



CHAPTER 2:

HOW DO SPOOKY MUPPETS GUIDE SCROOGE THROUGH TRANSFORMATIVE LEARNING?

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Mikezilla and Markzilla arrive in a strange new country, the Realm of Pedagogy. Completely lost, they look around in bewilderment. ‘Why are we here?’ they ask, shrugging at each other (they do this a lot). A voice booms from the mist: ‘Indeed, why are you here? Because on this journey you will learn about learning! But first, you must prepare yourselves to be transformed by that learning. ‘For what is a journey if it does not result in your own inner journey?’ The Zillas nod wisely, as if they understand any of this. Then! The mist clears. The landscape opens up. They see their first hint of what lies ahead: Mezirow’s ten phases of Transformative Learning.

This is the starting point for the metanarrative of our Zillas on their learning journey through a fantastical pedagogical world. If this were a Disney movie, they wouldn't hit transformative learning until near the end of Act 2 (apotheosis), but as it's such a critical part of characterising and understanding your own and others' learning journeys, it fits in best here, nice and early, as part of the groundwork.

As you make your way through your own pedagogic learning journey, and (on a smaller scale) this book, you may well find your existing views challenged. You may consider your experiences in new lights and contexts. These experiences may come together to transform what you know, and ultimately how you interact with the world. They may also help you understand why people often struggle to change their understanding. This is, in essence, transformative learning, which will be explored in this chapter through the lens of *The Muppets*, and the question: **How do spooky Muppets guide Scrooge through transformative learning?**

The Muppets and The Muppet Christmas Carol

Jim Henson's Muppets and, by extension, *Sesame Street*, fall into the *Harry Potter* and *Star Wars* style of pop-culture Swiss army knives i.e. they can be applied to any pedagogy you care to point them at, and therefore should be used sparingly.

The Muppets is the single best family comedy/variety show staffed exclusively by semi-professional puppets and monsters, and headed up by an earnest and conscientious frog. They were the brainchild of Jim Henson, an accidental puppeteer who had foam-based characters getting up to mischief as early as 1955 with *Sam and Friends*, before hitting it big with *Sesame Street* in 1969, and then hitting it even bigger with *The Muppet Show* in

1976, bringing together decades-worth of characters and ideas in a glorious chaotic mess of fun, farce and muppetational madness.

The core characters of the show, including (but not limited to) Kermit the Frog, Fozzie Bear, Rizzo the Rat, The Great Gonzo, Miss Piggy, Statler and Waldorf, became pop-culture icons in their own right. As the show exploded to international success, big-screen movies inevitably followed: *The Muppet Movie*, *The Great Muppet Caper*, *The Muppets Take Manhattan*, and then absolutely nailing it with *The Muppet Christmas Carol* in 1992.

The Muppet Christmas Carol is a musical comedy retelling of the classic Charles Dickens story, *A Christmas Carol* (1843), in which infamous grinch Ebenezer Scrooge – moneylender, miser and awful employer – is visited on Christmas Eve by the ghosts of his former business partners, and then by three spirits. They show him how his past has shaped his relationship with Christmas, how his Christmas cruelties are propagating outwards to affect the lives of his employees and family and, finally, how in the future his sour ways will leave him dead, alone, and unmourned.

What a sad tale this would be, if it weren't for transformative learning! As Scrooge is confronted by the realities of his life, he has a series of epiphanies, and resolves to change his miserly ways. Giant turkeys are purchased, everyone has a singalong, and the credits roll.

Why, you may ask, choose to focus on the Muppets' take on the story rather than Dickens' original text? Three reasons:

1. *The Muppet Christmas Carol* is something of a Christmas classic movie, beloved and seen by many as one of the rotational movies to watch in the run-up to Christmas each year. This level of exposure makes it a wonderfully relatable pop-culture lens, compared to the original text.
2. As retellings of the story go, it's one which stays relatively faithful to the original.

3. Muppets are brilliant and, given half a chance, the rest of this book would be about how much we love them.

There's a lot to love about the Muppets' take on the story. As with the other Muppet movies, the characters in the story are played by the characters from the Muppets cast. Kermit the Frog plays a heartfelt Bob Cratchit, Miss Piggy his wife, Fozzie Bear is Fozziewig (a take on the original Fezziewig) – and they are all very much themselves, performing two steps removed from the talented puppeteers beneath them. Their personalities shine through the roles, skating beautifully along the line between skit and a serious retelling of the story. The Muppets are their usual chaotic, effervescent selves, adding colour and humour to the story, and at the core of that story is Michael Caine, who plays Ebenezer Scrooge dead straight down the middle. A steely-eyed portrayal of the character and story – but situated within a world of Muppet madness.

Foam and fleece foolishness aside, the key story beats we need to answer our question are:

- The context: Scrooge is a 'squeezing, wrenching, grasping, scraping, clutching, covetous, old sinner' (Dickens, 1843). We see his rottenness demonstrated in relationships with employees, family and the community.
- Scrooge is confronted by the ghosts of his late business partners, Marley and Marley, suffering and burdened by chains forged during their life through their avarice and greed. They warn him that he will be visited by three spirits, that he is heading down a similar path to them – and that this is his chance of redemption. They do this through a very catchy song.
- Scrooge is visited by the Ghost of Christmas Past – a horrifying china-doll puppet, coming in at second place as

spookiest puppet in the movie. The ghost transports him to the past, where he sees himself growing up. First as a boy in school, abandoned there by his parents. Next as a young professional fussing about costs at Fozziewig's party, and meeting his love interest. Finally, he sadly parts ways with her – their relationship having not panned out, due to his miserly ways.¹

- Scrooge is returned to his room to reflect, and then visited by the Ghost of Christmas Present – a jolly spirit who takes him to visit his own family, where Scrooge's unpleasantness is being ridiculed, and then to Bob Cratchit's family home, where Bob and his froglet/piglet children and wife live in poverty, and yet still manage to pull together Christmas spirit and generosity.
- Scrooge returns once more to his bed, before being summoned by the spookiest Muppet in the movie – the Ghost of Christmas Yet to Come – a silent, grave-cloth draped wraith. This final spirit takes Scrooge to a future where the town celebrates the death of an unloved and unmissed miser. Scrooge is horrified to discover that the person in question is him, and begs the spirit for one last chance to redeem himself.
- Scrooge is returned to his bed and, magically, it is now Christmas morning. He leaps out of bed 'as light as a feather, as happy as an angel, as merry as a schoolboy' (Dickens, 1843) – throws money at a passing urchin to buy a massive turkey, and sets about sharing his wealth with the community. He is a man transformed, and from then on, Dickens writes,

1. Useless trivia: There's a song that was cut from the original showing of the movie that properly conveys this plot point, which in the original otherwise leaves you guessing. It's been re-added to more recent cuts, and once you've watched it you'll see why it was cut. Bless Michael Caine, he hasn't got a singer's pipes.

‘it was always said of him, that he knew how to keep Christmas well, if any man alive possessed the knowledge’.

And so, with Scrooge’s transformation from grinch to pillar of the Christmas community identified, we can segue neatly into a discussion of transformative learning.

Mezirow’s transformative learning

Transformative learning is a learning theory that describes how people use critical self-reflection to consider and challenge their own beliefs, either changing their thinking and world-views gradually over time or suddenly in response to lightbulb moments and dilemmas. The meat of the theory is ten phases that learners go through during a transformative learning experience.

Jack Mezirow (1994) outlined the different elements while conducting research with adult women who successfully studied in public universities. His work has stood the test of a few decades – he began work on it in the 1970s, and published major works on it in the 1990s. Since then, original articles and case studies have built on his early work.²

As we dig into transformative learning, it’s worth bearing in mind that, presented as an adult learning theory, it interweaves a professional context with deeper changes to understanding and schema³, the networks of interconnected understanding, thoughts, ideas, memories and associations that learners develop to remember, navigate and use what they know. While this is great in the context of the original research, we have found that it

is also wonderfully useful for giving a narrative to the process of changing, thinking and understanding.

We also need to clarify some of the language associated with it, namely ‘objective understanding’ and ‘frames of reference’.

Transformative learning occurs within the context of the learner. Every learner has a body of experiences they’ve accumulated through life, things that they’ve done, that have happened to them, that they’ve heard about, read about, seen, smelt, touched and so on. These experiences make up their objective understanding (Mezirow, 1994).

Learners understand and interpret these experiences through their frames of reference: cognitive and emotional lenses through which they process objective experience. These might include a person’s biases, political leanings, preconceptions – essentially any mental shorthand used to process and shape objective experiences into expectations, perceptions and feelings. These interpretations, in turn, affect how people react to behaviour, experiences and stimuli. Frames of reference are initially shaped by a person’s upbringing and build (or transform – more on this shortly) over time as they are subjected to new objective experiences.

With that out of the way, let’s get to the exciting bit – the phases of transformative learning (Mezirow, 1997). Remember how we said earlier that there were ten? Well, there are only six you really need to bother with for now:

1. **Disorienting dilemma.** The catalyst for transformation.

When presented with an experience, a learner’s objective understanding and assumptions do not match previous experience, causing a ‘disorienting dilemma’. Despite the name, this dilemma can range from a small incongruity (unexpected data in a test, a surprising response to an email), to something large and disruptive (a hero disgraced, a barking cat, a law of physics challenged).

2. Some folk call it an adult learning theory, or andragogy, which is in turn an excellent example of pedantagogy. But we digress.

3. We’ll go into these in a little more detail in Chapter 13 on BeanDad and constructivism.

2. **Self examination.** Following the disorienting dilemma, the learner carries out a self-test of their beliefs and understandings, reflecting on how past experiences may or may not connect to the dilemma.
3. **Critical assessment.** The learner assesses their past assumptions, reviews those assumptions critically, and checks their validity. Accepting that some previously held assumptions may be wrong or incomplete opens up the potential to assimilate new (and previously incompatible) information. This is the stage where frames of reference begin to transform, based on the new understanding, integrating the new experiences.
4. **Recognition of shared experiences.** A look inward is followed by a look outward. Have others had their understanding similarly challenged? Have they shared similar transformations?
5. **Exploration of options for new behaviour.** With their new understanding in hand, the learner explores how it may impact interactions, actions and relationships. Essentially, how they will apply the updated frame of reference going forwards.
6. **Planning a course of action.** The learner looks to implement changes to behaviour based on the new frame of reference.

The other four phases (7-10) deal with how learners integrate the transformed frames of reference, try out new roles, build their confidence and ultimately translate this into different actions, where the transformation becomes observable by all the cool behaviourists watching. While it would be good to discuss this here, these are also steps learners go through in Kolb's experiential learning, which we'll be covering in depth in Chapter 12. So, for now, let's just focus on the key bit – the transformation itself. This is enabled by:

- **Critical reflection** – being an autonomous thinker
- **Rational disclosure** – being able to have a rational discussion (as an individual, or with others) around thoughts and beliefs
- **Centrality of experience** – understanding the experiences of oneself and others, how they have reacted, and what brought them to where they are.

You might observe this transformation process in a range of contexts, including (but not limited to):

- **Instrumental Learning** – in which an individual challenges their assumptions scientifically. 'Here's what I think – can I prove it empirically?'
- **Communicative Learning** – in which two or more people try to understand each other's differing purposes, values, beliefs and feelings, and in doing so create a new understanding. This meanders towards social constructivism, which we cover in Chapter 14.
- **Disruptive Learning** – in which life events, challenges and dilemmas conspire to force people to re-examine and reframe their understanding.

Ultimately, as with many learning theories, the core of transformative learning is pretty simple. New information, events and discussions can challenge existing understanding and ways of thinking. By engaging in rational, critical reflection you can examine your ways of thinking in relation to new objective knowledge and understanding. By seeing where these fit with your current modes of thinking, you will see where those frames of reference need to change to incorporate that new thinking. You then make a conscious effort to apply that updated frame of reference going forwards.

You may notice that this is dependent on the learner being capable of, and willing to, engage in rational critical reflection. We'll address some of the considerations this introduces later in the chapter.

This isn't the most sophisticated piece of pedagogy, but it really resonated with me, as it perfectly describes some 'ah-hah!' moments I've had since I first started learning about pedagogy. In fact, reading up about this originally prompted my own small transformative learning experience. Until we did this topic, I'd never really stopped to consider the distance travelled in my own understanding of pedagogy. Working through the phases, I was happily surprised to find I knew a damn sight more than I thought I did (still scratching the surface, but one is more than zero) – which prompted a shift in confidence on my part to engage in hurly-burly pedagogic discussion. -Mikezilla



There's a connection to self-regulation learning theory here as well. Zimmerman and his colleagues (2009) divide self regulation up into a forethought phase (task analysis and self-motivation beliefs), a performance phase (self-control and self-observation), and a self-reflection phase (self-judgement and self-reaction). When you come to think about it in more detail, it's more complicated than that because you're doing all those things at most stages. On the other hand, if you can't do those things then you're reliant on a teacher doing them for you, which is very restrictive in terms of learning. -Beckzilla



The answer

To answer our question **How do spooky Muppets guide Scrooge through transformative learning?** we need to separate out Scrooge's context and the transformative learning steps that a procession of spooky Muppets takes him through.

First, we establish the context. Scrooge's frames of reference at the beginning of the movie centre on his own greed and self interest. His habits of mind are to be miserly and penny pinching in every aspect of his life, and his points of view cause him to look down on those who either do not share his worldview, or who are poor. The behaviours we as audience and Gonzo as narrator observe that result from these frames of reference include him being a tight-fisted taskmaster with his employees, ill-tempered with his nephew, and dismissive towards charity. Later on in the movie we learn about the objective understanding that initially shaped this.

Most importantly, Scrooge doesn't like Christmas! Is this Scrooge being 150 years ahead of the progressive curve and rejecting materialism and overconsumption, or is he just a festive buzzkill? Let's step through his transformative learning journey to find out, starting with his disorienting dilemma.

Scrooge is, in fact, subjected to several disorienting dilemmas (Phase 1) during his magic-filled night, none more disruptive than the initial encounter with the ghosts of Marley and Marley. This encounter challenges him not only with the concept that magic and ghosts operate within his ordered world, but that his own soul is destined for a miserable eternity, as demonstrated by his similarly miserly and enchained peers. The subtext here is that Scrooge's actions to date have never taken into account his post-death fate, and he now finds it thrust before him.

His visit to the past, while disorienting, presents him with no dilemma – but his visit to the present and, in particular, to the house of Bob Cratchit exposes the sad reality of the impact of his miserliness. Due to his poor pay, Bob and his family live a meagre existence, and Tiny Tim (somehow sadder as a coughing froglet) limps towards death's door. Based on his solitary existence, we assume that this is the first time that Scrooge has found himself face-to-face with the consequences of his actions. Interestingly, adjusted for inflation, Bob's salary of 15 shillings a week (an allegory for destitution) equates to a salary of around £34,000, well above the current UK average wage.

Finally, in his visit to the future, Scrooge confronts his own unloved and unmourned death (and the discovery that Tiny Tim has also died⁴). The tearful fear this inspires on his part could have the behaviourists arguing that this would have been the only dilemma he actually needed to be confronted with, but that would have made for a shorter movie (and sidestepped the intrinsic nature of the transformation).

This prompts self examination (Phase 2). Scrooge's trip to the past, combined with his disorienting experience, guides him through the experiences that shaped him. Abandoned at boarding school as a child, drilled in business and hard work, he exists separate from the community of his family and peers. His breakup with Belle snuffed out his last connection, leaving him bitter. He looks inwards and outwards for what we must assume is the first time in his life.

And thus begins a critical assessment (Phase 3) of Scrooge's assumptions. These are critically reviewed (with help from the ghosts) throughout his journey. His initial response to charity for the homeless who would rather die than submit to the workhouse is, 'If they would rather die, they'd better do it, and decrease the surplus population'. This is turned on its head as

he is confronted with the imminent mortality of Tiny Tim. 'If he be like to die, he had better do it, and decrease the surplus population,' chides the Ghost of Christmas Present (Dickens, 1843).

Because this is a Christmas movie, Scrooge also finds his assumptions about the frivolity and waste he associates with Christmas have been misplaced. He has ignored the celebration of love shared within the community. As an invisible observer he is, for the first time, able to enjoy being part of Christmas.

The analogy with *A Christmas Carol* becomes temporarily wobbly as we approach the recognition of shared experiences stage (Phase 4). While we can assume that this is not the triumvirate of spirits' first rodeo, Scrooge is the only person in the movie with a story arc. Consider it more of a comment on the economies of storytelling in children's cinema than a criticism of the theory itself. We can assume that on Boxing Day, Scrooge sits down with Bob and a bottle of brandy, and recounts his spooky adventure and transformation – and that they share stories of times their own worldviews have shifted throughout their lives. Bob crossed the species threshold after all.

The analogy gets back on a transformative track with the exploration of new roles and actions (Phase 5). We see Scrooge doing this in real time throughout the movie, and then putting his new roles into action in the following phase. Reflections like 'such a meagre feast' at the Cratchits' Christmas spread indicate the wheels are beginning to turn. As the Ghost of Christmas Present passes, Scrooge begins to handle his new understanding of Christmas, and to consider what it means for him.

Finally, based on this transformation of his frames of reference, Scrooge develops a plan of action (Phase 6). On Christmas morning he springs out of bed and, in a flurry of revelation, sets out to put his new understanding of Christmas, generosity and community to work. He throws open his window,

4. 180-year-old spoiler alert

chucks money at a rabbit, compliments it, and then instructs it to purchase an enormous turkey.

He sets out into the world, donates to charity, is given his first Christmas gift (Beaker's scarf) confirming the validity of his new understanding (be horrid to the world, and it will hate you right back, be kind and generous, and the world will give you a scarf). Finally, he brings the whole town to Bob Cratchit's home, showers him with food, gives him a pay rise and mollifies Miss Piggy. He and the community all sit down to a slap-up Christmas dinner and a singalong. Even better, the narrator informs us that Tiny Tim does not die, hooray!

So then, to summarise the answer to our question, **How do spooky Muppets guide Scrooge through transformative learning?** A triumvirate of spirits conspires to instigate transformative learning. They confront Scrooge with a disorienting dilemma of ghostly goings-on, the impact of his actions, the threat of his mortality, and damnation. Shaken by this, Scrooge is guided in forming new understandings around Christmas, generosity and community, and then sets out to act on them on Christmas morning. Our spooky Muppets act as facilitators and metacognitive nudgers.



'Transformative! I'm as happy as an angel!'

A very grumpy angel

Tips for practice

So, what can you pull from Scrooge learning how to celebrate Christmas that helps your practice?

The first thing to consider is the importance of (and dependency on) critical reflection. We'll be coming back to this in subsequent chapters, because it's such an important aspect of learning and teaching. Transformative learning hinges on learners being willing and able to reconsider their own frames of reference in relation to new information, as well as being willing to make changes based on their new understanding. Critical reflection as a skill and process can be taught (Perry, 2018), but having the guts to hold a mirror up to your own thinking is an act of humility which some folk just won't have.

By giving learners the metacognitive tools they need to engage in critical reflection, you're setting them up for an easier time with transformative learning – not only in the evolution of their own understanding in their particular field – but also as they progress through life and the many disorienting dilemmas it presents. Along the way, you're likely to want to play the part of the Christmas ghosties yourself, and guide learners in transforming their understanding. As you do so, just be aware that you can't win them all – the objective experiences and frames of reference of some learners will have resulted in a closed-loop cognitive system unequipped, unable⁵ or unwilling to self-check, re-examine and change.

Another thing to draw from this is awareness of the fourth phase 'Recognition of shared experiences'. As with our other chapters in this section, it's worth considering that learning

5. Discussing reflection, and the barriers folk may face when engaging with it could fill a whole other book, but physical and mental disabilities, neuro-divergence and the good old travails of life can all throw unintentional and unwanted spanners in the works of the transformative learning process.

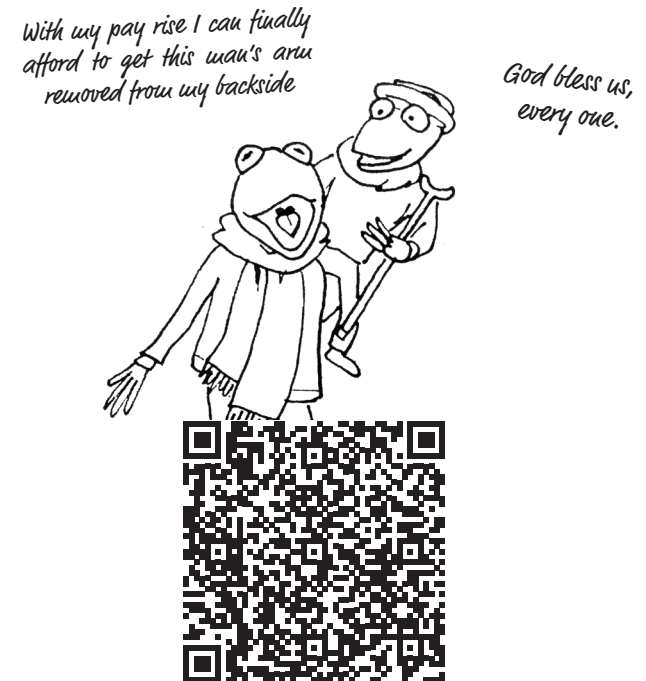
journeys are a personal experience, where context and content can change – but the mechanics of the observable process are there if you look. If you're wrestling with a new idea that threatens to wobble your worldview then give yourself a pat on the back – by matching your actions to your frames of reference, and reinterpreting them as you encounter new understanding, you're adopting a scientific and academic mindset. This will give you greater understanding of your own life and learning experiences going forwards, and greater empathy for those you see at different phases. It's a look both outwards and inwards that allows us, like Scrooge, to reexamine our understanding of others, our role in the community, and the love we share.⁶

Bah! References!

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6. What a schmaltzy way to end a chapter. If you've seen the movie, and the cult debate around the cut material, you might appreciate that it too ends on 'the love we share', except as a choral refrain for a song that was cut from the original. Neeceerd.

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