective and possible disregard of Equality and Diversity professionals misgivings is the view of one Theatre company and one must be careful not to generalise and draw any negative conclusions about how Forum Theatre as a whole is being implemented. Nevertheless it is worrying if other Forum Theatre companies are adopting the same approach. Further research is needed to clarify this area.

Assessing the impact of Forum Theatre is also unclear. There appears to be no available evidence of any genuine attempt to compare the costs and the benefits of a Forum Theatre intervention. Observing the session offered no insight into how its long-term success can be effectively gauged. The participant interviewees to their credit made some effort to formulate methods and strategies within existing policy frameworks in an effort to consider how Forum Theatre's long term benefits could be directly linked to a genuine reduction in bullying and harassment. However, they failed to crystallise how exactly this could be done. Again, there is scope for further research here.

This research has its obvious drawbacks. Only one Forum Theatre session was observed over two sessions; three Equality and Diversity professionals were interviewed, another answered an open-ended questionnaire based upon the semi-structured interview guidelines and the Forum Theatre company's facilitator was interviewed. Drawing conclusions is therefore difficult on such a small sample of respondents. Nevertheless this research has mapped out some very important issues relating to Forum Theatre based upon one of Scotlands most successful Forum Theatre companies' implementation strategies. Also, the interviews have provided a foundation on how Forum Theatre can be developed to explore workplace Equality and Diversity issues with bullying and harassment being used as an emotive example. Much of the research heretofore has failed to fully analyse and consider how Forum Theatre can be designed, implemented and assessed as a long-term catalyst for change within an organisation. Nothing so far has made an attempt to consider how Forum Theatre can help to deal with such important topics as bullying and harassment. One would hope that this research has opened the door to a long and fruitful path. Possible future research strategies could involve a systematic longitudinal evaluative of large scale interventions in commercial and non-profit organisations in collaboration with organisations such as Arts and Business and voluntary organisations such as MIND and the Samaritans. Results and insights could be channeled into applied research based on the Tavistock Institute's action research agenda, adhering to principles similar to an Arts Based ethos – direct participation, natural workgroup innovation and reciprocal management arrangements. This, one would hope, will inform conclusions about viable means of harnessing artistic principles and practices and assessing how Forum Theatre can be applied in conjunction with other Arts Based Techniques to enhance management and intervention not only in areas involving Equality and Diversity such as bullying and harassment but across a broader spectrum of Business Management and Social Science.

## **Chapter 7**

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## **Appendix I**

### **Semi-Structured Interview guidelines – Audience participants**

- What were your impressions of the Theatre sessions?
- Do you think they were successful? Why?
- Do you think that it is an effective method at changing attitudes and behaviours?
- How do you think they could be improved?
- Is it worthwhile having a one-off theatre session? How do you think Forum Theatre could be implemented over the long-term?
- (If we can perhaps move on to the subject of bullying...how would you define bullying?)
- Have you experienced or witnesses bullying behaviours? Can you describe them?
- What were the consequences?
- Do you think that Forum Theatre could be helpful in identifying and tackling issues of bullying? Why?
- Do you have any ideas on how it could be used to do this?
- What challenges might there be within your organisation, if Forum Theatre were used to highlight issues of bullying?

## **Appendix II**

### **Interview 1 Transcript**

#### **1. What were your impressions of the Theatre Workshop?**

I viewed the theatre workshop once before a few years back and I think it's a very effective means of getting across particular messages on sensitive issues such as bullying and harassment. It's a very....people have to think straight away..it's not something written...it's not theory...you've got to think about what's happening. The approach is very effective.

#### **2. Do you think the Workshop was a success?**

I think the session was a success in that it was just trying to demonstrate to practitioners how Forum Theatre could be used. I think when they were doing the topic they were indicating that it was about harassment as well as disability. In my view I didn't think the disability issue got the prominence they maybe thought it did. But I think it's demonstrating the technique as being effective.

**3. Would you say that the workshop focused more on the process rather than the subject matter?**

Yes, it did

**4. Do you think that Forum Theatre would be effective in changing workplace attitudes and behaviours?**

I think it's an effective method of awareness raising and making managers and employees actually think a bit more about the issue and how they respond to things..I think so...I think that works...and it gives people the opportunity to participate rather than just be a silent viewer.

**5. Do you think it would be worthwhile having a one-off theatre session?**

I think that the main issue for an employer is, obviously it's quite a costly intervention and you would need to think how you would incorporate it. Basically, it would be unlikely to be able to afford to run that type of session across an entire organisation...they did indicate that between 20 and 25 would be the maximum in an audience to get the participation. So, I think it could only be as part of a range of interventions.

**6. How would a Human Resources Department try to measure the success of a Theatre session?**

Probably quite difficult to measure. I think the only way to measure would be to ask the participants what they learned from the process and ask them to identify specifics and also ask them to identify what they would now do next to follow that up. I think that's often an issue with training and people attend a training event and whatever, but...follow up...to say, 'what would we do next?' and then to follow it through to see whether it has made a difference. That could be the only way to really measure how useful it was.

**7. Would there be a problem perhaps in coming to any conclusions based on a theatre session? For example, if you have a number of employees who have completely different views on the session.**

You're meaning that 'different views' in the way of whether they found it useful or about the content?

**8. For example, yourself as an Equality and Diversity Director were wanting to use Theatre for a specific purpose and you asked the employees to gauge their opinion on what they think of it and the response is inconsistent...some employees think it's successful for different reasons, others think it unsuccessful for different reasons...What would you do with this information? Would it be possible to say that we have something positive to look forward with?**

I think it...you would then be focusing on what was the topic about and what you were trying to get across. Now, you'll probably find that obviously people have different views on what they think harassment and bullying is and then you would use that to identify how it is that people have different views and to try and get the message across that it's about the effect of the behaviour on the person not necessarily that your view could actually be not correct and you might think it was harassment but in terms of the law it could well be. I think you would use it in that context. I think what's useful in Theatre, I think if you get a debate like that, that is useful because sometimes people maybe won't say...you need to make sure that it's a Forum where people can put forward their views...it's kind of contained within that, and then you would also be able to gauge, let's say, a larger proportion of your people attending were saying, 'well, this is not', you then realise that you have quite a bit of further work to do. So, it would give you *that* out of it.

**9. How do you think the Forum Theatre session we saw could have been improved upon?**

(long silence)...that's probably quite difficult. They obviously had time constraints in how long the session was and obviously they couldn't get through the whole session, therefore there were maybe outcomes that would have been helpful to the participants...I think that's kind of important...when

they were doing it you have to get through the whole scenario that you want to get through and you need to manage the interventions that people are making and, again too, there's always when you have an audience there are some people that are more likely to speak than others and somebody should be making sure that there are equal opportunities for everyone to speak...not just the first person who always speaks.

**10. Do you think that using professional actors rather than the employees themselves is a better method?**

The problem with employees' direct participation...I mean, you could do it, but you would have to identify employees who were willing to do it and in training when you mention role-play people immediately disappear, don't want involved, particularly if it's a topic they don't know a lot about. You would have to train up people to do it because there are quite a number of skills in doing it. Now, whether that would be an effective use of resources...from our point of view if you had other people, for example students that were studying Arts and Drama, there might be the potential for a project that they could use as a work project and an employer could use and that might be something worth considering particularly with the cost implications.

**11. How would you define 'bullying'?**

There is the standard definition...bullying is intimidations, it's offensive behaviour to an individual and it can be in a variety of forms, it can be overt, also it can be very subtle because it can be about excluding people, not giving them information, it has a whole range of different contexts. But

largely again it's about the effect on the individual.

**12. Have you experienced or witnessed any bullying behaviours?**

Yes, unfortunately because I've worked for many years. Every organisation is likely to have that kind of behaviour and I think the main challenge is actually creating a culture where people have the confidence that they can bring forward complaints because it's probably the most difficult area for somebody to make a complaint about.

**13. Could you describe a particular incident?**

(long pause)...I could probably describe incidents whereby a manager has come into an office where there is two or three employees and something has gone wrong in some piece of work and the manager immediately talks in an aggressive manner to the employee involved in front of other employees and that...I mean...that is immediately inappropriate behaviour and it's not how to deal with a situation where something's gone wrong. Now that's a kind of very straightforward example but there are other examples of maybe someone trying to undermine someone else by taking credit for the work. I've probably seen quite a wide range of situations.

**14. What were the short and long term consequences of those behaviours?**

In the short term it obviously causes upset to the employee concerned. It could likely lead to a range of things, they would be demotivated, they could go off ill, they can get quite stressed out by the situation, it might just be part of a number of other actions that have happened. In the first example, it affected the other employees in the office. Now they're then in a situation, do *they* stand up and say we also felt that was inappropriate? They will be concerned about what may happen, the long-term effects, there may not be direct repercussions, but it affects on their future work, their career depending on who manages them.

**15. Do you think Forum Theatre could be helpful in identifying and tackling issues of bullying?**

I think it's helpful in identifying actually 'what is' bullying behaviour and also identifying the fact of the effect on the individual because I think that's sometimes the most difficult part, if people think 'well, my behaviour was alright, why should X have felt like that', and I think it's getting *that* through. I think the other part was how they did the scenario, it was how that as a manager who's receiving a complaint, they actually need a range of skills to manage that and in some areas of academic life people have not come in to be managers and therefore there a range of skills that not everybody naturally has and these are maybe skills that have to be acquired and have to be learned.

**16. How do you think Forum Theatre could be used in your own organisation?**

It's a follow up I've been thinking about. To me the possibility is when – which we will be relaunching our 'Dignity and Respect' policy and it could be part of a relaunch. Now, perhaps at a fairly senior level it could be used. I don't anticipate we would have funds to use it very widely but in any scenario where you are trying to create a positive culture, in my view you need to start at the top of the organisation, because you're looking for the behaviours, the positive behaviours to demonstrate it. Therefore...people can be aware of issues but sometimes you read something and I think it's quite sharp-hitting and that just reminds people or it makes them think about what their position is and what role they've got in changing a culture.

**17. What challenges might there be in implementing Forum Theatre in your own organisation?**

The challenges are, I think, their use is limited because of the cost. I think as a form of some kind of training intervention I think it would be welcome because sometimes the difficulty with training is it's difficult to vary it and obviously there's a lot of concentration on let's say people doing self-learning...a lot of learning by yourself on-line..and therefore I think it's another dimension when you're part of a group and you're hearing views of others, which is always the downside when you're trying to do remote training – but, which there is a role for that because obviously there is a continual need for, there's so many dimensions of training needed - but I would probably see it as maybe, you would be running maybe two or three sessions but you never know what that might

engender in an organisation, how more widespread you could use something.

**18. Is there anything else you would like to add?**

I just think with that kind of training it can be used in a wide variety of scenarios and I think it could be used quite strongly in management training and that might be somewhere where you could have smaller groups, a more manageable situation from the cost point of view.

## **Appendix III**

### **Interview 1 – Coding Analysis**

#### **Question 1:**

##### **Initial impressions of Forum Theatre**

###### **Critical enthusiasm.**

- Effective communication on sensitive issues.
  - Encourages quick thinking
- 

#### **Question 2:**

##### **Success of the Forum Theatre session**

###### **Critical enthusiasm.**

- Practical
- Effective process

###### **Critical unenthusiam**

6. Content – lack of attention to disability issues
- 

#### **Question 3:**

##### **Forum Theatre process versus subject matter**

###### **Critically neutral**

7. 'Process' appeared to be more prominent and important
- 

#### **Question 4:**

##### **Forum Theatre's potential to change attitudes and behaviours**

###### **Critical enthusiasm**

- Encourages self-reflection
  - Encourages interaction and participation rather than passivity
-

**Question 5:**

**Advantages and disadvantages of commissioning one organisational Forum Theatre session**

Critical unenthusiasm

- Cost restrictions
- Complex and potentially unwieldy
- Organisational roll-out impracticable and expensive
- Incapable of broad organisational change

Critically enthusiasm

- Can be included within a broader package of interventions
- 

**Question 6:**

**Measuring the success of a Forum Theatre intervention**

Critical enthusiasm

- Iterative dialogical learning process
  - Employees to identify and reflect on specific issues raised
  - Employees empowered to consider tackling and resolving those issues
  - Interviewee doesn't specify how in practical terms this will be done
- 

**Questions 7 and 8:**

**What to do with a diverse range of employee views and opinions – the 'pluri-vocal' effect – generated during a Forum Theatre intervention**

Critical enthusiasm

- Allows an organisation to determine the existence of a diverse range of views on a topic
  - Generates debate
  - Allows an organisation to unearth and address misconceptions
-

### **Question 9:**

#### **Suggestions for improvement**

- Time constraints
- Potential outcomes not addressed
- Unequal balance of audience interaction
- Facilitation could have been more egalitarian

### **Question 10:**

#### **Using employees to create their own theatre rather than using professional actors**

##### Critical unenthusiasm

- Many employees not wishing to take part
- Further training needed to educate employees on the subject matter - costly
- Training in Forum Theatre techniques needed also - costly

##### Critical enthusiasm

- Drama students could be used to implement Forum Theatre sessions around the organisation
  - Reduce costs and allow students to use the Forum Theatre sessions as a work project towards their degree – a win/win scenario
- 

### **Question 11:**

#### **Definition of bullying**

- Diverse definitions and contexts
  - Both overt and subtle
  - Intimidation
  - Exclusion
  - Perception
- 

### **Question 12:**

#### **Bullying experience**

- Every organisation likely to experience bullying behaviour
  - Main challenge is to create a culture where victims feel confident about making complaints
-

**Question 13:**

**Bullying example**

- A manager's public aggressive manner
  - Someone taking credit for another person's work
- 

**Question 14:**

**Bullying behaviour consequences**

- Victim's demotivation
  - Illness
  - Stress
  - Affects others, not just the victim
  - Fear of future repercussions if perpetrator challenged
- 

**Question 15:**

**Forum Theatre's potential in identifying and tackling issues of bullying:**

Critical enthusiasm

- Bullying behaviours can be identified
  - Identifying the effects on the victim
  - Raising awareness of perpetrators' behaviour to themselves
  - Identifying management skills needed to effectively communicate one-to-one with victims
  - Debating how complaints can be better handled
  - Improve employees and managements' 'soft' skills
- 

**Question 16:**

**Contextual application of Forum Theatre in interviewee's organisation**

- Possibility of being included in a new 'dignity and respect' policy
  - Cost constraints – organisational roll-out not possible
  - More likely to be applied at a senior management level
  - Generating a positive culture starts at the top of the hierarchy
-

**Question 17:**

**Forum Theatre implementation challenges**

- Financial cost
- Forum Theatre can add another dimension, nevertheless
- Get's people together rather than using on-line learning
- Has significant potential

## **Appendix IV**

### **Interview transcript 2**

#### **1. What were your impressions of the theatre session?**

I thought it was really well done, very professionally delivered. My overall feeling at the end of it was that it was a very effective way of communicating the message that they wanted to communicate.

#### **2. In what way(s) was the session effective?**

I think just because it takes the old case study scenario type thing that you do on training that step further. It just makes it much more interactive and realistic and because depending on what people in the audience advise or say the scenario changes a little bit and so it makes it much more lifelike.

#### **3. Do you think there were any limitations with having an interactive element?**

I suppose it's limited by the experience of the group to some extent. I don't know how much input the actual facilitator would have, if the group say weren't kind of articulate or as...if they weren't going down the right path in terms of the training element of it or what was expected to, kind of, come out of it in terms of the objective. I suppose the facilitator would maybe be a wee bit more directive but...so I suppose that would be a limitation, its really limited by the group.

**4. Would you say that the session was successful?**

I thought it was very successful. I thought it was a really good way to explore the issues and get everybody to put some input in, at the same time seeing what that input does in terms of the actions and reactions of the characters.

**5. Do you think that Forum Theatre is an effective method at changing attitudes and behaviours?**

I think it could be very effective because I just think that it was much more realistic, because it seemed more like a real situation where the usual thing is get things like case studies and have a look at them or look at various scenarios and discuss them in a group and then come back with feedback. I think the fact that you could stop the action and see and advise on certain things and see what impact that had was a very effective way of developing the issues and thinking about them further.

**6. Do you think negative attitudes and behaviours can be changed by using just one theatre session? Do you think that an organisation would have to implement several over a long period of time?**

I don't know whether they would all have to be theatre sessions, but I can see that particular method being useful in terms of exploring the issues and finding out where you're at or how you would

react to certain issues or what your values are possibly as well but something like that, I think that probably needs longer term change and it needs all the back up of management and leadership and all the rest of it. I think just to do any training on a sort of one-off basis probably, without follow-up, probably isn't that effective. I think you need to kind of follow it up with a whole package of kind of support and interventions to look at those particular issues because I think bullying is a very...it's about values and it's about a culture and, you know, that doesn't change very quickly.

**7. So theatre would have to be included within a broader programme of interventions?**

Definitely, yes.

**8. How do you think the theatre session could have been improved upon?**

I wouldn't have improved it all. I thought it was really, really well done. I thought the facilitator was really professional, really knew the subject very well and managed the audience very well too. I'm not sure how it would work at different levels because I think that was one of the questions I asked, *that* particular subject with *that* audience meant you had quite a lot of practitioners who did have a lot of knowledge. So, whether or not if it was something that people were a bit unaware of and how they would get to the conclusion that we'd got to, I don't know...there would maybe be a bit more input from the facilitator. But I certainly felt very confident that he, in particular, would have been able to do that because he said that he had a lot of management background, not just in Equality and Diversity but it sounded like he had a lot of expertise and knowledge.

**9. Would it seem they had done quite a lot of research beforehand?**

They certainly sounded very knowledgeable in the subject.

**10. Do you think using professional actors to represent real employees would introduce a sense of artificiality to the process? One could argue that the actors are distorting reality, do you think this would be a problem?**

It possibly could be and again that was one of the questions I asked the actors was, 'had they had training in Equality and Diversity' so that, how did they know how to respond to the questions the audience were putting and I suppose I just, again, got this feeling that they had had quite a lot of experience and so reacted quite well. I don't think any old actor could do it. I don't think the skill was in the acting, although that was quite good, their skill was also in...they seemed to have a bit of, I hasten to say, knowledge or expertise, but experience of responding to the audience.

**11. In terms of authenticity, would you say that it would perhaps be better if employees actually created their own theatre without using professional actors?**

I think that goes back to a sort of just getting people to do role-play then and I think then you do get peoples' own agendas and their own experiences coming in, whereas I think if it is actors they are a bit more dispassionate in that sense, they're not really involved in the actual circumstances, so...

**12. So, more objective?**

They're impartial.

**13. How would you define bullying?**

Any conduct that the individual thinks is unacceptable or upsetting or...

**14. Have you experienced or witnessed any bullying behaviours?**

Not in this workplace but I have in the past, yeah.

**15. Could you describe it?**

It was basically a senior manager who had that kind of authoritative, kind of authoritarian approach and who was a bully really.

**16. Can you give me an example of any particular kind of conduct that he did that could perhaps be construed as being bullying?**

It's quite difficult..I mean I think he wouldn't really always take peoples' views, maybe he was just a bad manager, but he wouldn't take people's views on board, he physically had quite a big presence and, you know, when you went to speak to him he would fill the room and do quite a lot of very physical gestures, which were intimidating. He did sometimes raise his voice. It's maybe that he

was more...it's just his general manner and demeanour was aggressive but it was consistent...maybe it was verging on bullying. I wouldn't have said he made it personal to you as an individual in that sense but it was very much how he approached everybody.

**17. What were the consequences of his behaviour?**

A lot of people left the organisation.

**18. Do you think that Forum Theatre could be helpful in identifying and tackling, for example this manager's behaviour? Would he be willing to be involved in a Forum Theatre session?**

To speak for him as an individual, he probably would if gone on a session like that and may have taken some things from it, but again I really feel strongly that on its own it wouldn't really be enough, I think it would have to be followed up by a kind of, the whole top level commitment to a change in culture and ongoing sort of support systems and maybe changing management or however things work in an organisation.

**19. Taking a broader view, do you think Forum Theatre could be helpful in identifying and tackling issues of bullying?**

I do, yeah, I think it was very effective in terms of bringing out the real feelings...the effect of the consequences of bullying behaviour. I think that was well done. Also I think it probably highlighted better than any other way behaviour that's bullying, which people don't really normally or might not themselves feel is a bullying, kind of, culture or approach because the girl in particular who was doing the bullying probably would be pretty shocked, if someone said to her, 'Did you realise that's

what that was?', so I think it was a good way of bringing out the two sides, the effect in terms of the individual but also for the person who was the perpetrator as it were, it was an effective way of looking at that, the language she used and showing and demonstrating that it was bullying.

**It's interesting that the actor is 'recording' this person's behaviour and then 'playing' it in front of an audience, if you like. When I was watching 'The Apprentice', some of the participants were probably guilty of some bullying behaviours...**

Yeah, yeah

**and the follow-up programme called 'You're Fired!' actually show the fired participant what they had been doing and they looked quite surprised, almost shocked that they behaved like this. In a way Forum Theatre is a way of doing something similar, without obviously the television cameras. But I think it's good, like you're saying, at just demonstrating to people this is how you behave. Perhaps the only difference is that with TV it's more accurate because it is *that* person being recorded....**

...it's real life....

**20. In terms of your own organisation, how would you think about using and designing a Forum Theatre programme?**

I'm not very sure actually...I mean...my main role is in Equality and Diversity and that's the type of

training that then I would get involved in. We do obviously cover bullying, intimidation on behalf of various mechanisms within the college to, kind of, try and at least monitor that and also deal with it so...I think that's quite a hard question, I think, with going into all the detail with thinking about what it would be but I suppose demonstrating practical examples of types of behaviour and types of incidences that would be perceived to be bullying by the recipient. For me it would be across the spectrum of the equalities, so it would be people with disabilities, ethnic minority groups, women, say...so I would be picking out specific examples of the type of language and behaviour that a lot of people think is acceptable but actually for someone on the receiving end is not and I think, in terms of the culture of the organisation then it would, again just to reiterate it would need to be part of a wider package of intervention, you know it would be Forum Theatre that would have to be followed up them.

**21. Would you use a cross-section of staff and students?**

I mean, again, that's quite a difficult question because obviously our role is to work with both staff and students. We would probably do it separately and it would probably be management...(laughs)...first and then..I'm a great believer in going through the whole organisation so it shouldn't just be at the top.

**22. What challenges might there be in implementing a Forum Theatre programme withing your organisation?**

I suppose the commitment generally and I didn't look at costs but I can imagine it would be quite costly because of the personnel involved in that sense, apart from everything else, so that might be prohibitive and I think it's difficult to cascade it or

replicate it because it's so unique, it is dependent on the actors, so I think hard financial decisions would have to be made in the sense of then who is the appropriate person to get that aspect of the training and then how do you try and get the message out there to the rest of the staff, so I think that would be one of the issues.

**23. Would you say that theatre sessions are deeply contextualised? In each session, there are people with different personalities amongst other things, would there be difficulties in drawing conclusions and to generalise when comparing the sessions?**

You mean in terms of finding out whether or not there was a bullying culture?

**24. Say, for example, in your position if you had to produce a report to your manager about these theatre sessions, he or she might ask whether they have been successful...**

what was the outcome...

**25...how can we measure success...Would that cause a problem do you think?**

I suppose, well the measure of success would be a reduction in incidences of...and we are supposed to be trying to monitor incidences...not actually doing that at the moment (laughs)...we should be and we will be...so, I think you could have an effective measure but it would take time. I suppose I just feel that, really, for anything like that it would have to be a longer-term thing, it's not a quick fix, really. You can only measure as well by the feedback in terms of people who attended but also you could do some follow-up survey of staff in general to see whether or not they felt

the culture had changed, you know that kind of thing...an experiential type thing...

**26. that would be quite a challenge...**

well, that's what I'm saying, I think for something like bullying in particular, which you've got to identify is there an issue in the organisation and, if there is it's a much bigger package in terms of dealing with it rather than just having a theatre session.

**27. People might perceive bullying to be different and they'll define it in different ways based upon their own experience....**

well very much, I think so

**28. And just finally would you foresee any resistance to the theatre sessions?**

As a mechanism, I think some people will find it uncomfortable

## **Appendix V**

### **Interview 2 - coding analysis**

#### **Question 1:**

##### **Initial impressions of Forum Theatre**

###### **Critical enthusiasm**

- Effective communication on sensitive issues
- Interactive and realistic
- Innovative – pushes boundaries

###### **Critical unenthusiasm**

- Success contingent on experience levels of participants
  - Success also contingent on participants' knowledge, ability and articulacy
  - Facilitator may have to direct a less capable group more, perhaps defeating the purpose
- 

#### **Questions 2 – 4:**

##### **Success of the Forum Theatre session**

###### **Critical enthusiasm**

7. Effective at analysing and exploring the issues
  8. Participative
  9. Improvising
- 

#### **Question 5:**

##### **Forum Theatre's potential to change attitudes and behaviours**

###### **Critical enthusiasm**

8. Encourages self-reflection
  9. Encourages interaction and participation rather than passivity
  10. Explores different avenues suggested by audience
  11. Allows for the audience to reflect on the outcomes of these suggestions
-

**Questions 6 and 7:**

**Advantages and disadvantages of commissioning one organisational Forum Theatre session**

Critical unenthusiasm

- Reforming attitudes and behaviours requires longer term change
- One-off training, without follow-up is ineffective
- A one-off Forum Theatre session needs to be followed up with a full package of support
- Attitudes and behaviours linked to organisational culture that can be difficult to change

Critically neutral

- Included within a broader package of interventions
- 

**Questions 8 and 9:**

**Suggestions for improvement**

Critical unenthusiasm

- Success is contingent on group ability, knowledge and experience
  - Also need to avoid preaching to the converted
- 

**Questions 10-12:**

**Using employees to create their own theatre rather than using professional actors**

Critical enthusiasm

- Actors can potentially distort employee's experience. Actors' experience and knowledge levels are very important

Critical unenthusiasm

- Actors offer a more objective perspective
  - Employees would bring their own subjective agendas to the session.
- 

**Question 13:**

**Definition of bullying**

- Behaviour the victim perceives as being unacceptable
-

## Questions 14-16:

### Bullying example

- A previous manager with a consistently authoritarian, physical manner
- 

## Question 17:

### Bullying behaviour consequences

- Significant staff turnover
- 

## Questions 18 and 19:

### Forum Theatre's potential in identifying and tackling issues of bullying:

#### Critical enthusiasm

- Bullying behaviours can be identified
- Identifying the effects on the victim
- Raising awareness of perpetrators' behaviour to themselves
- Identifying management skills needed to effectively communicate one-to-one with victims

#### Critical unenthusiasm

- Forum Theatre on its own insufficient
  - Needs to be part of a broader top-level commitment to changing culture, replacing existing managers and reforming support systems
- 

## Questions 20 and 21:

### Contextual application of Forum Theatre in interviewee's organisation

- Interviewee not confident at providing detail
- Would design Theatre sessions to develop empathy between participants, to develop understanding that behaviours are perceived differently by people.
- Forum Theatre would need to be part of a broader package of interventions that would need to be followed up
- Would begin with management but believes Forum Theatre should be rolled out across the

whole organisation

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**Question 22:**

**Forum Theatre implementation challenges**

- Cost constraints – organisational roll-out probably not feasible
  - Difficult decisions to be made as to who is the most appropriate employee to become involved in the Forum Theatre sessions
  - Employees will feel uncomfortable with the Forum Theatre process (**see final question**)
  - Promoting and selling the concept to employees will be difficult
- 

**Questions 23-28:**

**Measuring the success of a Forum Theatre intervention**

- Quantitative reduction in incidences of bullying reported
- Survey employees who attended, in particular asking them for their views on any perceived change in organisational culture
- Again, Forum Theatre would have to be included within a broader package of interventions in an effort to implement substantial, tangible change

## **Appendix VI**

### **Interview 3 transcription**

#### **1. What were your impressions of the Theatre sessions?**

It was extremely professional and it 'got going' very quickly. It was very engaging.

#### **2. Do you think they were successful? Why?**

Yes very successful, because it was powerful, both in terms of the actors and the story, and also I understood how it worked very quickly

#### **3. Do you think that it is an effective method at changing attitudes and behaviors?**

**Why?**

I think at this venue you were preaching to the converted. I also think the aspergers issue would be a step too far for a lot of middle managers. However I do think with the right topic, i.e. something that people can easily identify with this would work very well.

#### **4. How do you think the theatre process could be improved upon?**

In this case a longer period of time.

### **5. How would you define bullying?**

It's tricky to define. An individual knows when they feel bullied. It's often covert rather than overt. It can be anything from excessive micro-management to being left out. It can be being overloaded/set up to fail. It can be about being intimidated. It usually more than one incident and its cumulative. It usually makes the person being bullied ill, with long term adverse effects

### **6. Have you experienced or witnessed bullying behaviors? Can you describe them?**

Yes, I have experienced being bullied myself. I have also being a witness to bullying.its usually when a manager makes unreasonable demands

### **7. What were the consequences of these behaviors?**

In one case the person went to tribunal and won, in other cases it resulted in the individual leaving their job. It always results in a lowering of morale and productivity. The impact of bullying on the individual can be massive and can take many years to recover from.

### **8. Do you think that Forum Theatre could be helpful in identifying and tackling issues of bullying? Why?**

Yes, it could help people to understand the impact of bullying it could help orgs/companies to develop actions plans and support structures to challenge eradicate bullying. It could also assist

individuals to depersonalize their own experiences of being bullied. It could perhaps challenge the bully?

**9. Do you have any ideas on how it could be used to do this?**

The use of carefully crafted and researched case studies to look at scenarios where bullying occurs, they need to be scenarios that people can relate to and they need to be clear that almost anyone can be bullied. They need to empower the victims. As a note of caution there should be a helpline or point of confidential contact that an audience member can contact to discuss.

**10. What challenges might there be within your organization (or others), if Forum Theatre were used to highlight issues of bullying?**

Key challenges would include not *wanting* to believe the victim. Not believing the victim, not offering support. Not sanctioning the offender. Not training all staff to deal with the issue. There would also be a danger that the org might be passive and therefore complicit.

## **Appendix VII**

### **Interview 3 – Coding Analysis**

#### **Question 1:**

##### **Initial impressions of Forum Theatre**

###### **Critical enthusiasm**

- Professional
  - Engaging
- 

#### **Question 2:**

##### **Success of the Forum Theatre session**

###### **Critical enthusiasm**

- Visceral
  - Accessible – easy to understand
- 

#### **Question 3:**

##### **Forum Theatre's potential to change attitudes and behaviours**

###### **Critical enthusiasm**

10. Synergy between topic and audience important

###### **Critical unenthusiasm**

12. Aspergers Syndrome example inappropriate for managers to fully understand from a Forum Theatre session – limitations on Forum Theatre's potential to explicate on complex issues
  13. Experienced and knowledgeable audience may feel that no new issues have been raised
- 

#### **Question 4:**

##### **Suggestions for improvement**

- More time needed
- 

#### **Question 5:**

##### **Definition of bullying**

- Management style

- Exclusion
- Intimidation
- Consistent and patterned

**Question 6:**

**Bullying example**

- Manager making unreasonable demands
- 

**Question 7:**

**Bullying behaviour consequences**

- Tribunal – legal process
  - Low morale and productivity
  - Serious personal impact on the victim
- 

**Question 8:**

**Forum Theatre's potential in identifying and tackling issues of bullying:**

- Identifying the effects on the victim
  - Help develop action plans
  - Help develop support structures
  - Help depersonalise victims' experiences
  - Confront the bully/ies directly
- 

**Question 9:**

**Contextual application of Forum Theatre**

- Align Forum Theatre with case studies highlighting bullying scenarios
  - Organisation must consider using a confidential helpline or confidant as an outlet for participants to discuss issues raised further
- 

**Question 10:**

**Forum Theatre implementation challenges**

- Denial of bullying victims' story
- No support mechanism
- Perpetrators not sanctioned

- No prior staff training in the area of bullying and harassment
- Organisation not committed to change – Forum Theatre a cosmetic and transient exercise

## **Appendix VIII**

### **Semi-structured Interview schedule – Director and Facilitator Forum Theatre Company**

- In your own words, how would you describe Forum Theatre?
- How can Forum Theatre be successful in dealing with long-term issues of Equality and Diversity within an organisation? Is the process more important than the outcome?
- How would you and your clients measure positive change within their organization as a result of a FT session?
- What research do you carry out within an organisation prior to a theatre session?
- By using professional actors to represent employees, are you not distorting reality by relying on actors' improvisation to audience questions? How accurate are actors' improvised responses to what the actual employee would do? Would it not be more empowering for employees, if they were to act out their own stories?
- Is there a danger that the visceral quality of Forum Theatre can distort reality?
- How would you respond to the accusation that Forum Theatre can raise false hope of change among spectators/employees when meaningful change is perhaps beyond their reach? (due to power structure, company politics)
- “Theatre of the Oppressor” is what corporate-controlled Forum Theatre has been described as. Are your FT projects (subject matter, script, roles) directed by Management or do you have a relatively free hand? Who ultimately has control? Have management become the new 'ruling class' seeking to appropriate and exploit it for their own ends?
- If management are not seeking to relinquish control, can change/transformation be possible?
- Without intimidation (Boal) and confronting the audience with hidden conflicts, subconscious behavioural patterns, or painful truth (Schreyogg), can Forum Theatre really institute change?

## **Appendix IX**

### **Interview 4 – Transcript**

#### **1. How would you describe Forum Theatre?**

You mean Forum Theatre how we do it or Forum Theatre in general..?

**..let's compare both...**

I would say that Forum Theatre that probably people understand more about, those who come in contact with it, is more a sort of the Augusto Boal, who coined the term Forum Theatre which basically comes from a very clear...dealing with oppressive situations and it's developed as a sort of response to that. The aspect of it which is about empowering a protagonist to take action in order to move things forward for that person, in other words to challenge the oppression is a key element to it but the other key element of course is the fact that it's orientated towards action. It's not a passive process, the 'spec-actors' as Boal calls them are the audience in a traditional theatre term actually take part and direct the action through the protagonist so from that point of view it also has a revolutionary, Marxist revolutionary background as well because it is about taking action. Our...the way we approach Forum Theatre is first of all that we are...the active part of it is very similar to Boal in that it is orientated towards action. We deal with situations within organisations and we're brought into organisations in order to deal with 'people' agendas, so 'what's happening' as far as learning and development is concerned, so I suppose the starting point for us is where the organisation are, what's the issue or the problem they want to address and as far as Forum Theatre is

concerned then that's only one of the interventions that we would use..there's a whole number of learning and development interventions that we use. Forum Theatre, I suppose, is our core area and because of the interactive and the element of it which engages people is often the element that people will want, that *organisations* will want...because it engages and involves. We will start by asking what an organisation has in terms of issues or problems...where do they want to move to...what are the nature of these problems...we will devise a forum model, a scenario that actually reflects that and then the participants, as we call them rather than 'spec-actors', will then engage with that. Working on a similar basis, which is the structure of the forum model, which in a way sets up the problem, if you like, and the issues culturally as well as personally and between the characters but also the characters are defined as protagonist and antagonist or *antagonists*, sometimes we will have more than just one in that situation. Often the protagonist character is in a situation where they have some sort of responsibility or accountability to influence, so...I suppose a lot of the work that we do is about influencing and influencing within a particular organisational structure. The work that we do does, can address organisational change but the sort of change that's happening is not revolutionary change because we're working within a workplace context, it's more organisational change which is often driven from the top, rather than from the bottom. But organisations often will find when they're engaged in organisational change there's only so much can be driven from the top unless you get commitment from people who are actually doing the jobs, nothing's going to happen and it won't work. So the work that we do, which is really about engaging people and actually saying 'what's in it for them?' in terms of those changes and what we try and do in actually quite a complex way is to try and look at all the issues that surround these sorts of changes that take place within organisations for people, 'what's the impact on people?' One of the key things about Forum Theatre, whether it's in a traditional model or the model that we use, it's actually about being able within a fairly secure environment to be able to see the costs and the benefits of particular courses of action, so when the participants suggest a course of action for the

protagonist and then that course of action is played out for them, they can then see what the obvious fall-out from that course of action can be in terms of costs and benefits. The process allows you to play around with that so if something goes horribly wrong it doesn't actually achieve the outcome that the participants are looking for then they can have another go at a different strategy and that's the strength of the process...it's that ability to be able to see something happening and then make the judgement whether or not that is appropriate or not. That doesn't necessarily mean that the whole group will always agree on what a), what the strategy should be and b), what the outcomes were, so there's always a big element of debate and discussion as you'll be aware from the sessions you witnessed.

## **2. There's a tension...it's perhaps about managing that tension..?**

Absolutely, absolutely and particularly...that's why we facilitate the process rather than use the more traditional Forum Theatre figure, which is 'the Joker' figure and the Joker figure is there really to present...to question and challenge...to challenge assumptions in some sense and to allow that process to happen. A facilitator does the same but in our process the facilitator always has an eye on...[indecipherable]...we're always bound by time, having to fit a session in particular time parameters and also what is it the particular organisation wants to address, so in terms of where that's going there's certain parameters that we have to keep to so far as what the outcomes are.

## **3. Can I ask you about control..? I'm assuming that Management would be involved in finding yourselves and discussing costs and....**

Not necessarily...sometimes that's the case but in a lot of organisations both Public and Private sector it's the learning and development people, HR development people who are, who basically

make the decisions as to what sort of intervention that they want...

#### **4. Do they (HR) control the subject matter?**

Yeah, often they will do but depending on the type of organisation the...any sort of learning and development intervention, in other words, what does this sort of organisation need to move forward is determined by lots of other factors. Organisations will do things like staff surveys, they'll look at...if it's a Private sector organisation they're looking at the bottom line as much as anything but the thing that's common about both Private and Public sector organisations is that they'll always talk a good game about how they want to get the best out of people and that's fine, of course you would want to do that, you would want people also to be engaged in that process...you would want people to say, 'I would want to know that my organisation is supporting me to do my job as effectively as I could'...you know, why would you not want that. Where it often goes wrong, I think, is that I say they talk a good game there but when it comes to practicalities of how you do that it then gets a bit awkward, so in terms of what it is that organisations identify as to what it is that you need in order to achieve the...the...most modern organisations run with targets, whether they're financial or...or...financial business targets, whether they're development targets in other areas or wherever you're running with targets and in the Public sector you'll get targets in terms of making sure people have, for example, raised awareness of diversity legislation...you know there's a whole load of things that are there, some which are imposed on organisations from the outside because they are legal requirements and all the rest of it, organisations will also set their own targets, so HR and development people will look at those and say what do we need to try and do to achieve that and if it's in the 'people' frame, in other words, getting the best out of people then...and certainly that's an area where our work lies, that's where *all* our work lies.

**5. Can I just ask you, looking at the long-term, how do you think Forum Theatre can be successful dealing with long-term issues of Equality and Diversity?**

Not on its own. I think it's really...what Forum Theatre has is very powerful and it's very engaging, it's...we have witnessed and been involved in moments of epiphany for not just the characters involved in the Forum but also for participants...they realise things about what's been going on and about their own environments that are very important. The key thing however is that...the opening up of that and the raising of that awareness..and..and the..you know..the realisation of what actually needs to change cannot actually...can't exist on its own, so what has to happen after that there has to be a commitment from the organisation to use what comes from the event in a way that then actually makes any change sustainable...I think that's a real problem and a real challenge for organisations and it's a challenge for us as well because it's very easy for us to go into an organisation and I can always guarantee you, the only thing that I will ever guarantee to a client is that the event will be something that participants will be engaged in...it will often be like something they've never experienced before ...it will be, particularly in the training frame, most people have a fairly, I think, fairly low expectation of training, often on learning and development – we tend not to call it training – but the expectations are low and at best people often think 'well at least we get some time off the job' and so there is low expectation there and, you know, we can challenge that very effectively and that's fine. But the challenge for us is not *that* because that's the easy bit actually, although the events that we create are very sophisticated and they take a lot of time and we work very hard on them and we make sure we try and get it right for the client, but it's what happens *after* is absolutely key and taking what's happened in the event and actually using it and making sure that any change that's identified is supported by the organisation, so if individuals identify something they need to do in terms of action that they want to do the organisation then supports that then that allows it to be sustainable.

**6. Have any of your clients reported back any tangible, positive changes within their organisation as a result of using Forum Theatre?**

It depends on the client because some clients will say...we will always at the initial stage, we will always say to clients 'well look, ok, you want a Forum ..we can do *that* event, here it is'...we also ask, 'what are you doing in terms of supporting what comes out of that event?' and often they will say, 'you leave that to us...don't worry, we'll deal with that' and we'll make suggestions to them about, you know, coaching, action-learning sets about the various sorts of things that are available in terms of supporting that learning that's taken place and actually making sure that there is real change. But...you know...it really...from our perspective it really depends on what the client is prepared to go...we'll support the client, but of course there are costs attached to that and, you know, I think some clients will look at that and think, 'well we're paying this for the event and that's fine', but another client will actually use the event in a much more organised...in a much more focused way, so that they *do* support the staff through the learning. In terms of how effective it is, it's very difficult to judge and there's not a huge amount of evidence, in fact we're at the moment engaged in a process of collating existing evidence and also creating more evidence with our own...because as I say the event itself is efficacious, it's whether, in the long term it actually does have an effect and if there are...if there is a tail-off in terms of what the effect of the event has been then that needs to be addressed and in the sense, you know, we can only assist organisations in that, organisations have got to have the wherewithal and have the commitment and the focus to do that themselves, if they're taking it seriously...I'm also aware some organisations use us as a way of, because of the power of what we can do in a forum and because of the...the...because it's a different thing as I said in terms of the experience people have had of training, people use it for that reason, so they'll get it in

because its..[indecipherable]...different and then not necessarily, you know, do something else with it, and that's fair enough as long as, you know, you feel that having those sorts of limited objectives for it, fair enough, because...but...in a sense, I think it's a...a...missed opportunity...I really genuinely think it's a missed opportunity.

**7. I think it would be very interesting to have elements of what you do, Forum Theatre as part of a long-term strategy or of using Theatre as a long term business process...the repeat business for yourselves would be phenomenal, I think..**

it would, but I think there is diminishing returns because I think the power of the event itself for people who have never experienced it before is so potent that if they experience it again, even if it's a different scenario, different actors, different subject matter, it's still diluted in some way because it's not the first time and so there is diminishing returns there, so I think that, you know, it's really important that it's used in a way that to its maximum but it's supported by other interventions, that's very, very important..and that's just partly because of the culture we live in...most people's experience of drama is soap on TV...most people don't experience live theatre, they maybe go to a pantomime at Christmas or something but the reality is that most people don't experience live theatre and actually I could probably..the other thing I could probably guarantee is that for a lot of people the theatre experience they have with us is probably the best they'll ever have...you know, that's the reality of it because they haven't experienced an awful lot of it..(laughs)..but also because the theatre experience we provide is so interactive...people genuinely do have ownership over the process...you know, they're they go, they take it wherever it goes and we facilitate that and that's a really powerful...powerful...it's a powerful experience and it's a powerful tool.

**8. Have there been instances whereby Management have perhaps been sitting in on a session and there have been some sensitive issues that have arisen and Management have stepped in and said, 'this is going too far'...?**

No, never...doesn't work like that. I remember you asked that question at the sessions...it doesn't work like that because, if that was the case then we wouldn't be in that organisation in the first place and managers will tend...managers on the whole and certainly the clients we deal with are actually quite open...there's a lot of organisations we deal with who use 360 degree feedback, you know, so they *know*...they're very open and they know if they're not actually up to scratch on things. There are maybe things that are going on within an organisation that because there is always the real culture of an organisation as well as what the presented culture is... there's other things that go on, we all know that within organisations and a lot of it is very negative at people...and sometimes in organisations, of course, there will be those flashpoints where you will get allegations of bullying and harassment or stuff like that, for example...and that becomes very difficult for an organisation and very critical for an organisation because of the legal implications, so they have to make sure that everything is in place for that but at the same time they have to be honest about what's gone on and find a way of dealing with it...that applies to senior managers as well and you'll find often that depending on the organisation sometimes we will do a session that is aimed at a range of staff at different levels so we'll get some senior staff in with more junior staff, but often it will be specifically targeted at a particular level, so there would be, for example, a chief exec and the chief exec's senior management team and we will be working with them on specific things that they need to be looking at and that's not about reinforcing where they are that's about challenging them and

actually saying, 'why are you doing this?', you know, 'where's your understanding of the effect that that's having on the people you're managing?', and then we'll work with...you know...we're doing a session in September with domestic staff in an NHS organisation, so there's a whole range and in that particular one because the issue has been the fallout from bullying and harrassment, we decided and I recommended to the client that actually managers were not in that session...it will free up those people involved to be able to say the things that they need to say and be able to..to...you know...and it's not about, it's not because the manager will say 'you can't say that', it's because there will be a self-editing process going on, you know, people will think 'I can't say that because my manager is here', so it's more likely to work that way than the other way round, so that would be why we would in particular situations, and we do a lot of research on organisations before we embark on a project with them, so we get a real sense of what's been going on and what the culture is like and we'll talk to people, who without their managers there...

#### **9. It would be interesting to ask you what research you carry out within an organisation...**

What we do, we focus our research on stories because effectively what we're doing...we're creating a narrative. At the start of a narrative the participants then take over and they run the narrative...they let the narrative run the way that they want it to go. So, we'll go into an organisation and if an organisation says, 'we want to...I'll just give you to an HR person, for example, who'll say, 'this is what we need to address' and I'll say, 'right ok, that's fine, that's what we need to address...why do we need to look at that?'...and you'll get a perspective from the HR person and that isn't the only story, so we'll then go to the people who are going to be participants and say, you know, 'what are the issues as far as you see it?', and in that sort of situation we make sure they are free to speak, you know..we won't have their line managers or whatever in with them doing...

**10. Is it one to one interviews?**

It could be one-to-one or it could be with a group...a group who are on the same...at the same level...

**11...like a focus group?**

I wouldn't call it that necessarily but it could be and, you know, they are very open discussions, so...you know...I'm not sort of focusing it down too much because we need to...as well as getting stories and actually verifying and checking out what the situation is from their perspective, which is not always the same as what you get from the HR perspective and then we put those things together and I'll go back to that HR person and say, "well, what's coming from here, is this", and I'll put that within the proposal and more often than not the HR people go, 'God, ok, ok, that's fine', they'll not say 'can't have people saying that'...you know, it doesn't work like that...

**12. Can I ask you a question...how would you react to the accusation that someone said by using professional actors to represent employees, are you not perhaps distorting reality by relying on actors' improvisations to audience questions?**

Of course it's distorting reality because it's artificial...all art is artificial...that's the point of it...you know, it's not real and it's actual power and strength lies in the fact that it isn't real but it's that allied with the fact that these adults we're working with have exactly the same ability as the young people I used to work with in a...[indecipherable]...education context, all willingly suspending disbelief, in order to explore what it might mean for reality and so people have a much more sophisticated

approach than perhaps the question you're posing would suggest because...*they* know it's not real...they know they're actors...but we've also had people saying, 'God, that's just the way it works for me', and that's why it's important to get the research right so what you present is a familiar culture so we're not presenting reality, we're presenting a piece of theatre, a piece of interactive theatre, which is...which actually touches some of the cultural and personal things that are going on for the people that we're working with. So, in terms of distortion...*of course*, it distorts it..that's the point of it in a sense. If it were real, and Boal uses...and Boal *has* used in the past, although he still uses a convention called 'invisible theatre', which is were you go in and you pretend that what's happening is real, participants don't know it isn't real..and, there are all sorts of moral issues when you're doing that, so there's reality for you in terms of perception, but there's actually...there's moral issues around that, should you be actually leading people up the garden path...Boal is well aware of the issues around invisible type theatre. It's something that we've fluttered with in the past, we haven't actually gone down the route of using invisible theatre to a great extent but the artificiality is really important ...that's the key...allowing that little bit of distance for people to be able to see what's actually going on and being able to relate that to their own experience and people are sophisticated enough at all sorts of levels to be able to do that. They can sit there and engage with the protagonist and talk to the protagonist as if they were real...but they know it's an actor...

### **13. I think you still strive for a certain level of accuracy...?**

We strive for believability, so in terms of the...and this is perhaps where again we would diverge a bit from the more traditional Boalian model is that we spend a lot of time on character, so...you know, we would take an approach which is more...sort of akin to Mike Leigh in a sense that we would want the characters to be drawn and played to a level of believability that would allow that to

exist in any situation because it may well be the participants suggest a particular situation and they're free to do that, so the actors have got to be able to recreate that and they've got to make it believable and so we put a big premium on believability of character and spend a lot of time working on that and we also work with actors who are able to do that and to improvise very well within the constraints of their character and they will only do things that are within the constraints of their character. Often you've got a situation that someone might suggest something to the protagonist and the protagonist might say, 'I'm not comfortable with that...I'm not comfortable with that because...', there's another dynamic going on there, which is not just about, you know, telling someone what to do, it becomes coaching...you know...and effectively what the participants are doing they're working within a coaching frame with the protagonist in order to influence that protagonist to influence the antagonist in the coaching frame and that's effectively the way that it works and that's why coaching is one of the interventions as a follow up can be so effective.

**14. In terms of using professional actors, would it not be more empowering for employees if they were to act out their own stories?**

They can do that, yes...

**15...do you do that as well?**

Oh, yeah...yeah. As I say we don't impose Forum Theatre on our client. We'll discuss...because we are a consultancy, we'll consult with the client in terms of what it is that they're looking for and then agree with them on what would be a possible intervention...that may be a Forum Theatre session but it also may be a workshop session, a drama workshop where we will use actors *and* we will use

participants in creating their own forums as well, so we will do that too. We use lots of other...we use what we call physical imaging, which is using...participants will create physical images of their own experience, so we'll work on that theme as well. It really depends on what we think is, in discussion with the client, what's the most appropriate intervention for what it is they want to achieve.

**16. It might depend on what the client wants and maybe the culture of the organisation?**

Yes, absolutely.

**17. Would you say that some organisations...I wouldn't necessarily want to use the term 'authoritarian' but perhaps...maybe a bit more anxious about some of the issues coming out, would they perhaps move towards using professional actors instead of getting the employees to act out their own stories?**

Doesn't necessarily correlate that...certainly in my own experience that...it tends to be organisations themselves can be hierarchical, you know, often they are...authoritarianism lies in the personal ways that managers choose to manage and the way they choose to engage with people. I don't think you get...my own experience is that I would hesitate to define an organisation as authoritarian...I define it as hierarchical and I would certainly define particular personalities, who are in an accountable management position as authoritarian...I would find others using a different style, a range of styles and really there isn't a correlation between the sort of intervention that they might choose and the

nature of the organisation, except in the sense that...the way that perhaps senior staff have influenced an organisation can be crucial in terms of the response that you get from participants..and that does, and that can...that can be something you need to work with. We can be working with groups of people who are very cynical and negative, especially in the Public sector because their experience has placed them in a particular frame and often, you know, there's a senior management issue there in terms of their inability to engage in a way that's positive. But at the same time there's a personal responsibility there as well there from everyone and that level of cynicism and difficulty and challenge is actually very good because...we're not afraid of that, we can work with that and actually the reality is in terms of the event, if you're working from...and it's never an entire group, you know, there may be pockets or may be one or two people who will articulate that and it isn't and often they will set themselves up and say they're speaking for a group when actually they're not...they're getting the opportunity to articulate what they're feeling and that's fine...and what happens is that if through process then those people actually are...their awareness of reality of the situation is raised but also their experience is acknowledged and that's really important and verified that that is their experience then through the process and at the end of the process actually it can be even more powerful because of where you've started from...so our journey's been more difficult but when you get to the end of it, it can actually be more powerful...so it's really important I think that there are...there's a whole range of potential starting points with people and that's what happens because people's individual experience is different and people have different personalities and some people have different learning styles. So, you're having to manage that and deal with that through any event whether it's Forum or anything else, you have to be accountable and take account of that and you can use it...our view is that it can be very useful.

**18. One final question, from your own experience what's the most common type of intervention..what's the most common reason for a company contacting yourselves for your services? What are they trying to unearth in their organisation?**

It's difficult to say because there isn't one...there really isn't one particular issue within organisations. As I say it really...all organisations have targets set and have things that they need to address. They'll come to us because we have a way of doing that for organisations and there really isn't...I mean we work in the area of 'diversity' and raising awareness of diversity and equality issues...we work in the area of performance management and leadership development, we work in practice development in the NHS...anything that's actually about addressing what goes on in the workplace environment and specifically what's going on between people...I would say that's what's it about. People wouldn't come to us if what they were wanting to do was something that was something you could do better with PowerPoint, so that's the reality of it, but so all I can say in terms of what's most popular is anything to do with people and...you know...there's a whole range of stuff there, really...but there's another area which is we work very creatively because we're using an art form, in a sense...I would like to work creatively with clients and often clients who come to us will often have a...even if they don't have experience, they will have an instinct that they want to work with something imaginative in a creative frame because they have a feeling that it is either different, as often it is, or it's an interesting way to work.

## **Appendix X**

### **Interview 5 – Coding Analysis**

#### **Questions 1 and 2:**

#### **Comparison of Boalian theoretical Forum Theatre framework with one commercial Forum Theatre consultancy's application**

##### **Boalian theoretical framework**

- Response to oppressive situations
- Empowering a protagonist
- Challenge oppression
- Oriented towards action
- Audience directs action
- Marxist revolutionary theoretical underpinnings

##### **Forum Theatre consultancy's approach**

- Oriented towards action
- Implement Forum Theatre interventions in organisations
- Focus on 'people' agendas and learning and development
- Other interventions used other than Forum Theatre
- Active preliminary engagement with organisation
- Forum model created will actively reflect the organisation
- Aim is to influence within an existing organisational structure
- Change initiatives aimed at Senior Management
- Gain commitment to change from employees further down the hierarchy – two pronged strategy
- Determine potential impact of change on employees
- Assess costs and benefits of potential courses of action
- Experiment with different courses of action
- Generate debate on different views and opinions
- Managing tension through a facilitator rather than a Boalian 'joker' figure
- Facilitator will question and challenge, limited however by time parameters and organisational requirements

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#### **Questions 3 and 4 – see also Question 8**

##### **Control of the Forum Theatre intervention**

11. HR often control Forum Theatre subject matter
  12. Organisations want target driven results arguably impracticable to Forum Theatre
  13. Unclear from interviewee what organisations want...organisations seem not at all confident about the subject matter
  14. Consultancy aligns clients' target driven needs with 'people' issues
-

**Question 5:**

**Forum Theatre's potential in dealing with long-term issues of Equality and Diversity**

14. Needs to be included in a broader range of interventions
  15. Organisation must use the issues raised by Forum Theatre constructively and strategically to foment sustainable change
  16. Problematic and challenging, however, for both consultancy and commissioning organisations
  17. Consultancy can only guarantee Forum Theatre's unique **process** not that it can seriously institute change
  18. Organisational support systems are key to future progress
- 

**Question 6:**

**Evidence of reported, tangible organisational change directly related to a Forum Theatre intervention**

- No evidence
  - Exercise ongoing to collect evidence
  - Consultancy offers to support change and suggests appropriate support mechanisms
  - Organisations must take responsibility
  - Missed opportunities to move forward
- 

**Question 7:**

**Forum Theatre as a long-term strategy and business process**

- Diminishing returns
- 

**Question 8:**

**Management response to sensitive issues being raised.**

- Managers and clients accept sensitive and controversial issues being raised and debated
  - Organisations who support open debate tend to commission Forum Theatre
  - Forum model developed to challenge change initiatives and the effect this may have on employees
-

## **Questions 9, 10 and 11:**

### **Preliminary research on commissioning organisation prior to Forum Theatre intervention**

- Interviews with different participants to gain multi-faceted perspective on subject matter
- Generate narrative from this
- Interviews with staff take place without line manager being present
- Focus-group style discussions also carried out

## **Questions 12 and 13:**

### **Distortion by using professional actors**

- Free admission of distortion, artificiality – herein lies the power of Forum Theatre to explore
  - Assumption that audience freely suspend disbelief
  - Robust preliminary research carried out to ensure believability rather than realism
  - Believability allows audience to tackle cultural and personal issues and relate the Forum Theatre narrative and performance to their own experience
  - Actors will only perform within the constraints of their character
- 

## **Questions 14, 15 and 16:**

### **Using employees rather than actors to encourage greater empowerment**

- Consultancy can also facilitate a Forum Theatre intervention in which employees act
  - No information on whether organisations freely allow employees carte blanche on subject matter
  - No information on whether using employees rather than actors would be more beneficial
  - Physical imaging also used
- 

## **Question 17:**

### **Organisational culture and management style correlation with Forum Theatre model choice**

- No specific information on whether a less open, more authoritarian organisation would be more prone to use professional actors rather than allow employees direct participative role
  - Organisations described as hierarchical, not authoritarian
  - Authoritarianism exists in individual manager's choice of behaviour, not organisational structures
  - No correlation between choice of Forum Theatre intervention and organisational culture
  - Senior Management can influence employee feelings, attitudes and behaviours due to lack of engagement
  - Public Sector employees especially can be cynical about the Forum Theatre process
  - A difficult starting point can be potentially very rewarding, if the participants recognise Forum Theatre's positive qualities.
-

**Question 18:**

**Reasons commissioning organisations have for employing Forum Theatre interventions**

- No particular reason
- 'People' issues – performance management and leadership development

## Appendix XI

### Interview 5 – Transcript

#### **1. What were your impressions of the Forum Theatre session?**

I thought it was a good session in the sense that it engaged the audience's attention and it was also I think trying to bring out some serious messages in a very softly, softly, gently, gently manner so not to offend I think people's sensibilities or even comfort zones...

#### **2....in the audience...?**

Yes, in the audience.

#### **3. Do you think that's a good thing...having this kind of 'softly, softly' approach rather than having a more controversial, confrontational, direct approach making people feel a bit more uncomfortable?**

Personally, no. I think we should be more challenging, pushing the boundaries and I thought what they did was nothing new from my perspective and nor was it, kind of, challenging to that great extent, but I think looking at the diverse range of audience who were there from the Education Sector to Public Sector Bodies like the Police Services, the Fire Services, the Post Office and so on, I guess it...it..different skillset there...and so it would have appealed to a great many people there.

#### **4. Do you think that the session was successful in terms of getting the message across about the Mental Health issues at work?**

I think it...at one time we started to duplicate some of the information and I think it was...it struggled...it captured the attention initially, the whole idea of the theatre element of it, the acting and so on but suddenly I think it started to really struggle in trying to get the whole thing of the engagement off the ground and when it did get the engagement off the ground when the audience

started to articulate suddenly I thought we were pressed for time and then we were kind of almost kind of moving on rather than hold onto that particular perspective or particular angle.

**5. But do you think the Theatre company were successful in getting the message across that this method is or would be effective in perhaps raising awareness of certain sensitive issues and trying to change attitudes and behaviours? Do you think they succeeded in getting that message across or do you think you would need to see more examples?**

I think they struggled and you would need to see more examples. I think a better...I don't know...my personal uptake on this kind of training would be that you bring in people who have been at the receiving end...you know, who have actually gone through the struggle themselves, they're still there, they are possibly still delivering and working at a...working successfully in one of the background organisations, be it voluntary, be it professional and so on...sorry the Public sector bodies...so I would think that would have a far greater and harder impact than bringing in actors than bringing in actors trying to...depict...and try to get you to engage with that... you might start to lose the thread and maybe in some ways become cynical that you're trying to portray a real issue and without realising, for example, if we were to talk about racism I would expect maybe a black person who has been at the receiving end of it to portray that rather than somebody else saying, 'well, I'm an actor and I think I understand issues of gender or disability discrimination', which is kind of very different....

**6. For such sensitive issues like bullying and harrassment under the umbrella of Equality and Diversity, would it be the case that using professional actors distorts what's happening on the ground?**

I think so...I think so to some extent because they're having to go by scripts that have been agreed with the organisers, behind the scenes, in advance and so on and like I said, if it were based on real people..and the real people element would be that you encourage your own...because this is about improving your own organisation to move forward and the only way they can move forward is to see the impact of particular qualities of Equality and Diversity on those individuals and so if it is

about bullying and harassment, then maybe have someone who's actually said...[indecipherable]...'at the beginning I thought it was a figment of my imagination...[indecipherable]...going through the whole of this process and I went through the informal stage to the formal stage and, look guys, I'm still here, and I believe this is all about what good employment is, this is about good management so they've learned as well as I've learned, it has skilled me up, it's given me the confidence' and so on, so I think that's more powerful than any of these actors can portray...I don't think they portrayed that...I think that possibly the word would be, if there is one word to describe that it would be that they lacked the passion to deliver because they are delivering to a different agenda altogether.

**7. Would you say that perhaps the actors were portraying a more objective view, would that be an accurate term to maybe apply?**

That's one way of, kind of, assessing or concluding...but I don't think it's that, I think it's about not fully understanding, it's about my kind of take up, I think you would feel this way therefore I will portray you in that fashion.

**8. I should say that when I spoke to the Theatre company they did say that they would actually interview alleged victims of bullying and also the perpetrators and they would have this data to create a narrative, so even from that perspective, do you think there is still an element of distortion?**

Yes, I think so because I think it would lack the emotions because the emotions are going through and somebody says, 'you know, look, it almost ruined me, almost destroyed my confidence, it kind of impacted my family life, it made me sit in the dark' and stuff like that, I think that's far more powerful than somebody trying to project that. It's almost like, I mean the analogy I would like possibly again to illustrate would be, if you look at TV serials as well as documentaries, there's a difference..the impact of a documentary based on real victims and so on compared to a drama that tries to portray people in those situations...

**9.....feeds more on melodrama and emotion rather than try to paint an accurate picture in trying to deal with real situations and trying to come up with realistic strategies to tackle the problem...?**

Yes, yes

**10. Looking at that Forum session in particular, how do you think they could have improved upon that?**

Two things. I think the introduction could have been much sharper...I think in hindsight...I've been a training facilitator so one of the things I think that I thought was a 'wow' factor was that it had a very large attendance for the workshop...there were 15 to 20 people there, which was large enough...a reasonably good size. I don't think the facilitator as it were just I think dived into it without I think possibly even assessing or reflecting people's own background or even expectations because I think I would have started with a one liner, 'what are your expectations?' and then got back to the group right at the very end and say, 'well, how did we marry up? How did we match up?', and so I think that didn't tell. I thought the acting could have been sharper, I don't think it was as sharp as I thought it could have been.

**11. You mentioned before that you have experienced other uses of theatre, how would that particular Forum Theatre session compare to what you experienced before?**

At the University here I've had an input into looking at the scriptwriting of a company we've used, *Theatreand* from Huddersfield and I thought, like-for-like comparison I thought the company we've used and I'm not being biased because I'm very new to the University here, I thought the actors were sharper in their presentation...I think it could be because I think they do these on a regular basis for the sector rather than just simply, just in Glasgow. I thought the...there always a feeling of the actors were clued up about the subject area, so the melodramatic element of the conference workshop and the one that I've observed here has been very different and also to be fair at the end, I gave feedback and the facilitator at the University took those on board.

## **12. Do you think it's worthwhile having a one-off Forum Theatre session?**

Difficult one, I think...no, it requires regular, I think regular delivery, I think it requires regular delivery for all types of audience...I think if you're hard pressed for time and if you have to aim at a particular group of staff at the institution I would aim at Senior Management to kind of get it going backing it up with some other forms of workshop types of interactions and engagement. I think a one-off will simply give people a taste but not literally the opportunity to discuss the details. So, 'what does that mean for me? How does that apply here? What do we do right here', and so on because also another way of looking at it is that, if there is a criticism or gaps in both the conference workshop as well as the one at the University here is we don't talk about University policies, rules and regulations, other than provide powerpoint slides to say, 'oh, by the way the context is Glasgow has X polices, Glasgow has this unit, the Equality unit to provide you with support guidelines and whatever. But there's no engagement to say, 'what does that mean realistically?', so let's walk and talk through a policy so I would expect different audiences to, kind of, seek that but the one-off won't deliver that for you.

## **13. How do you think Forum Theatre could be implemented over the long term?**

My approach...my take up on this would be to develop an in-house, almost a training group to kind of guide you through that rather than rely on a professional company from outside...

## **14...actually training people to do Theatre that would then go around the campus?**

Yes, but actually backed up by a range of support that's available. I don't think any organisation realistically can sustain bringing in externals and straining resources to justify that and even I couldn't do that. Like you said, I'm an advocate to some extent but not necessarily having been won over by that kind of approach. I think it always takes the heat out of real-life issues, like I said if you're the real victim of some kind of discrimination as a disabled person, as a female, as a gay person, as a black person and so on and so forth, those experiences are far more different than that could be played out.

**15. You believe it would be more effective and more *empowering* for individuals who have direct experience of these issues to actually create their own theatre...?**

Sure

**16. If we perhaps can move on to the subject of bullying, how would you define bullying?**

Well, I guess that it would mean...there are a range of ways of doing it, a simple one would be a kind of the shouting and screaming to banging doors to total exclusion, it would range from those kind of things...it could be very kind of up in your face to very covert to very hidden where *you* would only feel that as the alleged victim, as a recipient of that behaviour, so you have a social get-together or whatever...say during lunchbreak and so on and suddenly you're the only office person that's left out...and it's a pattern, it's not just...it could be one-off but it's also a pattern to it.

**17. Can you perhaps identify any common causes of bullying, not just here but perhaps in your experience?**

Lack of skills...lack of people's skills about their own abilities, I guess...seeing others as a kind of challenge to them...maybe bringing in a newcomer possibly bringing in a new way of working would be seen as a fundamental challenge to the existing order. I guess the other way of looking at it...it's about confidence level and articulation level and if you are different, you know, again for example, if you're disabled or you're a gay man or black person or whatever these are about your realities and somebody may not accept that or to any extent even respect that and so their way of dealing with this is to dismiss you or ostracise you...it is about those comfort zones and finally I guess it could be just down to blatant jealousies.

**18. Have you experienced or witnessed any bullying behaviours?**

Yes, in my lifetime, I guess the one extreme example I can use is the...when I joined the University...one of the Universities...this is my fourth University...it was down South and a large

University, within six months of my arrival and this was my probationary period as a lecturer, I'd heard in the grapevine that a black lecturer was being undermined at various meetings and so on and so forth and anyway, I decided to reach out which was rather interesting because I just thought I'm a minority person, there are very few minority lecturers and here's one person who's been got at and if he's been got at what's my future here and so I decided to touch base with this lecturer, and the bottom line basically what had happened started off with exclusion...application of exclusion to very severe criticism, so much so that the staff actually encouraged, some of them..I don't know...23 members of staff...?...who had encouraged a number of students so they collectively put in a complaint against this guy on the basis that they found his accent to be unacceptable in an English speaking University, they expected the Queen's language to be spoken rather than a dialect, which is rather fascinating because this is, by the way, going back now something like 25 years and to see now what our media are trying to do...the BBC is trying to bring in regional accents, they are the 'in' thing so it's remarkable how our society has moved on and so on...anyway the bottom line is that I decided to write a letter to the vice-chancellor at that time to say that I think this is unacceptable, I don't think this was right and I think perhaps the University in whatever it was proposing to do needs to, kind of, investigate as to how much of this was true and how much of this was...[indecipherable]...and what are we going to do about staff that are found to be encouraging the students to actually, collectively undermine the confidence and the abilities of this particular lecturer...and to be blunt with you I often think back and I think that was almost partly make or break for my career as well because I thought at that time I had done something very serious because...[indecipherable]...one and three quarter side...one side plus three quarters of A4 so almost two sides of A4 and management reacted not fairly but they found the allegations to be untrue and upheld...found the whole thing in favour of this lecturer. The bottom line is it gave me a phenomenal level of encouragement plus confidence to tackle these head-on so I lost the fear there and then, if there was any fear because my probation could have been over and I could have been out of the organisation as well but...to be fair...this lecturer, by the way, subsequently became a Reader and Professor but I also feel...I still keep in touch with this colleague and one of the things I said to him often that he should have been head of the department by now and, of course, because of that, that may have well marred that potential and it's taken him almost twenty five years to get that far...I think with a white lecturer with abilities and whatever it could possibly have been done within a decade and I've seen that happen also.

**19. What was the fall-out? What were the consequences, looking at it from a broader perspective of this particular incident? Were other staff members affected by what was going in a negative sense?**

Others...I think it was interesting because like I said it was a sharp learning curve for me as a minority member of staff and I deliberately use the word minority because the majority of the staff simply sat silent and one or two people actually said to me that I think I've made a mistake and I think I should watch out and should cover my back and also I could be out of the organisation, this University because management won't go for it and I said...it was fascinating because they all failed to recognise as I said because if they set one black lecturer up then it's not rocket science another black lecturer would be set up down the years and I was just beginning my teaching career and the last thing I wanted was to be daunted...but I guess also possibly when I think back on hindsight I think part of my naivety I think played a critical role in that...the naivety that drove me to do it...you know, this is wrong and this is unfair, this is not right and maybe on hindsight don't know, maybe perhaps would I have done differently, I don't know...but I guess in the job I'm in currently I'm still pushing the same boundaries, applying the same mode of operation, I've not been daunted...I don't think I'm daunted...but that doesn't mean that others aren't...others do feel scared and I've also seen, by the way, I have seen people, men and women of all backgrounds forced to leave, so I have seen lecturers forced out of the organisation and the spin by the University is, at that time at least was these people have moved on for career reasons and I think moving on to no job from a permanent job is no career move at all.

**20. Do you think that Forum Theatre could be helpful in identifying and tackling issues of bullying in particular?**

I think it...no, it's not just simply bullying, I think that all kinds of issues I think it could be good training activity, I guess is a better word that could actually look at a range of areas and bullying would be amongst those...it could be safer...I guess the sensitive areas it would be better, if they had the right people there, not necessarily actors but people with passion there to illustrate the sensitive issues like maybe, I don't know, sexual orientation perhaps, sectarian maybe to some extent and other issues around bullying and harassment, yes it could be very useful.

**21. Do you have any ideas how it could be used to do that? For example, specific examples from your own experience of how...if you thought how using Forum Theatre would be a good idea in this particular context, could you perhaps give an example of how you would apply it?**

Other than what I've already said I think it has to be a realistic input by those people who have been on the receiving end, I can't see it any other way round. It's almost like we hear regular reports coming out from different research bodies about unequal pay in our society, there's also bullying and harassment, kind of common or whatever and it's almost like we've become a society that I think these things have become institutionalised, are people just thinking well what's new then, rather than trying to tackle at a local level and so unless you have some direct input...so even...if we were to take for example...apply the Theatre type of form of training, I would expect people, the actors or whatever...you know the people who the performers are to relate directly to individuals behind the scenes and not maybe with management, who might just bring up scenarios, you know I could just make up some scenarios and run them past some people and just come out with the fixed outcome that I want...but listening and negotiating with people is a different thing altogether and they might say 'well hold on, you don't arrive at that' and in any case there is something you said earlier on in our conversation, which was some of these things are impromptu anyway so if you ask a question somebody expects you to respond to that.

**22. How would you facilitate the session, for example if you didn't want to use professional actors and you believed that, yes it would be good to maybe use our own people and get the staff to create their own theatre, would you be worried about any potential conflict, any overt subjectivity or things that could possibly create even more tension rather than actually helping to tackle and resolve the issues?**

Yes, you would need to draw boundaries and one of the key boundaries would be house rules and the second would be identity so say for example you only work with people who are more than willing to participate and contribute to the session. Once you have secured their agreement then you draw almost like a protocol around that and make that very, very clear to workshop participants and also making it very clear to them by the way that, you know, during the course of this training you will be exposed to some sharper elements of our organisation that you might be aghast at but by the way let us assure you that we're tackling that and that's the reason why you're here, so I think our

ways and means of doing it...just simply to throw it and say, 'oh, I think it's a good session on Equality'...no, today you're going to be introduced to Equality and Diversity or a dimension of it...you know, welcome to this workshop let's get going...I think that simply floors everybody, people might feel excited by that but personally I don't.

**23. Do you think there are any ethical issues in using Forum Theatre and that could mean both using professional actors and asking staff to create their own theatre?**

Yes, because you're looking at people's vulnerabilities at the end of the day and it's almost like a kind of subject survey you may wish to carry out with a range of people that you might need kind of approval and consent and so on and so therefore if you're dealing with people's vulnerabilities you need to be mindful of the receivers of that, all people exposed to that, how would they feel, how would they deliver..I think the best and I don't know this is maybe my pipe dream I guess the best example of this kind of training would be where you have the two people involved that have been at the receiving end, for example you are the line manager and I've been the alleged victim and therefore we've gone through the process together and in the both of them the bottom line should be we have both learned. I've come to kind of realise that our...[indecipherable]....regulation and I didn't realise that, that the manager openly says 'look...[indecipherable]...I've been through the process...it's been painful on both sides but we've moved on.' Now whether we'll ever get to that in any organisation your guess is as good as mine...I'd like to see that...that's about pushing boundaries.

**24. That would depend on the culture of the organisation as well....?**

It's about politics as well at the end of the day...that's the bottom line...

**25. Going back to the ethics, perhaps it's unethical to get employees to go into a situation whereby they believe that they can change things but in reality things cannot change?**

Yes, but that's what I was saying earlier on, it's about confidence, being able to challenge those

things, it's kind of like a third party perspective but a third party perspective doesn't deliver at the end of the day my reality that I may still be discriminated, I may still be the victim or whatever and so the very organisations that has brought in or tried to deliver this training is guilty of carrying this out in the background.

**26. What challenges might there be within your organisation if you decided to use Forum Theatre to highlight issues of bullying?**

I guess the challenges would be about...the one that I can think of possibly would be around expenses, cost effectiveness because if you're in a business scenario you're always looking at the bottom line. I guess because the Equalities team has been set up and have been mandated with creating awareness I think legitimately we can justify this form of training, but like I said having said this, if I was on the receiving end of it expected to sit there for half a day or a day one of the things would be, 'gosh, this is really expensive for this time and effort', so it's almost like a kind of cynical side to it. I don't think there will be any resistance from senior management...sorry, having said this of course I would be gobsmacked if there was because if the...I believe when you appoint an Equalities person you're almost holding your hand up to say, 'hey guys, we haven't done anything right in this area' and therefore we would like these things sorted out, corrected, modified, remedied or whatever...so therefore I think any organisation that actually appoints an individual with whatever kind of brief, full-time, part-time, one day, half day, couple of hours per week or whatever it's automatically admitting that but you will not hear that from any manager because they will not see it that way at all but I think that's what it is. So, once you've appointed the professionals in this area you have to be guided by those professionals.

**27. How would you measure success? For example, if the Principal approaches you and says, 'this looks really good, but how are we going to measure tangible benefits?', how would you do that?**

From our perspective the key thing would be to introduce critical monitoring so one of the things would be to look at the participants that have attended, for example if there was a senior manager group and then to start looking at very carefully the issues that are coming through in their areas of

responsibility and try to tie it up with those individual areas. Once the pattern has been established it will my job or my team's job to go out and actually try and get it through with those colleagues to say, 'have you attended that?' and 'how did it go?'...[indecipherable]...and 'these are the issues to be found in your area of work' and 'how did you account for that?', so you make personally people accountable, otherwise there's no other way round it, but clearly in making people accountable you need to make sure you also support them in skilling up because the last thing you'd want is this fear factor creeping in, 'my God my job's on the line, I'm now going to be got at or sacked or this institution will get rid of me' and it's not about that it's about actually getting people to feel very, very comfortable and also they have to feel passionate, I'm passionate about this area of work therefore I push the boundaries but for the others just to realise again, if there is something they need to be mindful of the world has moved on and it is no longer an option for people to think 'well, I think I feel comfortable about Equality and Diversity because the law of the land tells us to do it whether we like it or not...that's the bottom line and so the University policies should reflect that and if they reflect that people have no choice but to engage with that and our job is to facilitate that engagement.

**28. Just to finish off, are there any other comments you would like to add?**

It will be interesting to see the assessment the theatre companies themselves have made in this area of work as to how much of an impact they've made because it's a fairly new thing in this part of the world, in the UK particularly towards Equality and Diversity so it will be interesting to see how many...what percentage of public sector have brought in this form of training and what has been the impact in house. I'm not aware of any single study that has been done other than what you have been trying to do, so maybe there's a gap here, which is on both sides because you need to clearly map out the implications and impact there has been once the training has been delivered in-house but also asking those companies...what is it you're actually gaining from that.

## **Appendix XII**

### **Interview 5 – Coding Analysis**

#### **Questions 1 and 2:**

##### **Initial impressions of Forum Theatre**

###### **Critical enthusiasm**

- Engaged with the audience
- Sensitively and subtly raised awareness of serious issues

###### **Critical unenthusiasm**

15. A fresher, more confrontational, ambitious and imaginative approach would have been more productive
  16. Neither innovative nor challenging
- 

#### **Question 3 - 5:**

##### **Success of the Forum Theatre session**

###### **Critical unenthusiasm**

19. Repetitious
  20. Took too long to capture attention
  21. Audience perspectives and ideas were not discussed and debated properly at length
  22. Time constraints
  23. Use people who have had direct experience of bullying and harassment rather than actors
  24. Using actors can potentially introduce cynicism to the Theatre process
- 

#### **Questions 6 - 9:**

##### **Using employees to create their own theatre rather than using professional actors**

###### **Critical enthusiasm**

- Using actors is distorting
- Having employees act out scenes from their own experience is more authentic and real
- Using employees is more inspiring
- Employees' direct experience enables a more accurate mapping out of bullying and harassment survival strategies
- Actors lack the passion – an important issue from an Arts Based epistemological perspective
- Actors, who lack the direct experience of bullying and harassment, cannot hope to fully understand someone who has – a vicarious relationship.
- Analogy used of comparing a documentary – people who have had or are experiencing a

- phenomena – with a television drama presenting the same subject, using actors performing from a script
- Forum Theatre session relied more on melodrama rather than realism
- 

## **Questions 10 and 11:**

### **Suggestions for improvement**

#### Critical unenthusiasm

- Sharper introduction
  - No consideration to audience expectations or reflecting on audience background
  - No post-production assessment or discussion to reflect on whether the themes were effectively communicated
  - Acting could have been sharper
  - Melodrama may have disguised a lack of knowledge
- 

## **Question 12:**

### **Advantages and disadvantages of commissioning one organisational Forum Theatre session**

#### Critical unenthusiasm

- Cannot realistically engage effectively with the many questions and issues relating to Equality and Diversity
- Requires regular delivery

#### Critical enthusiasm

- Can be included within a broader package of interventions
  - A one-off session should be aimed at Senior Management in the first instance
- 

## **Questions 13 - 15:**

### **Contextual application of Forum Theatre in interviewee's organisation**

- Develop in-house training
  - Cost constraints of using Forum Theatre consultancy over the long-term
  - Theatre sessions supported by a broader package of interventions
  - Problems may arise if Forum Theatre perceived as 'containing' or 'diluting' real-life issues
  - More empowering and more appropriate for employees to be directly involved
  - Create boundaries and house rules to avoid negative conflict
  - Identify employees who want to take part
  - Make clear to participants that they may be surprised or shocked at the issues raised
-

**Question 16:**

**Definition of bullying**

- Overt aggressive behaviour
  - Covert exclusion
  - Patterned
- 

**Question 17:**

**Causes of bullying**

- Lack of skills
  - Lack of confidence
  - Insufficiently articulate
  - Lack of respect
  - Jealousies
- 

**Question 18:**

**Bullying example**

- Black University lecturer undermined
  - Staff collectively encouraged students to complain about his accent
  - Interviewee contacted Vice-Chancellor to actively investigate the situation
- 

**Question 19:**

**Bullying behaviour consequences**

- Majority did nothing to intervene
  - Interviewee warned not to take matter further
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**Questions 23 - 25:**

**Ethical issues:**

- Exposing vulnerabilities requires approval and consent sought in advance
- Bringing the victim and perpetrator together is idealistic and may cause further tension
- Commissioning organisations have double-standards
- Discrimination may still continue regardless

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**Question 22, 23 and 26:**

**Forum Theatre implementation challenges**

- Financial costs outweigh potential benefits
- Cynicism

**Question 27:**

**Measuring the success of a Forum Theatre intervention**

Critical enthusiasm

- Introduce critical monitoring
- Direct engagement and follow up with participants to identify issues raised
- Participants to be accountable to tackle issues
- Support participants' efforts to explore methods of instituting change
- Encourage participants to openly debate issues without fear of recrimination
- Long-term dialogical process – assessment of success will depend on interviewee's analysis of participants' feedback and evidence of change on the issues raised and identified from the Forum Theatre session