TEACHING CASUISTRY: PROMOTING A TRANSFORMATIVE LEARNING EXPERIENCE FOR THE 21ST CENTURY LEARNERS

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Abstract

This paper seeks to present casuistry as a pedagogical tool to promote what literature on education refers to as the transformative learning theory. An attempt is also made to show methodological commonalities between casuistry and the transformative learning theory in terms of being context dependent, inductive in approach and being experiential in method. Furthermore, the paper argues that the new questions and unique experiences of the 21st century learners or the so-called *facebook generation* demand the re-emergence of casuistry. Given the peculiarities of the F generation, the casuistic method is the most suited way of teaching ethics/morality that can facilitate the transformative learning experiences of our facebook generation of students.

Introduction

Education (moral/ethical) engenders not only "learned people" but "learning people". While education offers materials ("what to think about") for study, it is however, more concerned with providing tools ("how to think about") for students to be able to integrate their learning experiences to their lives.[1] In other words,

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[1]Dominador Bombongan, Jr., "Cosmopolitanism, Globalization and Theological Education," *Hapag* 4 (2007) 216.

higher education primarily functions to enable persons and communities to develop their critical consciousness so that they can examine, reflect and process issues related to the self, with God, with society, etc. Thus, it "leads" forth (*educere*) communities of persons to the challenges of the times, as it also prepares them to adequately respond to these new conditions. Furthermore, it elevates and raises (*educare*) students beyond their well-entrenched habits of mind and heart, as education confronts them with questions and issues they have never encountered before this is especially the case when confronted with novel ethical dilemmas. As Jack Mezirow puts it, the goal of adult education is for students to become "socially responsible and autonomous learners."[2] Education then has an emancipatory if not a transformative function, that is, "to gain greater control over our lives as socially responsible, clear-thinking decision makers."[3] To realize this goal, however, one has to seek some pedagogical tools towards this end. Casuistry as method of moral/theological reflection can certainly aid in the realization of this educational goal. The purpose, then of this present article is to demonstrate how casuistry as a method of ethical reflection promotes and strengthens what literature on education call transformative learning process as well as, demonstrates how casuistry enhances the transformative learning experiences of the so-called *facebook* generation.

On Transformative Learning

John Dirkx argues that transformative learning "reflects a particular vision for adult education and a conceptual framework for understanding how adults learn."[4] Accordingly, adults prefer a reflective, self-directed, and experiential kind of learning rather than an instructor-centred didactic (content) approach.[5] Differently stated, the transformative learning process provides a conducive and free atmosphere for a reflective discourse to occur allowing students to "think and rethink" assumptions that guide their actions. Thus, for Jack Mezirow, central to the adult learning process is: "[f]ormulating more dependable beliefs about our experiences, assessing their contexts,

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[2]Jack Mezirow, "Learning to Think Like an Adult: Core Concepts of Transformation Theory," in Jack Mezirow and Associates, ed., *Learning as Transformation: Critical Perspectives on a Theory in Progress,* San Francisco, CA: Jossey-Bass, 2000, 30.

[3]Jack Mezirow, "Learning to Think Like an Adult...," 8.

[4]John Dirkx, "Transformative Learning Theory in the Practice of Adult Education: An Overview," *PAACE Journal of Lifelong Learning* 7 (1998) 1.

[5]See Stephen Brookfield, "Adult Learning: An Overview," in A. Tuinjman, ed., *International Encyclopedia of Education*, Oxford: Pergamon Press, 1995.

seeking informed agreement on their meaning and justification, and making decisions on the resulting insights."[6] (1) Contextual understanding, (2) critical reflection on assumptions and (3) "validating meaning by assessing reasons"[7] are then essential elements of adult learning. Transformative learning theory aims to crystallize these elements of adult learning into a conceptual framework in aid of the concrete learning process.

Transformation as an Act of Critical Reflection

Jack Merizow's transformative theory has gain more prominence in the field of adult education. He underpins his view both on cognitive as well as developmental psychology. Known for his idea of *perspective transformation*, he stresses the need to create meaning through the act of critical self-reflection. He defines transformative learning

> as the process by which we transform our taken-for-granted frames of references (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action. Transformative learning involves participation in constructive discourse to use the experiences of others to assess reasons for justifying these assumptions, and making an action based on the resulting insight.[8]

While imagination and creativity play crucial roles in transformative learning[9] eventually, transformation in a person's perspective is the result of "the process of reflecting rationally and critically one's assumptions and beliefs."[10] Critical reflection can be described as the constant questioning and evaluation as well as revision of our experiences in the light of new information about them. Mezirow argues that "reflection is the process of critically assessing the content, process or premise of our efforts to interpret and give meaning to an experience."[11] What is being critically assessed is our meaning perspectives/frames of reference which can

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[6]Jack Mezirow, "Learning to Think Like an Adult...," 4.

[7]Jack Mezirow, "Learning to Think Like an Adult...," 3.

[8]Jack Mezirow, "Learning to Think Like an Adult...," 7-8.

[9]See Jack Mezirow, "Transformation Theory in Education," 39-79, in M.R. Welton, ed., *In Defense of the Lifeworld: Critical Perspectives on Adult Learning,* New York: Suny, 1995.

[10]John Dirkx, Transformative Learning, 3.

[11]Jack Mezirow, *Transformative Dimensions of Adult Learning,* San Francisco: Jossey-Bass, 1991, 104.

be epistemic, sociolinguistic, or psychological in nature. Mezirow writes, "[a] *frame of reference* is a 'meaning perspective' the structure of assumptions and expectation through which we filter sense impressions."[12] It conditions the way we see and relate to the world for "[i]t selectively shapes and delimits perception, cognition, feelings and disposition by predisposing our intentions, expectations and purposes."[13] Cranton holds that "the core of transformative learning in Mezirow's view is the uncovering of distorted assumptions — errors in learning — in each of the three domains of meaning perspectives."[14] Frames of reference become expressed in habit of mind (tools of interpreting experiences) leading to particular points of view.

Expressed differently, our meaning perspectives are our unconscious guide or lens in interpreting and organizing our world. While they may be useful in making sense of our environment, they can also distort/limit the way we see the world. The function of critical reflection is to identify these faulty or distorted assumptions that stunt growth so that a person can transform them in a way that his or her way of dealing with the world becomes more tolerant, open and authentic. Critical evaluation involves not only the individual but the whole community in a process called reflective discourse or dialogue. Reflective discourse endeavours at "searching for a (1) common understanding and assessment of the justification of an interpretation of belief; (2) weighing the supporting evidence and argument and; (3) examining alternative perspectives."[15] It is not therefore focused on *winning arguments* but it centres on "finding agreement, welcoming difference, 'trying on' the other points of view, identifying the common in the contradictory, tolerating the anxiety implicit in paradox, search for synthesis, and reframing."[16] Thus, transformation happens in learning when we are able to provide (a) rational/emotional/psychological justification/elaboration to existing frame of reference (confirmative) and (b) learning/ transforming/creating new frame of references out of defective ones (transformative). Transformation may be triggered by some *disorienting dilemma* which may lead the learner to some discomforts on his or her views. Such *trigger events* will occasion him or her to

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[12]Jack Mezirow, "Learning to Think…," 16.

[13]Jack Mezirow, *Transformative Dimensions*, 16.

[14]Patricia Cranton, *Understanding and Promoting Transformative Learning: A Guide for Educators of Adults*, San Francisoc: Jossey Bass, 1994, 75.

[15]Jack Mezirow, "Learning to Think," 11.

[16]Jack Mezirow, "Learning to Think," 11.

clarify, examine and assess his or her perspective which will lead him or her to explore alternative views on the issue if found defective or unjustified rationally.[17]

These, in a nutshell, are the significant elements of Mezirow's transformative learning theory. Let me now deal with the casuistic methodology.

On Casuistry

James Keenan argues that casuistry is in the comeback in our [postmodern-global] times because "we face new horizons in medical advances, international business, the geopolitical world, and the information technology that pose an unimaginable set of new ethical questions…"[18] In the presence of numerous novel moral/ethical issues vis-à-vis the dearth of principles to deal with them, casuistry re-emerges into our moral/ethical landscape. What then is casuistry?

Casuistry can be defined as a way of rendering a moral decision on a specific practical moral case or problem by examining closely the contextual factors related to the case, as well as, looking at similar cases for guidance leading to the eventual resolution of the moral problem in question. As a method of doing ethics, it "relies on the analysis of individual cases, exploring them in relation to paradigm cases and broad principles."[19] Hence, casuistry maybe referred to as a case based approach to ethical/moral problems. Armed with prudence and practical wisdom (phronesis) a casuist goes about deciphering points of convergence among analogous cases in relation to the moral/ethical problem he or she faces, as well as, identifying, specifics germane to them. With the learning he/she gains from these cases he/she then seek to arrive at the best solution given the available information.

From Aristotle, the Sophists and Cicero down to the writers of the Penitentials[20] of the 6th century and the Jesuits of the 16th century,[21]

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[17]Jack Mezirow, "Learning to Think," 22.

[18]James Keenan, "The Return of Casuistry," *Theological Studies,* 57, no. 1 (1996) 127.

[19]Jeremy Townsley, "Casuistry — A Summary," 1, http://www.jeremy.org/papers/casuistry.html, accessed on May 2009.

[20]Townsley writes: "…the Penitentials exhibit an understanding that some sins were more serious than others and should be treated with different levels of penance and judgment. The seriousness of the various types of acts were judged by situational features…." "Casuistry — A Summary," 2.

[21]Keenan on the unique situation of the Jesuits of the 16th century writes: "But in the evangelization of the 16th century many religious orders, especially the Jesuits, came into closer collaboration with lay people, through educational institutions,

these advocates of casuistry believe that any ethical/moral decision entails the need to consider the novelty of every situation or case in question and to take into account the demands of every circumstance. Rather than the imposition of universal ethical principles to every realizable situation, these writers argue for context dependence, flexibility of approach and the need for practical reasoning to arrive at the best course of action.[22] Therefore, we may say that:

> The historical appearance of casuistry has always been dependent on the existence of its opposite-ethico-legal or purely legal absolutism. It is in its nature a movement with the aim, first of bridging the gap between the abstract and the concrete, the general norm and the individual case, and second, of mitigating the rigor of laws which must produce hardness and hardship if they are not made somewhat elastic in their application to particular problems.[23]

In other words, it is a form of moral discernment that builds on the case itself rather than relying immediately on the mechanical application of moral principles to a case. There is a shift from a "deductive application of a principle to a case" to an "inductive method of comparing cases."[24]

Process and Methodology of the Casuist

Since the moral/ethical issue at hand is new, the casuist looks for related set of cases that may have something to do with the case in question (a case that looks like the present case). A case can be an event or a happening that causes the person to be in a situation of moral dilemma. The act of lining up relevant parallel/complementary cases by degree of importance or relevance to the case is called a taxonomy. This process is crucial because "it puts the instant case into its moral context and reveals the weight of argument that might countervail a presumption of rightness or wrongness.[25] In other

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spiritual direction and confraternities… To appreciate the uniqueness of the penitents' particular struggle, Jesuits inquired as specifically as possible into the circumstances affecting the sinner's conduct. These circumstances turned more closely on the person than on the act and, rather than being tools for applying the law, they were used to understand the penitent." James Keenan, "The Return," 127.

[22]See the discussion of Townsley, "Casuistry," 1-4.

[23]Werner Stark, "Casuistry," in *The Dictionary of the History of Ideas*, 258, at http://etext.virginia.edu/cgi-local/DHI/dhi.cgi?id=dv1-35, accessed on May 2009.

[24]James Keenan, "The Return," 129.

[25]Albert Jonsen, "Casuistry as Methodology in Clinical Ethics," *Theoretical Medicine* 12 (1991) 302-307, cited in James Tallmon, "Casuistry," in Thomas O. Sloane, *Encyclopedia of Rhetoric*, New York: Oxford University Press, 2001, at http://www.she-philosopher.com/library/tallmon.html., accessed on May 2009.

words, it places the case in a context of earlier moral decisions thus avoiding mere situationalism. Differently said, the taxonomy can be a reservoir of questions and may constitute lines of practical inquiry that may shed light on the issue at stake. The taxonomy is made up of paradigm cases. These are one or two cases closest and most relevant to the issue and have already achieved resolution. They then become standard in which to measure the new case at issue. According to Keenan, this "comparison helps bring to light the morally relevant circumstances that become decisive in determining the outcome of any case."[26] In short, the paradigm cases are the benchmark to which the new moral/ethical issue is judged. Part of this process of sorting out is examining the different cases for some indicators or rules of thumb or moral/ethical maxims which will guide the casuist on how to proceed in his/her own deliberation of his/her case. The maxims may lead further to the unravelling of various circumstances surrounding the individual cases. When confronted with these different similar cases, necessarily, the casuist is faced with certain realizations that force him or her to look at his/her own biases, presuppositions, assumptions and limitations of thinking that may affect his/her decisions to the problem, thereby, challenging him/her to a critical reflection. Drawing from these different background information (data and expert opinion and judgment) at hand and cognizant of the morally unique features of the case, the casuist using the value of prudence attempts to come up with the most appropriate solution to the case.

Richard Miller divides the casuist's methodology into five interrelated steps:[27]

1. Casuists attempt to classify the event in question, drawing on paradigms and taxonomies, frequently involving analogical reasoning;

2. Casuists identify which presumptions are relevant to the event;

3. Casuists comment on the case's circumstances and how these might affect our overall judgment of the event in question;

4. Casuists often reflect on the opinions of prior authorities as these might bear upon our moral assessment of the cases;

5. Casuists then render a verdict after bringing together the materials from the first four components.

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[26]James Keenan, "The Return," 129.

[27]Richard Miller, *Casuistry and Modern Ethics: a Poetics of Practical Reasoning,* Chicago: University of Chicago Press, 1996, 5, cited in Townsley, "Casuistry," 4.

Keenan holds that "casuistry is a rhetorical reasoning applied to moral matters."[28] He stresses how circumstances surrounding the case may reveal the unspoken biases and or unacknowledged presuppositions of those involved in the moral deliberation. It therefore, engages the reasoning of individuals and groups[29] and challenges them to correct their distorted views. As a form of rhetorical reasoning it identifies and addresses vital issues by (1) recognizing and raising appropriate questions as they 'issue' from the case (special topics); (2) narrowing the field of inquiry until the questions upon which the case 'hinges' come clearly into view (stasis and maxims); and (3) building lines of argument congruent with and derived from the analysis of the case by turning to the common topics."[30]

In all of these processes, we see that moral principles as affected by the vicissitude of history (context) and that they emerge out of practices and cases in society. Keenen maintains that casuists are cognizant of these realizations: "The casuists argue that their practices and solutions eventually articulate the principles; the principles do not solve the cases. Casuistry, when it pauses for a moment from practice and enters the world of theory, makes rules and principles."[31]

In sum, a casuist draws on previous experiences, employs procedures that have proved useful and fruitful in resolving earlier problems, harnesses them and reapply them in new problematic situations. In simplest terms, casuistry is practical problem solving tool that depends much on listening, comparing and dialoguing with other "voices" and "authorities." It opens to the present (unique situation of the present) but connects to the past (living memory and dynamic traditions of peoples and faith communities) for its dynamics.

Casuistry and Transformative Learning: Drawing Parallels

Both casuistry and transformative learning theory (TLT) hinge on some theoretical cornerstones. These are the following:

1. Both are constructivist in orientation. The emphasis lies on the active agency of learners/moral actors in negotiating contested

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[28]James Keenan, "The Return," 132.

[29]James Keenan, "The Return," 132-138.

[30]James Tallmon, "Casuistry," 2 in Thomas O. Sloane, *Encyclopedia of Rhetoric*, New York: Oxford University Press, 2001, at http://www.she-philosopher.com/library/tallmon.html, accessed on May 2009.

[31]James Keenan, "The Return," 136.

meanings (making and constructing meanings). Learners construct their own meanings and interpretations regarding their own experiences. Rather than relying simply on objective knowledge/principles/theories that is handed down from the past, learners and moral actors become artisans of their own meanings. "We interpret our experiences and the things we encounter in our own way, what we make of the world is a result of the perception of our experiences, argues Patricia Cranton."[32] Knowledge (moral/ethical) is not viewed as something out-there to be taken in by learners. Rather, "it arises within the social acts of trying to make sense of novel experiences in day-to-dayness of our lives."[33] Casuistry is allowing moral agents to make sense of their daily experiences by drawing from their experiences and the concrete experiences of people in their faith communities.

2. Casuistry and TLT consider critical reflection on experience as a key component of decision-making. Critical reflection is "the means by which we work through beliefs and assumptions, assessing their validity in the light of new experiences or knowledge, considering their sources, and examining their underlying premises."[34] A casuist learns critically from past experiences to have a critical handle of his new ethical/moral situation. As Keenan writes, ...casuistry helps its user to recognize the claims of circumstances, to examine long-held beliefs, to challenge existing principles, and to develop new guides."[35]

3. Both the casuist and transformative facilitator-learner hold that critical reflection pertains not only to the self but extends also to the community in the process of rational discourse or moral deliberation.[36] What is envisioned is a community of learners in critical dialogue with one another for pursuit of a more "justifiable" knowledge. "The casuist presents the morally relevant materials and becomes a 'decision facilitator' in collective practical reasoning, holds Keenan."[37] Stanley Hauerwas writes that casuistry is a "necessity because it

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[32]Patricia Cranton, *Understanding*, 26.

[33]John Dirkx, "Transformative Learning," 5.

[34]Patricia Cranton, "Teaching for Transformation," in *New Direction for Adults and Continuing Education* 93 (2002) 65, http://education.gsu.edu/ctl/FLC/Fondations/Transformational.pdf, accessed on October 2008

[35]James Keenan, "The Return," 138.

[36]See John Dirkx, "Transformative Learning and the Journey of Individuation," *ERIC Digest* no. 223 (2000) 1-2.

[37]James Keenan, "The Return," 133.

provides the means by which we learn to check our particular telling of the story of God with the way our community is."[38]

4. Casuistry and TLT are both contextual in their approaches. The approach is contextual firstly, in the recognition of socio-cultural/political contexts that affect moral decisions. Secondly, the recognition of the community of learner/moral agents in which the person is embedded. Casuistry, claims Hauerwas, is "…unintelligible as an activity separated from its communal context."[39]

5. Casuistry and TLT promote creativity in both the educator and the learner/moral agent as they venture in to a more experimental learning process. To "bring about the catalyst for transformation" Patricia Cranton proposes "to expose students to viewpoints that may be discrepant with their own. Films, documentaries, novels, short stories, and poems often portray unusual perspective in dramatic and interesting ways."[40] Casuistry engages the concrete realities of life rather than dry dogmatic formulation.

Consequently, as learning approaches casuistry and TLT imply the following shifts in learning strategies:[41]

1. From (ethical/moral) knowledge as set of information/objective truth ready for transmission/assimilation to a view of knowledge as a product of critical construction of meanings by moral agents;

2. From (ethical/moral) learners viewed as receptacles of propositional truths to learners as artisans of their own knowledge;

3. From teachers/guardian of morality viewed as font of knowledge (a sage on stage) to teachers viewed as informed guide/facilitator to seeking knowledge;

4. From a "controlled"/rigid learning environment to an empowering and non threatening learning environment;

5. From purely lecture type instructions to more experiential, creative, and productive/performance based activities.

Casuistry and Teaching Morality/Ethics to the Facebook Generation

The *facebook generation* (F generation) represents the youth of today who grew up in a world dominated by social networking sites and

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[38]Stanley Hauerwas, "Casuistry as a Narrative Art," *Interpretation* 37 (1993) 377-88, cited in James Keenan, "The Return," 132.

[39]Stanley Hauerwas, cited in Keenan, "The Return," 137.

[40]Patricia Cranton, *Teaching for*, 66.

[41]The following learning strategies are based from the De La Salle University document entitled "Towards a Lasallian Pedagogical Framework of Transformative Learning."

who express their self-identity mostly through the web. They are the highly digitized generation who dabble with new forms of technology and who are exposed to myriad forms of information brought about by the ICT (information communication technology) revolution of our global age. Many of our students in the university constitute the Facebook generation. They are the 21st century learners. The question then is, what can be the best way to teach ethics/morality with the F generation? The F generation and the novel issues they generate is an occasion to revive casuistry. A casuistic approach to teaching ethics/morality can be more convivial for them for the following reasons:[42]

1. Casuistry does not immediately focus on moral principles and theories but on practical/experiential moral dilemmas. Such being the case, it can be more engaging for the F generation who do not have the background and attention span to really deal with abstract moral theories. This is not to say that the youth of today are not capable of exploring moral/argumentations, rather experiential moral cases can elicit more interesting discussions from them because they are "fun" and connects with what is happening in life.

2. Casuistry focuses more on strategies for action rather than ethical principles. Ethics is really about the processes and skills of discernment vis-a-vis moral/ethical problems. It is knowing the appropriate course of action to take and the appropriate timing do act on the deliberated action. Hence, ethics is really about prudence and practical wisdom. What the F generation needs is the development of their skills of moral/ethical judgment rather than information overload about moral/ethical principles. For after all, they can always readily access the internet where a huge repository of information about ethical/moral principles can be found at their convenience.

3. Casuistry seeks patterns of action that can guide in one's moral judgment. Since the F generation reacts to moral impositions they would appreciate an approach to ethics/morality that can expose them to real-life situations and dilemmas (paradigm cases) and the

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[42]For this part, I have taken ideas from the article of Julian Bull and Ryan Newman entitled *Using Film Clips to Focus Ethical Dialogue: Teaching Ethics to the You-Tube Generation* (2008), http://www.episcopalschools.org/cmsUploads/public/Film Clips.doc., accessed on May 2009. See also Lawrence Chonko's Casuistry and Change Readiness: *Fundamental Aspect of Teaching Ethics in Marketing Decision Making* http://www3.uta.edu/faculty/lchonko/files/Casuistry%20Paper%20for%20MER%20-%20The%20Working%20Version.doc, accessed June 2009.

various ways in which one can provide actionable alternatives to the issue.

4. Casuistry communicates values through stories. The F generation does not appreciate much abstract formulations of ethical /moral principles. Generally, their attention span is short when it comes to purely speculative activities. Hence, stories/narratives are the best way to catch their attention.

5. Casuistry allows for critical discussions, recognition of conflict and negotiation, and consensus making, diversity, as well as charting alternatives. Teaching morality/ethics in an atmosphere of responsible freedom and dialogue will certainly appeal to the F generation. The F generation prides in diversity and openness.

Conclusion

What we have done so far is to demonstrate how casuistry as the art of seeking practical solutions to ethical/moral problems corresponds with the model of transformative learning we have indicated above. This correlation is apparent in how casuistry and transformative learning promotes consensus building, creating relevant taxonomy of information about the problem; the fusion of the present knowledge with the acquired/prior knowledge of students/moral agent; discussion and critical evaluation of relevant data and looking for patterns that can provide possible solutions to moral/ethical dilemma. We have also highlighted the fact that the life-world generated by the so-called facebook generation of students, who constitute our 21st century learners, is a fitting venue for casuistry to re-emerge.