

# Carolinas Communication Annual

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*Published by the Carolinas Communication Association*

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## CRITICAL ESSAYS AND RESEARCH REPORTS

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*The Calvin and Hobbes 10<sup>th</sup> Anniversary Collection* and Presidential Image Restoration**

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**Gender and Power:  
A Thematic Analysis of Senior Citizen Sexual Communication**

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## Editorial Policy (2014)

The *Carolinas Communication Annual*, the peer-reviewed, state/regional journal published by the Carolinas Communication Association (representing both North Carolina and South Carolina), accepts the submission of scholarly articles (both critical essays and research reports) on an ongoing basis. While articles by authors in the Carolinas and about topics relevant to the Carolinas and the surrounding region are certainly welcomed, the call is open to authors from around the country, and to a wide range of topics from multiple methodologies and perspectives within the larger Communication Studies disciplines. Furthermore, the journal is particularly interested in submissions regarding pedagogical ideas for our new GIFTS INC (Great Ideas for Teaching Students in the Carolinas) area. Those submissions should generally be modeled after activity essays published in *Communication Teacher*.

Critical essays and research reports should generally be no longer than 6000-7000 words in length and should follow the latest editions of MLA, Chicago, or APA style manuals. GIFTS INC essays should generally be no longer than 2000 words also utilizing a specific citation style. Authors should submit their essays electronically (in Word format) to the editor at [jmunsell@columbiasc.edu](mailto:jmunsell@columbiasc.edu) by May 9, 2014. Please include abstract, author identification information and correspondence information in a separate cover sheet or cover letter to ensure blind review.

Jason Brian Munsell, Editor  
*Carolinas Communication Annual*  
Communication Studies Program  
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## Editor's Letter

Dear Members and Readers,

I am pleased to present the 2013 volume of the *Carolinas Communication Annual*. This is my first year of a three year term; and never in my life have I gained so much respect for journal editors. This stuff is hard! I particularly appreciate the help of our former editor, Jason Black. His mentorship and support ensured a fairly smooth transition from his service to mine.

Part of my job as the new editor was to craft a new call and put together a new editorial board. One of the things I learned through this process is that folks easily agree to review, but only a few actually do it and do it well. I'm very thankful to the reviewers who did it and did it well and those are the names listed on the editorial board. Additionally, one thing I did differently in the call this year was to create a new section called GIFTS INC (or Great Ideas for Teaching Students in the Carolinas). I envisioned essays modeled after activity essays in *Communication Teacher*. I have found such essays very useful in my own pedagogy and I hope the inclusion of these essays will serve as useful pedagogical prompts for readers. I indeed called upon many of my closest colleagues in the Carolinas and elsewhere to serve on the review board given their specialties. I fear I didn't give my reviewers a great deal of turnaround time, but I was so pleased and honored with their hard work, professionalism and eagerness to provide excellent feedback to authors through what was a very rigorous blind review process; our rejection rate was quite high. Readers might also note the new look of the journal. I reformatted a few things and worked with Jacob Cook and Chris Cooper at Sun Printing to make our journal look more like other academic journals.

As with all of our volumes, this one is diverse and authors come from the Carolinas, but also throughout the country. Methodologies and approaches and topics are from all over the place. The first essay showcases a creative way to do rhetorical work on *apology*. I am very pleased that the author chose to submit to our annual; a previous rendition of this essay won the Top Paper Award in the Rhetoric and Public Address division at SSCA's 2011 conference. The second paper moves in a slightly different direction focusing on old people talking about sex; I love stuff like that. The third essay returns to rhetorical work on *apologia*, but centers on the Carolinas and the discourses of South Carolina governor Nikki Haley. There are two GIFTS INC essays. One showcases the use of what we can generally call experiential learning. While it is focused, I think readers will see how they could apply some of ideas to our own pedagogy. There is a final essay that discusses a pedagogical mission close to my own heart—teaching undergraduate research. In sum, I am very pleased with the quality and diversity of this volume of our annual and I hope readers find the works useful.

One final note of thanks to my colleagues at Columbia College. I'm particularly indebted to Angie White in our IT department for helping me with some formatting problems. I hope everything, after printed, is in good shape. Without staffing and a hired or even volunteer copy editor I did my best to catch all typos and generally ensure that essays were well written and conformed to stylistic standards. In the end, though, if readers see any errors whatsoever, let's just blame the authors please.

Sincerely,

Jason Brian Munsell  
Columbia, South Carolina  
September 2013

**Pre-emptive *Apologia* as Prebuttal:  
Contextual Reconstruction in  
*The Calvin and Hobbes 10<sup>th</sup> Anniversary Collection*  
and Presidential Image Restoration**

Shaun Treat

*This essay argues that Bill Watterson did indeed offer a rationale for the abrupt cancellation of his phenomenally popular strip within his previous treasury collection, The Calvin and Hobbes Tenth Anniversary Book, published only months before his announcement. Interesting from a rhetorical perspective is exactly how that rationale was offered and, I argue, may suggest a kind of covert “Pre-Emptive Apologia” which anticipates a future exigency. This paper examines Bill Watterson’s covert contextual reconstruction of a ceremonial exigency and how this tactic of “prebuttal” has become a common if ethically troubling image repair practice within the Rhetorical Presidency.*

The phenomenally popular cartoon strip *Calvin and Hobbes*, described by *Washington Post* writer Frank Ahrens as the “fresh and ingenious” comic that defined the 1980s (12/19/1995, F01), ended suddenly in December of 1995. Strikingly absent was any explanation for the abrupt demise of the strip, the only commentary a matter-of-fact statement distributed by Universal Press Syndicate on November 9 that artist Bill Watterson would be discontinuing *Calvin & Hobbes* on December 31 of that year. Watterson, the notoriously reclusive creator of the strip, issued no detailed justification to the press or fans regarding his decision aside from a terse note to his syndicate stating: “My interests have shifted, and I believe I’ve done what I can do within the constraints of daily deadlines and small panels. I am eager to work at a more thoughtful pace with fewer artistic compromises” (Associated Press, 11/10/95; *U. Magazine*, 3/96). This cryptic statement raised more questions than provided answers for fans, suggesting that Watterson felt unobligated to justify his decision to legions of loyal readers devastated by the abrupt bombshell. “Eliminating Calvin & Hobbes,” one woman lamented in a letter to *The Washington Post*, “is like taking the Louvre out of Paris, maybe even the Eiffel Tower” (1/6/2002, B06). Yet Watterson clearly, and oddly, failed to offer any explanatory *apologia* for this action. Or did he?

Shaun Treat is an assistant professor of rhetoric in the Department of Communication Studies at the University of North Texas. An earlier version of this essay received the “Top Paper Award” recognition in the Rhetoric and Public Address division at the 2011 Southern States Communication Association. The author is greatly indebted to the gracious critical feedback of generous reviewers. Correspondence to: Shaun Treat, Department of Communication Studies, 320A GAB, University of North Texas, Denton, TX, 76203-5268, USA. Email: [shauntreat@unt.edu](mailto:shauntreat@unt.edu)

It is the premise of this essay that Watterson did indeed offer a rationale for his decision within his previous treasury collection, The Calvin and Hobbes Tenth Anniversary Book (1995), published only months before his announcement that the strip would be discontinued. Interesting from a rhetorical perspective is exactly *how* that rationale was offered and, I contend, may suggest a kind of covert *Pre-Emptive Apologia* which anticipates a potential future exigency. This paper will examine how Bill Watterson's contextual reconstruction of a ceremonial exigency allowed him to give a detailed yet stealthy explanation of forces and factors that would lead to his later termination of *Calvin & Hobbes* at the height of the strip's popularity. Explored herein as a rhetorical homology for other instances of pre-emptive apologia (Brummett, 2009), Watterson's use of this tactic is examined as a rare but recurring rhetorical form with applications for the structural reconstruction (perhaps pre-construction) of other social and political contexts for scandal management via preemptive image restoration.

The Calvin and Hobbes Tenth Anniversary Book, which had already spent 13 weeks atop the *New York Times* bestseller list by the time the final strip hit the funny pages, proves to be a valuable rhetorical artifact since it may illustrate a rare brand of apologia. Plato, Isocrates, and Aristotle all considered *apologia* as a distinct rhetorical genre concerned with *ethos* wherein a rhetor defends oneself or another's actions against accusation (Ryan, 1998).<sup>1</sup> Benoit (1995) has offered his "Theory of Image Restoration or Repair" as a more systematic typology of apologia. One of Benoit's conclusions for deliberative public discourse is particularly compelling: we lack,

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<sup>1</sup> Some might suggest that because Watterson's Tenth Anniversary commentary is not a direct response to explicit accusations of wrongdoing, nor does he take a contrite stance in overtly defending his action, this instance therefore does not qualify as *apologia*. Such a criticism, however, is symptomatic of persistent indistinctions between apologia and "apology" as it is more commonly understood (Downey 1993). Tavuchis (1991) contends that the Greek root *apologos* (a story) as it influences both *apologyia* (a defense or speech in defense) and *apologia* (a written or oral defense) helps contextualize early invocations as: "(1) the pleading off of a charge or imputation, *whether expressed, implied, or only conceived as possible*; a defense of a person or vindication of an institution, etc. from accusation or aspersion; (2) Less formally: *Justification, explanation, or excuse of an incident or course of action*; (3) An explanation to one effected by a person's action that *no offense was intended*, coupled with an expression of regret for any that may have been given; or a frank acknowledgment of the offense with an expression of regret for it, by way of reparation" (15-16, emphasis mine). Especially within these broader understandings, even without expressed regret or remorse, Watterson's covert justification or rationale for an anticipated exigency of defense would seem to fit these classical definitional parameters of apologia which, as Downey (1993) shows, continues to evolve in both function and practice.

he says, "a thorough understanding of accusation, reproaches, or persuasive attacks."<sup>2</sup> Organized into five broad categories of apologia, Benoit's "Image Restoration Strategies" for image repair include denial, evading responsibility, reducing offensiveness, corrective action, and mortification. One subcategory of "evading responsibility" is Transcendence, in which an action is placed in a broader context and justified by directing an audience's attention to more haughty values at stake (Benoit, 1994, 1995; Blaney & Benoit, 2001). Yet the unique artifact I explore here exhibits two significant departures from the literature on apologia and image repair. First, although I will argue that Watterson's commentary indeed possesses characteristics of apologia by transcendence when considered in hindsight, his remarks are neither offered nor overtly framed as apologia but are instead subtly cloaked within a ceremonial exigency. Second, in addition to its lack of a clearly articulated justification for some action, Watterson's statements are made *prior to* his termination of the strip rather than offered after some exigence-inducing action has already taken place. Neither do Watterson's oblique comments in the Tenth Anniversary collection offer any indication or hint of his impending decision. For these reasons, I believe that pre-emptive apologia<sup>3</sup> may constitute a new anticipatory subset of apologia by transcendence that might also reflect some emergent trends within our contemporary landscape of mediated politics (Blair, 1984) and the "Rhetorical Presidency" (Tulis, 1987). Thus, the conclusion of this article will consider Watterson's rhetorical strategy as providing fresh insight and critical utility for contemporary mass-mediated political discourse that exhibits features similar to his pre-emptive apologia, or what is now commonly referred to in public relations and political scandal management as a *prebuttal*.<sup>4</sup> In the following homological criticism, this

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2 Of Image Restoration, Benoit (1995) indeed acknowledges, "the strategies outlined here may work just as well as preemptive apologia, in which the rhetor attempts to diffuse anticipated criticism. Here, the defense would occur before the attack, complicating the relationship between *kategoria* and *apologia*. Indeed, if a preemptive defense were completely successful, no attack would occur" (85). Thus, Image Restoration would most often deny that the accused performed the act or reduce the apparent offensiveness of the act (86). After he examines Nixon's 1970 speech announcing the U.S. offensive into Cambodia as a failure of "anticipatory image restoration," Benoit concedes that "so far, research on image restoration has not focused on preemptive self-defense" (146).

3 Mueller (2004) offers an analysis of "preemptive apologia" that ultimately argues for the ineffectiveness of preemptive apologia in his case study, whereas this study invokes several illustrative examples to instead contend that pre-emptive apologia is not only effective in the case of Watterson specifically, but has evolved into a tactic for "prebuttal" of criticism or accusation in both presidential rhetoric and public relations strategy (Safire, 2005). Thus, "pre-emptive apologia" at least since the Clinton administration has become a standard rhetorical strategy for effectively deflecting or misdirecting scandal or controversy as anticipatory political image repair.

4 For more on prebuttal, see: Ronald D. Smith (2002, p. 98); and Elizabeth Knowles, "Prebuttal," in The Oxford Dictionary of Phrase and Fable (2006). As explained by *Encyclopedia.com*: "Prebuttal in politics, a  
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retorical analysis will first examine the pre-emptive apologia of Watterson as offering a covert justification for his abrupt termination of his beloved cartoon strip, but then the essay will extend this homology to the tactical and ethical implications for the contemporary trend of anticipatory political image-repair via prebuttal.

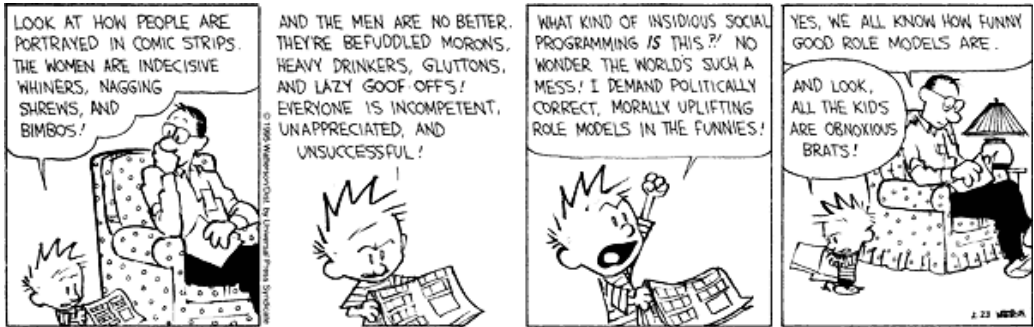


Figure 1: Watterson’s strip often offers satiric glimpses of his frustrations with the comics industry. **CALVIN AND HOBBS © 1993 Watterson. Used by permission of Universal Uclick. All rights reserved.**

## I. MARKING THE TENTH ANNIVERSARY OF *CALVIN & HOBBS*

An anniversary affords opportunity to reflect upon past achievement, even as it also extends a praiseworthy (or perhaps blameworthy) tribute to a meaningful present for future audiences. “The true measure of art intended for children is whether it resonates on a deeper level when you interpret it as an adult,” opines biographer Martell (2009); “Looking back on *Calvin and Hobbes* now, I would, without hyperbole or doubt, say that Bill Watterson is the most brilliant pop artist of the late twentieth century” (3-4). Gary Trudeau, longtime *Calvin & Hobbes* fan and creator of *Doonesbury*, noted that Watterson’s strip “got the reporting right” and drew childhood “as it actually is” (*The Washington Post*, 3/15/97: D09). While *Calvin & Hobbes* is still celebrated as a household name, its creator Watterson is another matter entirely. “Researching Watterson is like shadowing Thomas Pynchon, or teasing out the ‘real’ author of the Shakespeare plays,” grouses Alex Beam (1995) of *The Boston Globe*. Biographical details of the stubbornly reclusive artist, Beam wryly notes, demonstrate “hedging worthy of a country manor”: into his 50s by now, married with cats, has 3 children or no children (depending on which unauthorized biography you believe), fiercely private, and infamously camera-shy (33). Since the first *Calvin & Hobbes* strip appeared in November of 1985, Watterson won two



Reuben Awards (in '86 and '88) for outstanding cartoonist but has stubbornly resisted interviews with few exceptions. "I'm very happy that people enjoy the strip and have become devoted to it," Watterson said in a rare and reluctant 1987 interview with *The Los Angeles Times*; "But it seems that with a lot of the marketing stuff, the incentive is just to cash in" with a disregard for "understanding what makes the strip work" (Dean, 1987). Interestingly, the rookie phenom twice refused to accept the National Cartoonists Society "Outstanding Cartoonist of the Year" award and, at a 1990 cartoonists' symposium at Ohio University, the "prickly Watterson ripped into colleagues" for work that is "poorly drawn," containing "the simplest interchangeable gags and puns [that are] written by committee and drawn by assistants," but producing "little more than advertisements for dolls and greeting cards" (Carroll, 1995: C1). Popularity of his strip nonetheless skyrocketed and *Calvin & Hobbes* was soon appearing in 2,400 newspapers while each of his 14 compilation books of the strip sold a million copies in their first year and 23 million copies still remain in print, all despite Watterson's obstinate refusal to go on promotional book tours. *The Calvin & Hobbes Tenth Anniversary Book* provides the elusive Watterson's "most in-depth discussion" of his wildly popular comic strip and, says managing editor Dorothy O'Brian of publisher Andrews and McMeel, it was "a very personal expression for him, because he doesn't give interviews" (*Omaha World Herald*, 10/24/95: 31). The 1995 anniversary treasury hit bookstores a guaranteed bestseller only a few months prior to Watterson's abrupt announcement that he would discontinue the daily strip at the end of the year.

In marking the notable tenth anniversary milestone of *Calvin & Hobbes* and its impressive success, one would certainly expect the trappings of a ceremonial address. Edwin Black (1994) outlines some of the conventional expectations and generic functions of a ceremonial public speech, which offer helpful contrasts with the published written remarks of Watterson. Black points out that "the words that are spoken at ceremonial transitions work to fix and consign an event, to articulate a common interpretation of it, so to fashion a public memory of it that can hardly thereafter be remembered in any other way" (29). Because the information conveyed in a ceremonial speech aims at creating a consensus, Black posits that the information presented is not new since it instead functions "to dress an occasion in a socially necessary integument of words and, by remarking it, to mark it as remarkable" (p. 29). Although there are times when silence is tributary, Black argues there are also situations when silence is contemptuous and words must be spoken. In short, Ceremonial address looks to the past and attempts to rhetorically shape collective interpretation of it for the present and into the future.

Watterson's lengthy commentary in the Tenth Anniversary Book clearly attempts to construct a retrospective interpretation of *Calvin & Hobbes* within this ceremonial exigency, but it departs from Black's formula by utilizing *new* information (and copious personal perspective) previously unknown to fans. This inclusion would seem to indicate more at work rhetorically than a mere ceremonial address, thus cuing rhetorical critics that the anniversary may well be a “rhetorical hybrid” strategically bending genre conventions for other purposes (Jamieson and Campbell, 1982). The function of a ceremonial speech—to build a consensual interpretation of past events—can thus be viewed as a strategic rhetorical opportunity, one that may allow a rhetor to address other issues through her/his examination of past events toward the creation of public consensus. Following Vatz (1973), Branham and Pearce (1985) point out that not all texts are conventional, not all contexts are stable, and not all situations imply recognizable techniques or consensual standards of interpretation. Many texts and contexts, and thus rhetorical situations, are thus mutually co-constitutive.

Every communicative act is a text that derives meaning from the context of expectations and constraints in which it is experienced. At the same time, contexts are defined, invoked, and altered by texts. Particular communicative acts simultaneously depend upon and reconstruct existing contexts. (19)

The authors are particularly intrigued by "those texts which change the context in which they occur to one in which they might 'fit'... termed *contextual reconstruction*" (p. 19). Branham and Pearce argue that in order to reconstruct contexts, "many texts provide internal portraits of themselves, their creators, their audiences, and their situations" (31). Self-reference can therefore function to transcend and reshape the situation in which it occurs, which modifies consciousness and organizes new modes of sensibility within an audience (33). Ceremonial address could therefore afford an epideictic opportunity to strategically reconstruct understandings of the past and, thus, rhetorically (re)frame future assessments and audience attitudes with a potentially covert Constitutive Rhetoric (Charland, 1987).

The idea of contextual reconstruction provides valuable insight into the departures made by Watterson in his ceremonial address. He does indeed make extensive use of self-reference in his commentary, spending a majority of his time describing and explaining his creative process for creating *Calvin & Hobbes*. Readers are taken behind the scenes by Watterson, learning about the tedious and frustrating obstacles endured by him as a matter of occupational hazard. Watterson offers readers his own perspective, and thereby invites his audience to share his viewpoint of a very personal artistic process. As he moves through the several short sections of insights within the introduction, Watterson provides glimpses into his personal beliefs and values

that may ultimately serve a decidedly different rhetorical function than that of mere ceremonial exhortation. We will therefore explore these sections in order of appearance as Watterson develops them in this collection: “Comics in Transition”; “Licensing” and “Sabbaticals”; then finally the volume’s postscript, “Cartooning and Calvin & Hobbes.”

One particularly fascinating aspect of Watterson's commentary is the contexts in which he frames the several parts of the introduction to the *Calvin & Hobbes Tenth Anniversary Book*. Watterson begins his introduction to the treasury with a section entitled "Comics in Transition," providing a history of the comic medium and finding comics currently in a period of significant creative flux. This transition is described as: 1) beginning a rare generation shift, since new talents are bringing along different ideas about what cartooning should be; 2) the evolution of artistic interpretation, cartoonists now regarding creations as personal expressions while also questioning old assumptions about how the business of cartooning is done; and 3) changes in the newspaper business itself, which often brings comic creators into conflict with their one-time print patrons of the national syndicates. These changes lead Watterson to editorialize:

Because of all these developments, the traditional relationship between cartoonist, syndicate, and newspaper has been strained. As circumstances change, each party tries to protect its own interests. Newspapers are trimming costs by cutting space and features. Syndicates respond by diversifying into licensing and publishing. The top cartoonists are demanding greater control over their work, and some are leaving the business altogether. With fewer common goals and needs, there is less trust and cooperation. (8)

Watterson laments that comics have lost the variety that once made them great, and that the standard of artistic craftsmanship in comics has suffered as a result. Immediately we find that Watterson seems to be attempting much more than the expected ceremonial celebration of *Calvin & Hobbes*. Through the process of contextual reconstruction, Watterson is placing himself squarely within the epic tension between comics as an art form and cartooning as big business.

By placing himself and his art within the larger issues of newspaper sales and product merchandising, Watterson is also (re)creating a new context within which we may understand his beloved strip, *Calvin & Hobbes*. Watterson’s next discussion in a section entitled “Licensing” examines the creative tensions and shameless commercialism that problematize cartoons as an art form. Although merchandising plush toys and t-shirts or lunch-boxes can easily turn a popular strip into a financial gold mine, Watterson clearly feels this also cheapens the original creation. Merchandising rarely respects how a comic strip works, Watterson explains, since comic strips can have a point of view and serious purpose behind their punch-lines, which also carries a

“responsibility to think beyond satisfying the market’s every whim and desire” (11). When cartoonists license their characters as products, he worries their voice becomes co-opted by the commercial concerns of toy manufacturers, television producers, and advertising agencies. With “truckloads of money” at stake, Watterson describes arguments with his syndication agencies as increasingly vicious over the years to a point where he admits, “I am probably the only cartoonist to resent the popularity of his own strip” (12). After bitterly warring with Universal Press Syndicate over the issue of merchandising for five years, Watterson admits he was prepared to quit: “If I could not control what *Calvin & Hobbes* stood for, the strip was worthless to me” (12). Universal Syndicate agreed to instead renegotiate his contract, however, and Watterson regained ownership of the licensing rights to his characters then took some time off. Watterson has steadfastly refused to license his characters for any form of commercial exploitation.

In the next section on “Sabbaticals,” Watterson tells how he was exhausted and disgusted after the licensing battle with Universal Press. Explaining that lengthy sabbaticals result in reruns of past strips, Watterson is clear that he finds this practice unfair to both newspapers and loyal readers. Subsequent sections go into exhaustive technical detail on the rigid Sunday formats for strips, which he used his newfound clout to defy by mandating space requirements, before Watterson turns to the cartoons and creative influences that shaped his own cast of characters. Here Watterson gives readers further insight into his own artistic vision and the creative evolution of the strip, particularly how *Calvin & Hobbes* has tried to exemplify what he envisions the medium of comics as capable of accomplishing both creatively and artistically.

These introductory sections of his compilation are seemingly offered by Watterson to explain or contextualize his struggles and convictions regarding comic strips as a personal art form and as a business enterprise. Readers are introduced to the idea that the tawdry business of merchandising corrupts what Watterson feels is the artistic integrity of comics. “When everything fun and magical is turned into something for sale, the strip’s world is diminished,” opines Watterson; “I went into cartooning to draw cartoons, not run a corporate empire.” Columnist Alex Beam (1995) notes: “That comment is a thinly veiled gibe, directed at his many colleagues who employ surrogate writers and inkers to churn out greeting cards, lunchboxes, and delivers comic kitsch.” Readers of *The Tenth Anniversary Book* are also introduced to Watterson’s detailed personal reservations about *Calvin & Hobbes*, and the strips difficult transition from a very personal form of artistic expression into a commercial juggernaut of corporate exploitation. The retrospective of strips that dominate *The Tenth Anniversary Book* come with running commentary by Watterson, many of which reflect and reinforce these very

same themes. As the bulk of the book, these collected comic strips lead to a rather odd conclusion that bookends – and extend – his opening remarks.

In the conclusion of the book, a postscript commentary titled “Cartooning and Calvin & Hobbes,” Watterson returns to themes raised in his introduction to more broadly relate *Calvin & Hobbes* to what he views as the limitless potential of comics as art. “As frustrated as I am by the way this business works,” Watterson explains, “I continue to believe that comics are an art form capable of any level of beauty, intelligence, and sophistication” (207). Reflecting on how *Calvin & Hobbes* has evolved, Watterson also expresses difficulty keeping “the strip’s world energized and expansive year after year” since “its frightening how fast stories and situations become predictable” as “stale formula” (207). “Lately,” Watterson admits, “I’ve had trouble writing extended narratives that satisfy me, and I’ve been doing fewer of them” (207). *Calvin & Hobbes* seems a Frankenstein monster that has taken on a life of its own, so much so that Watterson confesses, “I don’t control where it goes” (207). If this leaves the impression that the strip is running out of gas, Watterson offers no sense of public duty to millions of fans that might necessitate his sacrificing quality to cash-in on lucrative public sentiment:

I’m flattered when people respond to my work, but I don’t feel accountable to public demand. Trying to please people encourages calculation, and the strip is valuable to me only insofar as it is honest and sincere... Sometimes I resent the pressure to exploit every waking moment for strip ideas, but at its best, the strip makes me examine events and live more thoughtfully. I love the solitude of this work and the opportunity to work with ideas that interest me. This is the greatest reward of cartooning for me. (207-8)

It’s interesting to note Watterson’s shifting tenses between past, present, and future, particularly because his epideictic invocation of past facts and present values seems to cast doubt upon any meaningful future certainty. The structure of these commentary sections, as we can now see, narrate a past of significant transitions within the comics industry, sketch a long present filled with Watterson’s creative differences over licensing and punctuated by leaves of absence, but then the volume concludes with a surprising existential melancholy when contemplating the future for “Cartooning and Calvin & Hobbes.” As it turns out, the future of the strip was perhaps far more *fait accompli* than Watterson was overtly admitting.

## II. WATTERSON’S RHETORIC OF PRE-EMPTIVE APOLOGIA

Viewing Watterson’s commentary in the context of a purely ceremonial address yields an unsatisfying explanation of what Watterson is rhetorically attempting to accomplish. While Watterson’s comments certainly serve a ceremonial function in marking the strip’s tenth

anniversary, the utilization of new information and perplexingly detailed personal insights would seem to suggest other motives at work. At the very least, Watterson seems to be offering a barbed critique of the cartooning industry, even as he launches an earnest invective for respecting and nurturing cartooning as an art form. Examining Watterson's address in terms of contextual reconstruction opens up new possibilities by suggesting that Watterson may be refiguring the ceremonial exigency to address other unstated rhetorical goals, whether strategic or unconscious (Gunn and Treat, 2005). The tactic of narrative self-reference allows Watterson to transcend and reshape the context of this treasury collection, but other rhetorical goals within this text remain either covert or unknown. At best, understood only within the immediate situation, Watterson outlines his own high expectations and artistic standards, despite the admittedly harsh realities of the cartooning business. Contextual reconstruction is also somewhat inadequate here, since recognizing the earmarks of contextual reconstruction does not answer "reconstructed into what?" Branham and Pearse additionally seem to presume that the reconstructed context rests squarely in the present or past. The context which Watterson reconstructs, I argue, may instead be one which has yet to be realized – some unacknowledged rhetorical exigency in the future.

I contend that Watterson's commentary may best be understood as a *pre-emptive apologia*, a rhetorical reconstructive narrative of past events and current conditions which functions to explain, frame, or justify some future action, event, or context with a proactive strategy for justification rather than a reactive response of defense. Watterson meticulously outlines the creative potential for cartoons as an art form, but also explains how he finds capitalistic interests sadly stunt the realization of creative expression and artistic potential. Lee Salem, editorial director of Universal Press Syndicate, admits that Watterson "has a very highly defined aesthetic that seems a little out of place in the '90s, and has a business prospective that is alien." How alien? Watterson's cranky refusal to license merchandising of his popular characters has meant turning his back, conservatively, on \$10 million a year! Gawks Jerry Carroll (1995) of *The San Francisco Chronicle*: "Do the math yourself—that's roughly \$100 million he could have pocketed but didn't because of his scruples" during the strip's 10 year run (C1). By placing himself and his strip within the epic struggle between artistic integrity and business profiteering, Watterson demonstrates the transcendent principles and personal motivations that guide his handling of *Calvin & Hobbes*. "On occasion, I've ripped up entire stories—weeks worth of material- that I didn't think were good," Watterson admits; "I weed out as much mediocre work as possible" (20). Watterson's own high expectations and artistic integrity are put on display, and he obviously refuses to compromise these lofty principles. The

profit-driven business of cartooning, Watterson repeatedly implies, too often prostitutes an art form and diminishes his own artistic self-satisfaction. Having just returned from a 9 month sabbatical in January of 1995 only to announce his self-cancellation of the strip that following November, Watterson seems to have prepared his commentary in the Tenth Anniversary collection in partial anticipation if not total awareness of his future decision.

The rhetorical value of pre-emptive apologia is that this tactic places matters of transcendent principle in a position of paramount importance, recontextualizing issues with a moralizing dimension of personal integrity or moral responsibility without having to address tedious specifics of an anticipated exigence. Watterson's intolerance for artistic mediocrity and creative compromise is starkly contrasted with the personal rewards he receives from cartooning, rewards which the popularity and pressures of *Calvin & Hobbes* seem to actively diminish. Trying to please popular audiences and fend off corporate profiteers clearly infringes upon Watterson's perceived control of his strip. The strip's popularity also threatens Watterson's highly valued anonymity and solitude, even as it increases the number of people who seek to second-guess or influence the destiny of *Calvin & Hobbes*. Newspapers control the format, Universal Syndicate owns rights to the characters as intellectual property, and Watterson's ability to explore the art form is hampered by format restrictions and the demanding expectations of fans. Watterson wryly admits "the permanence of familiar strips and the lack of change within the strips account for much of their popularity" (7). In essence, the more popular Calvin & Hobbes had become, the less rewarding it became for Watterson. By detailing his own intrinsic needs and rewards and how they are rarely being met, however, Watterson is in hindsight offering a clear picture of his reasons for terminating *Calvin & Hobbes*. Although he never alludes to the possibility, Watterson is in retrospect obviously offering his rationale for discontinuing the strip rather than sacrifice his high standards for quality and suffer a job that has grown creatively and personally unfulfilling. Indeed, in a commentary accompanying a retrospective of his art at Ohio State University and almost six years after *Calvin & Hobbes* rode their wagon into the sunset for the last time, Watterson admitted publicly that his decision to quit the strip "was long anticipated on my part" (*The Columbus Dispatch*, 9/6/2001). Within *The Tenth Anniversary Book*, now understood as a covert pre-emptive apologia, the contextual and situational forces behind a future decision are outlined and explained in advance, while the potential future action is neither suggested nor revealed. A controversial rhetorical agenda is thereby kept secret or hidden from public scrutiny by emphasizing transcendent ideals or principles.

Because this rhetorical strategy pre-empts debate or discussion regarding decisions or actions, pre-emptive apologia contains danger alongside its obvious utility, especially when it disregards any democratic or communitarian responsibility to public dialogue. By shifting the ethical dimension away from the decision-maker, and instead portraying such action as unavoidable given a situational climate and value context, personal responsibility can be denied even as blame is shifted scenically to other people or outside factors. Transcendent apologia claims the moral high ground is being taken even as it potentially ignores, disguises, or denies alternative perspectives and motivations, or marginalizes the concerns of some critical audiences (Towner, 2010). “Bill [Watterson] is both refreshingly different and exasperatingly different, depending on one’s perspective,” admits Lee Salem, editorial director of Universal Press syndicate (Carroll, 1995); “He’s candid to the point of irritation... I check my blood pressure after some conversations, and I’m sure he feels the same way about us.” Frank Ahrens of *The Washington Post* confirms that “Watterson is notoriously cranky, famously reclusive, ludicrously difficult” while *The Calvin & Hobbes Tenth Anniversary Book* “includes position papers by Watterson—most of which read like terse, defensive polemics” (1995, F01). Little wonder, then, that the scandalously private Watterson in no way welcomes questions or second-guessing, much less debate, when it comes to his decision to cancel the strip. As Ahrens suggests, “what is missing is the joy,” since in retrospect *The Tenth Anniversary Book* indeed pre-empts discussion by covertly offering Watterson’s definitive word on the matter. In 2005, *The Complete Calvin & Hobbes* was released with a 13-page introduction by Watterson, but it offered little new information (Astor, 2005). As Watterson dryly responded in a Q&A with selected fan inquiries for an Andrews McMeel press release publicizing the 2005 collection, “My impression is that those who don’t get it, don’t care to get it.”<sup>5</sup> Rather than conveying the callous disregard of a reclusive aesthete, however, the simple fact that Watterson never *really* apologized for disappointing legions of admiring readers may instead suggest that he feels that an ample explanation has somehow already been offered to those who “get it.” For faithful fans, *The Tenth Anniversary Collection* offers precisely that.

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<sup>5</sup> The Q&A was included in *The Complete Calvin & Hobbes* (Andrews McMeel Publishing, 2005). A transcript can be found at: [http://www.andrewsmcmeel.com/calvinandhobbes/interview\\_text.html](http://www.andrewsmcmeel.com/calvinandhobbes/interview_text.html).





Figure 2: Watterson's dry and self-deprecating jabs at popular perceptions of comic art sometimes appeared as in-jokes for his strips. **CALVIN AND HOBBS © 1993 Watterson. Used by permission of Universal Uclick. All rights reserved.**

### III. PRE-EMPTIVE APOLOGIA AND POLITICAL PREBUTTAL

Yet this strategy of Pre-Emptive Apologia may not be restricted to the funny pages; it may also be a strategy emerging in the headlines of American political discourse.<sup>6</sup> The notion that rhetors might launch a pre-emptive strike in anticipation of a future exigency of attack would seem equally applicable to some emerging trends in political crisis strategy during scandal (Downey, 1993; Blaney and Benoit, 2001). To defer full explanations or justification to past sound-bites, or even apologize in advance for potential offense or argumentative inadequacy that is expected to follow some account, is a rather everyday occurrence to those familiar with social media. Similarly, received conventional wisdom for handling scandalous allegations is to vaguely offer a tersely hedging sound-bite to ward off 24-hour news cycles that might serve to pre-empt later scrutiny by flatly insisting at some future point in time that the controversy has already been adequately addressed, reckoned with, or is even perhaps irrelevant given some new contextual circumstances.

Indeed, then-presidential candidate William Jefferson Clinton told reporters during the 1992 New Hampshire primaries that Gennifer Flowers' accusations of a 12-year affair with him "did not happen" and rebuffed it as old smears. "The allegation is false," he insisted in a calculated appearance before the public on *60 Minutes* following the January 1992 Super Bowl,

6 Edward P.J. Corbett notes in the introduction of Ryan's (1988) book: "The *kategoria* usually occurs first and prompts the *apologia*. Although there have been some instances of *kategoria* that did not prompt an apologetic response, I do not know of a single instance where the *apologia* occurred first" (p.x). In a later examination of George Washington's inaugural address, however, Ryan (2001) does indeed identify elements of "a pre-emptive *apologia*, for the address presented a *fait accompli* as it precluded Congress or the people from asking him to change his mind" (4). As covert justification for a *fait accompli* future action, Ryan here suggests a key characteristic.

“I’ve said that before, and so has she.” Clinton suggested that “she changed her story” for money but, pressed by journalist Steve Kroft to flatly assert that he has never had an extramarital affair, Clinton shot back:

“You go back and listen to what I’ve said. You know, I have acknowledged wrongdoing. I have acknowledged causing pain in my marriage. I have said things to you tonight and to the American people from the beginning that no American politician ever has... Now, no matter what I say, to pretend that the press will then let this die, then we are kidding ourselves. I mean, you know, this has become a virtual cottage industry. The only way to put it behind us, I think, is for all of us to agree that this guy has told us about all we need to know. Anybody who is listening gets the drift of it and let’s go on and get back to the real problems of this country.” (Kroft, 1992)

This pro-active strategy largely worked, and then-Governor Clinton dubbed himself “The Comeback Kid.” The same consistently hazy response was later used by Clinton to fend off the “private issues” of marijuana use or military service and even other sex allegations by Paula Jones and Monica Lewinski. In hindsight, grouses David Savage of *The Los Angeles Times*, “he appeared to give denials that later turned out to be shading the truth” (1/24/98, A18). Clinton “told so many stories, crafted so many evasive answers, came up with so many lame excuses that he gave everybody a headache,” groans Bob Herbert of *The New York Times*, “and the story went away” (8/17/98, A15).

The strategy of savvy politicians quickly publicizing unflattering news about themselves to preempt scandal has been a public relations practice perhaps since Watergate, but the Clinton administration pioneered it as a new spin strategy of what has come to be called *prebuttal* (Smith 2002; Safire, 2005).<sup>7</sup> “The Clinton White House has refined a time-honored tactic of what it calls ‘scandal management’ – the preemptive release of damaging information about itself to rob congressional Republicans of the satisfaction,” explains reporter John Mintz (1997) of *The Washington Post*. Whenever further pressed regarding questions about Flowers, in what would become a recurring strategy for scandalous allegations during his presidency, Clinton would only tersely respond that “her story is not true... I’ve said it repeatedly, I have nothing else to say.” This tactic allowed Clinton’s staff to get in front of allegations with positive spin while the subsequent scrutiny of Republicans and the media, crows DNC spokesman Steve Langdon to Mintz, “have the suspense of a network rerun, and the tedium of a calculus lecture” (Mintz,

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<sup>7</sup> Hood and Rothstein (2001) integrate the concept of “prebuttal” as part of their schemas for “blame prevention re-engineering” in risk regulation regimes after the term gained currency as a tactical strategy coined by Al Gore during the 1996 Clinton presidential re-election campaign. Observes political columnist William Safire (2005), “We are now in the political era of the prebuttal.” Also see: Dan Balz, “Team GOP’ Tunes Up Message Machinery,” *The Washington Post*, 26 May 1996.

1997). That is, further explanation was pre-empted by Clinton's insistence that previous statements remain adequate and sufficient. Clinton's shifting "progressive apologia" strategies (Kramer and Olson, 2009) proved effective, at least for a time.

As previously established regarding preemptive apologia, one pressing ethical dilemma is that pre-empting further scrutiny and debate via some transcendent principle at stake can be used for purposes that are in hindsight deceptive, dishonest, or at least strategically evasive.<sup>8</sup> Calling Clinton "a master politician" able to soft-shoe "evasive answers," Savage complains that "neither the press nor the public can require a politician to be absolutely honest about all matters, particularly personal ones" (*Los Angeles Times*, 1/24/98). Clinton was indeed caught with his proverbial pants down with under-oath misstatements regarding his relationship with intern Monica Lewinski, but George W. Bush would soon use the precise same refrain when confronted with a very Clinton-like problem of past cocaine use. Ben Macintyre of *The Times* in London calls it "a question that has dogged his presidential campaign," which Bush allotted only the haziest sound-bite answers. "Over 20 years ago, I did some things," Bush vaguely admitted, "I made some mistakes and I learned from those" but then tersely insisted, "That's all I intend to talk about." Indeed, subsequent requests for elaboration continue to be deferred to the supposedly adequate sound-bites of the past. When heckled on a drug prevention tour by a protestor to quit feeding the frenzy and "just answer the question once and for all," Bush snapped that such rumor-mongering is "the game in American politics and I refuse to play it." Yet Macintyre observes that Bush "has danced around the question ever since his first run for Governor" and his dance steps have only "changed subtly since 1994" (*The Times*, 8/20/99). Clinton and Bush similarly claimed to be taking the higher moral ground, protecting their personal right to privacy for past indiscretions now being used as smear tactics by unscrupulous political rivals. For Bill Clinton, it meant public humiliation and near-impeachment when caught in a lie. But for George Bush, who ran on the platform that he would bring integrity back to the oval office, it sounded doubly hypocritical to not only face similar accusations but to also reply with the identical same excuses for dodging questions regarding past indiscretions. Odd that what had been a character issue for Clinton was now an unscrupulous partisan attack on a private

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<sup>8</sup> Dan Hahn (2003) convincingly argues that because politics requires the savvy deployment of "strategic language," such strategic ambiguity is as politically necessary as it is inevitable and misunderstood. Hahn notes that "not all 'political lies' are clearly lies. Some are language choices with which we disagree, some are recognizable simplifications, some are abstractions which we previously misunderstood, and some are pragmatic language" (96). "While the language choices described in this chapter are not new phenomena," he nonetheless concludes of these frequent substitutes for genuine public deliberation, "it does seem

issue for Bush when the tables were turned.

This trend of political prebttal, although a decidedly effective short-term rhetorical strategy, nevertheless holds dark potential for subverting both democratic process and principles within an increasingly preemptive “Rhetorical Presidency”.<sup>9</sup> In his videotaped 5 hour deposition to the Starr jury, Clinton reluctantly admitted that “my silence about this matter gave a false impression” and thereby attracted justifiable rhetorical scrutiny even as Republicans and conservative media pundits predictably smirked that this had been Clinton’s intent all along (Blaney and Benoit, 2001). Yet Bush similarly refused to discuss accusations that he covered-up a felony arrest for cocaine in 1972, while skirting a flat denial about past cocaine use (*The Dallas Morning News*, 10/21/99). Bush used similar tactics in also evading definitive denials about being AWOL from military service and his questionable business ventures. Pre-empting questions and discussion or explanation by claiming that they have already been adequately addressed, that one has said all they are going to say on what they deem old smears or a private issue, shows blatant disregard for the responsibility of elected public officials to be accountable to both their constituencies and their own stated values in light of past actions or evasions. The burden of responsibility is shifted from the person holding an office of public trust to a citizenry and press whose line of questioning is increasingly circumvented. The inherent hypocrisy in such a tactic, Ben Macintyre concisely observes, is precisely this:

[Bush is] defining his refusal to be specific as a defense of personal privacy and a rejection of what he calls “trash-mouth politics” and plotted rumour-mongering by his enemies. Yet that stance conflicts with his willingness to talk about other, more laudable, aspects of his past private life, such as his decision to give up alcohol and his faithful relationship with his wife throughout their 20-year marriage. (*The Times*, 8/20/99)

Pre-emptive prebttal, in other words, may be unscrupulously used to selectively rationalize what amounts to retroactive nondisclosure. This selective exposure to one’s personal history as a prebttal strategy of rhetorical reconstruction, with both Clinton and Bush, only works alongside some gesture of pre-emptive apologia that restricts information to only that which is flattering.

Contrary to Mueller’s (2004) analysis, I’ve suggested that political uses of preemptive apologia have proven to be both historically persistent and effective, at least in the political

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reasonable to hypothesize that they are newly dangerous” (113).

<sup>9</sup> Tulich (1987) surveys the evolving “Rhetorical Presidency” to identify troubling trends towards the “preemption of the deliberative process” with mediated agenda-setting and presumptions of the Unitary Executive model, thus foreshadowing Agamben’s ‘State of Exception’ when he insists that one persistent partisan “danger from the routinization of crisis is that the political system loses its ability to govern well between emergencies” (21-22).

short-term, as borne out most recently by the Bush administration's misleading rhetoric justifying pre-emptive war with Iraq.<sup>10</sup> President Bush and his top aides publicly made at least 935 false statements about the security risk posed by Iraq in the two years following the tragic events of 9/11 in 2001, according to a 2008 study by two nonprofit journalism groups.<sup>1</sup> Numerous books and former Bush-loyalists have since documented that the decision of NeoCons in the Bush administration to invade Iraq was made long before the profoundly flawed case for preemptive war was presented to the American public, deploying cherry-picked unsubstantiated raw intelligence to preempt debate and critical scrutiny.<sup>2</sup> "Looking back, the major landmarks of the past year appear to have been carefully designed to leave no alternative but war with Iraq – or an unlikely capitulation and abdication by Hussein," columnist David Broder wrote on the eve of the war (*Washington Post*, 18 March 2003). The costs of such evidentiary deck-stacking by the Bush administration, however, have been devastatingly toxic to democratic deliberation and political decision-making processes (Kellner, 2004; 2005). "There is much work remaining for ethical critics of Presidential discourse," rhetorical ethicists Aune and Medhurst (2008) insist, "describing who our presidents make themselves in their discourse and what kinds of listeners they create—what kind of people they call us to be" (326). "Significantly, voters cannot make informed decisions in a democracy unless they have access to information," they note, and while "(j)udging the credibility of information is critical to success in decision-making," this task is greatly problematized when "information is a commodity" more often consumed than rigorously questioned (328). In sum, the Bush administration's cynical reliance upon the strategic misrepresentation of cherry-picked intelligence via *prebuttal* reveals a dangerous trend in the political rhetoric of the Rhetorical Presidency, following the prior Clinton team's strategic misrepresentations, a strategic pattern which thus politically preempts debate rather than facilitates informed decision-making by policy-makers and citizen-publics (Winkler, 2007).

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10 Particularly relevant to considerations of preemptive justifications for a *fait accompli* policy would be the *Rhetoric and Public Affairs* (10.2, 2007) "Special Issue: Rhetoric and the War in Iraq" by guest editor Herbert Simons. Interesting here is how the Bush administration's contextual reconstructions deployed melodramatic crisis narrative (Simons), Manichean redemptive violence (Ivy), flimsy patchwork evidence from unvetted intelligence (Jamieson), strategic misrepresentations (Winkler), and disdain for legislative deliberation (Birdsell) to rhetorically pre-construct their preemptive justifications for a war in Iraq that Neoconservative policy hawks in Bush's cabinet from the Project For A New American Century had been advocating since the Clinton era. For more on the toxicity of such pre-emptive rhetorical strategies for democratic decision-making, see: Neta Crawford, "The Slippery Slope to Preventative War," *Ethics and International Affairs* 17.1(2006): 30-36; Richard B. Miller, "Justifications of the Iraq War Examined," *Ethics and International Affairs* 22.1 (2008): 43-67; Andrew Rojecki, "Rhetorical Alchemy: American

## CONCLUSION: PREEMPTING DELIBERATION?

Several commonalities and divergences between preemptive apologia and prebuttal are thus discernibly significant. As Benoit (1995) hypothesizes, preemptive apologia would attempt to frame the *kategoria* for evaluating the *apologia* and thus diffuse attack as an anticipatory image restoration “complicating the relationship” between an act and its contextualization (85). Mueller (2004) rightly notes preemptive apologia is “turning a traditionally defensive posture into an offensive rhetorical move” that can be “a calculated move to force identification” with a rhetorical vision fantasy which may narratively “deny reality” while also subverting democratic processes or public deliberation (25-27). Ryan (2001) suggests that preemptive justification for a *fait accompli* future action indeed functions to covertly avoid or defer full public deliberation. Hood, Rothstein, and Baldwin (2011) similarly identify prebuttal as a public relations stratagem of “blame avoidance” or “blame-shifting” to proactively quash or deflect public criticism with narrative framing. Smith (2002) observes that prebuttals are “preemptive strikes” for organizational image management premised upon notions that “the first one to tell the story, sets the tone,” since a “first telling of a story becomes normative” (101-102). Particularly fascinating in these accounts, therefore, is the narrative adequacy of a justificatory apologia when it is narrowly used as a preemptive attack to avoid, shift, or intentionally limit if not muddle public deliberation of blame and responsibility. If preemptive apologia covertly seeks to justify some *fait accompli* future action as a constitutive narrative of its own *kategoria*, then the prebuttal is primarily often used narrowly as an obfuscating attack rather than a covert defense, an offensive strategy that narratively shifts blame even as it subverts deliberation or democratic processes with selective information for retroactive nondisclosures. Future research might thus explore whether preemptive apologia functions as a defensive tactic of anticipatory recontextualization, whereas the prebuttal is often invoked as an offensive strategy to pre- (or de-)contextualize future actions. The increasingly frequent practice of a televised prebuttal to a Presidential address by the opposition party, for example, seems overtly intended as a preemptive contextual reconstruction of agenda framing. That is, like other forms for narrating explanations and excuses, preemptive apologia can be put to ethically-questionable narrative purposes that may be decontextualizing as readily as recontextualizing, partisan rather than deliberative, polarizing rather than transcendent, and deceptively misdirecting rather than contextually clarifying.

Public accountability indeed falters when the personal convenience of nondisclosure becomes rhetorically reconstructed as a misdirecting strategy of mediated image management,

thereby pre-empting discussion or avoiding disclosure as a matter of higher principle. Rather than answer questions or accusations, or face later accountability, political opportunists can claim they've already offered sufficient explanation previously in the hopes that the sound-bite conditioned attention spans of mediated publics will turn elsewhere before the bluff can be called. Pre-emptive apologia in such mediated political contexts is dangerous because it is inherently self-serving and poor substitute for critical dialogue and public accountability. It matters very much whether a cartoon or the Constitution is at stake, true enough, but the rhetorical strategies being invoked are strikingly similar. The real difference in Watterson's case is that in hindsight he did indeed offer a highly detailed prior defense for his principled action, as ethically questionable as this covert tactic may be for alienating some audiences, whereas Clinton and Bush campaigns purposefully invoked the strategy of prebuttal as an offensive framing strategy for "anticipative blame-avoidance" (Hood, 2011) to avoid scrutiny and full disclosure.

These ethically troubling trends of prebuttal, from partisan political attacks and preemptive war rationales to corporate misdirections after hurricanes or oil spills, demand our further rhetorical investigation and theorization. But rather than falling into a Manichean right/wrong or truth/deception binary for assessing conflicting apologia narratives, perhaps better to understand kategoria and apologia as co-constitutive Burkean dramas tempting us toward Tragic or Comic frames of acceptance as ideological fantasies (Gunn and Treat, 2005). By way of Brummett (2009), Watterson's use of a ceremonial form to smuggle in propositional arguments offers a helpful homology for attending to the subtly persuasive content that may covertly "piggyback" expected conventional forms (20). In the case of the Bush administration's preemptive rhetoric for invading Iraq, interrogating discourses for pseudoreligious demonization (Ivie, 2004) may better equip audiences to move beyond tragic if "warrantable outrage" toward a humble comic irony of cooperative reconciliation (Desilet and Appel, 2011) which critically understands failures of ethical deliberation as mistaken rather than vicious. Mapping shifting Pentadic ratios for the Act in question may also illuminate apologia choices and possibilities for criticism beyond Scenic ones (Depalma, Ringer, and Webber, 2008).

Answers to why the popularity ratings of presidents and public figures continue despite such transparent hedging and strategic nondisclosures are elusive, but *Calvin & Hobbes* posit one charitably Comic perspective. Calvin muses: "Isn't it strange that evolution would give us a sense of humor? It's weird that we have a physiological response to absurdity. We laugh at nonsense." Replies Hobbes: "I suppose if we couldn't laugh at things that don't make sense, we couldn't react to a lot of life." Calvin ponders, arching a wary eyebrow: "I can't tell if that's

funny or really scary.” As Watterson seems to imply in both his work and his commentary, to tell the difference may require more critical reflection and ethical scrutiny than that exercised by a precocious cartoon boy and his imaginary tiger.

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## ENDNOTES

<sup>1</sup> <http://www.cnn.com/2008/POLITICS/01/23/bush.iraq/>

<sup>2</sup> Glenn Kessler, "U.S. Decision on Iraq has puzzling past: Opponents of war wonder when, how policy was set." *Washington Post*, 1/12/2003, A01: <http://www.washingtonpost.com/ac2/wp-dyn/A43909-2003Jan11?language=printer>; Observes Robin Cook, former British Foreign Secretary and leader of the House of Commons, of the Bush administrations preemptive tactics: "Instead of using intelligence as evidence on which to base a decision about policy, we used intelligence as the basis on which to justify a policy on which we had already settled" (*Washington Post*, 6/28/03, A25). "Yesterday's long-awaited Senate Intelligence Committee report further solidifies the argument that the Bush administration's most blatant appeals to fear in its campaign to sell the Iraq war were flatly unsupported," *The Washington Post*, 6/6/2008. <http://www.washingtonpost.com/wp-dyn/content/blog/2008/06/06/BL2008060602283.html>; Helen Thomas, "Report shows Bush wrong about Iraqi WMDs," 18 January 2005: <http://www.wlwt.com/helenthomas/4103665/detail.html>; Seymour Hersch, "The Stovepipe: How conflicts between the Bush administration and the intelligence community marred the reporting on Iraq's weapons," *The New Yorker*, 27 October 2003: [http://www.newyorker.com/archive/2003/10/27/031027fa\\_fact](http://www.newyorker.com/archive/2003/10/27/031027fa_fact) "Events leading up to the 2003 invasion of Iraq: The Decision to invade Iraq." Center for Grassroots Oversight. [http://www.historycommons.org/timeline.jsp?timeline=complete\\_timeline\\_of\\_the\\_2003\\_invasion\\_of\\_iraq&general\\_topic\\_areas=decision](http://www.historycommons.org/timeline.jsp?timeline=complete_timeline_of_the_2003_invasion_of_iraq&general_topic_areas=decision)

## **Gender and Power: A Thematic Analysis of Senior Citizen Sexual Communication**

Jessica M. W. Kratzer

Much of the previous research on senior citizens focused on sexual challenges with little attention given to sexual communication in romantic relationships. The current study was designed to explore issues of gender, power, and cohort designation and their effects on sexual communication in senior citizen romantic relationships. Twenty-three senior citizens, aged 77-93, participated in in-depth interviews that examined gender roles throughout their current romantic relationships. Three major themes emerged: gender roles over time, power and control related to medical issues, and gendered sexual participation.

The number of elderly people in the United States has doubled from almost 17 million in 1960 to 35 million in 2000, and is estimated to increase to more than 53 million by 2020 (United States Bureau of the Census, 2002). More research has been conducted on aging as the number of elderly people has increased; however, this research often focuses on relationship types (e.g., Cooney & Dunne, 2001) and challenges (e.g., Sharpe, 2004), while the communicative aspects of their sexual lives are rarely examined (e.g., Dickson, Hughes, & Walker, 2005).

Communication research on senior citizen sexual communication has limitations. Current literature on senior citizen sexuality lacks an examination of power, gender, and traditional relational ideology, perpetuating the idea that these issues do not exist or are not as important for our aging population. The purpose of this phenomenological inquiry is to articulate the essences of meaning in senior citizens' lived experiences of sexual communication with their partners. The focus of this study is on how gender and power affect senior citizen men and women's communication.

### **Literature Review**

#### **Age and Generational Cohorts**

##### **Doing age.**

The concept of *doing age* comes from the original idea of *doing difference*, which is a concept created by West and Fenstermaker (1995a, 1995b) that offers a new way to think about race, class, gender, and social inequality. These researchers state that people enact race, class,

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and gender as a way to portray differences about themselves that are influenced by the social world. For example, people, regardless of biological sex, perform gender in relation to masculinity and femininity, which results in the performance of these gender types at varying levels. Doing difference has been expanded to include age (Olson, Coffelt, Dougherty, & Gynn, 2007).

Age is another important identifier for people. Specifically, Olson and colleagues (2007) examined doing age as “the construction of age through interaction rather than only examining age by its numerical identifier” (p. 178). According to Allen (2004), race, gender, and age are aspects of identity that intersect. However, race and gender are quite stable markers of identity that do not usually change over time while age is constantly changing and is, therefore, fluid (Olson et al., 2007). The fluidity of age makes it difficult to create stable performances of age identity across one’s lifespan; however membership in a *generation* or *cohort* provides some stability to this personal identifier (Olson et al., 2007). Generations allow people to be grouped together by their year of birth, social events (e.g., war), and personal experiences (e.g., common age for marriage during a specific time period) (Zemke, Raines, & Filipczak, 2000). Therefore, understanding the generational cohort of current senior citizens allows insight into some of the more permanent performances of age.

#### **The contemporary senior citizen cohort.**

All people are members of a specific generation that is marked by their birth and other large events. According to Olson et al. (2007), members of society are loosely bound into generational cohorts. The term *cohort* is defined by Zemke et al. (2000) as a group of people who are born in the same general time span and who share similar life experiences, such as starting school, going through puberty, and getting married around the same time. According to Riley (1986), “as the members of the same cohort respond to shared experiences, they gradually and subtly develop common patterns of response, common definitions, common beliefs, that crystallize into common norms” (p. 170). A practical aspect of cohorts is that they allow researchers to examine people in different age groups who may have unique social agendas depending on the historical era in which they have lived (Mangen, 1995). In Zemke and colleagues’ book (2000), the authors’ identify four generations in the workforce of the late 1990’s, which include the Veterans (1922-1943), the Baby Boomers (1942-1960), the Generation Xers (1960-1980), and the Nexters (1980-2000). Currently, those in the Veteran generation are between the ages of 69-90.

Sexuality changes and evolves with each new generation. According to Levy (1994), the social and sexual climate in which people have their first sexual experiences (teen, young adult) may vary depending on the time period. For example, growing up in the 30's and 40's before birth control and during a time when attitudes and norms about sexuality were more conservative was quite different than in the 60's when birth control was common and easily accessed. Levy (1994) stated, "any discussion of aging and sex must be sensitive to the changing nature of sexual behavior across the human life course as it is situated within the social forces, events, and value structures of a particular historical period" (p. 288). Therefore, our current elderly population is likely to have more conservative views of sexuality.

The Veteran generation is unique due to the social and cultural issues that people were dealing with during that time. The conservative cultural values, and national and international issues that affected home life (e.g., The Depression, WWII), influenced the ways individuals were expected to act in all aspects of their lives. Cohorts have the potential to greatly affect our views on cultural norms, therefore examining the contemporary relationships of today's senior citizens adds additional context to understanding the sexual lives and communication of these individuals. A review of such relationships and the communication embedded within them is explored next.

### **Sex in Long-term Relationships**

It is important to consider studies that have explored sexual activity in long-term and married relationships. The research indicates that men tend to initiate sexual interaction in married and cohabiting relationships much more often than women do (Cupach & Metts, 1991). The frequency of sex tends to diminish with increased age, length of the relationship, marital unhappiness, and probability of separation (Donnelly, 1993) as well as during and soon after pregnancy (Christopher & Sprecher, 2000). Call, Sprecher, and Schwartz (1995) found that marital sex decreases steadily from early adulthood to later adulthood. Sexual frequency decreased as the age of the participants increased, which is often due to medical problems. The decline may also be due to habituation, which is when a couple has sex frequently during the "honeymoon" period of their marriage and the frequency of sex declines over time.

Sexually active and inactive relationships differ in regards to their relational satisfaction and the amount of time the couple spends doing other activities together. According to Donnelly (1993), the more mutually satisfied each partner was during normal interactions, the less likely they were to be a sexually inactive couple. People in these marriages tended to be happy in their marital relationship and shared more activities together. People in sexually inactive marriages were more likely to be unhappy and share fewer activities together. In Donnelly's study, couples did not have health issues that affected their sexual abilities. Although, Hinchliff and Gott (2004)

found that when sexual intercourse ceased to happen for a couple due to aging issues, the couple found other ways to compensate for that loss. In a study using a national sample, researchers found that marital satisfaction was the second most highly associated variable in relation to sexual activity (Call et al., 1995).

Sexuality in long-term relationships is viewed as important for many individuals. In long-term marriages, Hinchliff and Gott (2004) found that most people felt that a continued sexual relationship in their marriages had a positive impact on their quality of life. They also found that people in long-term relationships benefited from a sexual relationship with their partner because the intimacy gave them self-confidence, created a continuing bond between them and their partners, and made them feel, or remember being, young. A study by Brecher and Editors (1984) found that the majority of couples over the age of 50 and in happy marriages rated sex as an important aspect of marriage whereas 54% of people in unhappy marriages rated sex as having little importance. This study shows that relational satisfaction may be an important aspect of sexual desire and activity.

### **Aging, Health, and Sexuality**

#### **Health benefits and values of sexuality for older adults.**

There are benefits of sexuality for older adults that include increased satisfaction and self-esteem. In a study on the successful aging of women, researchers found that many older women were interested in continuing their sexual relationships (Woloski-Wruble, Oliel, Leefisma, & Hochner-Celnikier, 2010). The study also found that participating in sexual activities was a component to increased life satisfaction. A study by Johnson (1998) found that older women described themselves as healthy and sexually satisfied even when they had health problems (e.g., hysterectomies). It was suggested that an older woman's perspective of her health issues and her adjustment to those issues affected her sexuality differently. Johnson (1998) also found that women who had more liberal sexual attitudes also had more sexual satisfaction. These women tended to be younger, in a sample aged 50-89.

Self-esteem has been a factor that can be beneficial to sexual relationships. For instance, Johnson (1998) found that health affected self-esteem, sexual attitudes, intimacy, sexual participation, and sexual satisfaction; therefore, if someone is healthy, they have more self-esteem. Burgoyne (1982) found that self-esteem is an important aspect to feeling sexually adequate and for initiating and participating in sexual activities.

Motivation for sexuality changes as one ages. For example, children discover sexuality through curiosity, adolescents explore and become more comfortable with their bodies, and

young adults experience the transition from independence to coupling and procreation (Levy, 1994). However, this changes in mid-life. Fishel and Holtzberg (2008) stated, “a new field of healthy sex for older people is emerging” (p. 86). This new field includes different types of intimate play and being more imaginative because many older women are more relaxed with their bodies and feel freer. Not only are some senior citizens having more fun with sex but many are still placing importance on sexuality.

Some senior citizens think having sex is still important and worthwhile. Many of the women in a study conducted by Dickson et al. (2005) discussed the importance of affection, touching, and sexual intimacy. Bulcroft and O'Connor (1986) found that the role of lover was important for their participants. Wiley and Bortz (1996) reported, of their 158 participants, 66% of men and 57% of women under the age of 70 desired sex two or more times a week. Fifty five percent of men and 48% of women over the age of 70 also desired sex two or more times a week. Gott and Hinchliff (2003) found that participants who were still participating in sexual activity placed importance on the act itself. Many senior citizens place importance on sex as a way to connect with their partners and feel pleasure; however sexual activity may decrease due to challenges that arise with old age.

#### **Health challenges to sexual activity.**

Unique health challenges may interfere with normal sexual functioning as people age. Challenges that can occur include physical challenges for men and women, overall health, using erectile dysfunction medications or choosing not to, and the possibility of adjusting to non-penetrative forms of physical intimacy.

As a man ages, sexual health challenges may begin to impede his ability to perform sexually. According to a study by Nicolosi, Laumann, Glasser, Moreira, Paik, and Gingell (2004), common sexual dysfunctions for men were early ejaculation, erectile difficulties, lack of sexual interest, inability to achieve orgasm, and a feeling of unpleasurable sex. According to Wiley and Bortz (1996), 83% of their male participants under the age of 70 and 86% over the age of 70 reported having difficulty with erections more often than they did 10 years earlier. The occurrence of erectile dysfunction increases as one gets older, yet aging alone is not the cause of this occurrence. Instead, medications and medical conditions are considered more likely causes (Sharpe, 2004). Another possible challenge is raised by Green (1994) who states that, “erectile dysfunction in older men is often the consequence of neither partner understanding the physiological changes in genital function coincident with advancing years” (p. 342). In younger years, visual stimulation was adequate for having an erection but as one ages, tactile stimulation becomes necessary. If partners continue to participate in sexual activities as they always have



without communicating about their bodily changes, they may believe the male is impotent because they do not recognize the need for change.

Women experience different health challenges than men when it comes to sexual activity. Researchers found that common sexual dysfunctions for women were lubrication difficulties, pain during intercourse, lack of sexual interest, inability to achieve orgasm, and a feeling of unpleasurable sex (Camacho & Reyes-Ortiz, 2005; Nicolosi et al., 2004). DeLamater and Sill (2005) found that women who take several medications have less desire to participate in sexual activity. While physical challenges may present themselves to older adults, medication may pose another challenge.

General health and medication use may be additional challenges in older adult sexual relationships. Later-life men and women experience unique challenges in their sexual relationships that may differ based on their general health. Lindau, Schumm, Laumann, Levinson, O'Muirheartaigh, & Waite (2007) stated that an individual's physical health is more strongly related to having sexual problems than age. People with good health were more likely to have an intimate relationship and to be sexually active with their partner (Lindau et al., 2007). Factors associated with old age, and not age itself, impact how senior citizens prioritize sex and may lead seniors to place less importance on sex (Gott & Hinchliff, 2003). Illnesses and diseases such as prostate problems, heart attacks, and strokes can cause a person to feel inadequate and sexually unattractive (Woody, 1989). Some medications may also interfere with a person's level of desire, arousal, and orgasm potential (Woody, 1989). Similarly, Schiavi (1994) stated that the effect of chronic illness, disease, and medications could harm sexual responses. In a study by Camacho and Reyes-Ortiz (2005), about one third of the elderly have at least one complaint about their sexual functioning, yet about 60% are interested in maintaining sexual activity. Life satisfaction of later-life participants, in a study by Turner and Adams (1988), was higher if their preferred sexual activity was intercourse.

While medications for health problems may interfere with sexual functioning, there are also medications that can improve sexual functioning. According to Lindau et al. (2007), nearly one in seven men had reported using medication to improve their sexual functioning. Some senior citizens are becoming more sexually active due to the current Viagra phenomenon. However, it appears that some senior women are not as excited about the current rise in their sex lives. According to Loe (2004), senior women have mixed responses when discussing how Viagra has changed their sex lives. The findings of her study revealed that some women found sex to be very important in their relationships and had enjoyed the increase in sex with their partners. However, other women were disappointed in the rise of sexual initiations made by their

partners because they had enjoyed their decreased, if even nonexistent, sex lives as they had grown older. Not only has the use of Viagra brought mixed responses about sexuality, but it has also given senior women a reason to communicate about their views on sexuality in a way that is pertinent to their current lives (Loe, 2004).

While the use of medications to improve sexual functioning has received varying responses, some senior citizens have chosen to face their sexual functioning challenges without medication: Instead, they chose to find alternative ways to express intimacy. For example, some senior men have chosen not to use erectile dysfunction medications and have found other acts of sexual pleasure, such as touching, to be just as enjoyable as intercourse (Potts, Grace, Vares, & Gavey, 2006). This study, as in the study mentioned earlier, resulted in mixed responses. As summarized from a study by Potts et al. (2006), some senior men found that having an erection and participating in intercourse was important, while others found that learning to deal with the changes in one's sexual ability to also be satisfying. Whether or not senior citizen couples choose to use medication to assist them in sexual functioning, other behaviors can be used to show intimacy.

Some older adults have had to reprioritize the emphasis placed on intercourse with other intimate behaviors. Sexuality and intimacy do not have to be directly related to penetrative intercourse (Richardson, 1995). Reprioritizing the value placed on sex was often done among senior citizens experiencing barriers to sexual activity (Gott & Hinchliff, 2003). Participating in intimate behaviors such as cuddling and touching was central to the well-being of these participants (Gott & Hinchliff, 2003). Hinchliff and Gott (2004) found that eight of their participants were no longer having penetrative sex due to erectile dysfunction or health issues related to their partners or themselves. These participants stated that sexuality could be expressed through touching, cuddling, kissing, hugging, and petting. There are both benefits and challenges to sexual relationships for senior citizens.

Understanding cohort norms, relationships types, and benefits and challenges to sexuality offers insight into our current aging population. This study is meant to explore how generational norms, gender, and power affect sexual communication as one ages. Therefore, to better understand this phenomenon, the following research question will be explored:

RQ: How is relational power negotiated with regards to seniors' discussion and enactment of sexual intimacy?

## Methods

### Data Collection

#### Participants.

According to Lindloff and Taylor (2002) reaching theoretical saturation is more important than obtaining information from a specific number of participants, as in quantitative research. Theoretical saturation occurred early on in data collection; however, 23 individuals participated in the study. The participants in this study were senior citizens aged between 77-93 with an average age of 84 (one person did not reveal his/her age). There were 10 (43%) male participants and 13 (57%) female participants. None of the participants were currently working and all of the participants were retired for a variety of years, ranging from 1 to 53 years ( $M = 22$  years; 2 participants could not remember when they retired). Twenty two (96%) participants were European American (Caucasian) and one person marked "other" (4%). All participants were in a romantic relationship, with 22 (96%) currently married and one in a dating, living apart relationship (4%). The married participants had been married between 8-69 years with an average of 51 years and the dating couple had been together for seven years. Seventeen (74%) of the participants had never been married to anyone but their current partner, four (17%) participants were widowed, and two (9%) were divorced. All participants were in heterosexual relationships. Of the 23 participants, there were nine couples (18 people interviewed individually) that had been married between 18-60 years with a mean of 50 years. All interviews were conducted separately allowing me to gain insight into each individual's experience with sexual communication.

#### Recruitment.

The sampling technique used in this study was criterion sampling (Miles & Huberman, 1994). This type of sampling allowed me to seek out individuals, both male and female, who fit into three criteria. First, participants were aged 67 or older. Second, participants were in a current romantic relationship that ranged from being married to a dating relationship, although all but one participant was currently married. Third, participants lived in an independent residential community for senior citizens (two lived in an assisted living facility but were very independent). Recruiting at these facilities was expected to offer the opportunity for the most diversity of senior citizen relationships; however, 18 of the 23 participants were married couples and the other five

were also in committed relationships (married or dating) although I did not interview their partner.

At each location I contacted a potential sponsor (e.g., activities director, administrator, or administrative assistant) who worked at each community in order to get permission to recruit at their location. According to Lindlof and Taylor (2002), the sponsor “usually goes around to others and personally introduces the researcher, vouches for the project, and helps the researcher find informants or resources” (p. 104). Sponsors at each location were helpful by contacting residents who were in relationships and asking them if they would like to be interviewed.

### **Interviews.**

Interviews needed to be conducted in a comfortable setting for participants. According to Lindlof and Taylor (2002), a naturalistic setting may be the best option because it is most comfortable for the participants. For this study, all interviews were conducted in the participants’ apartments, except one that was conducted in the chapel room of the community.

Participants were asked to openly discuss their sexual communication experiences with past and/or current partners based on a series of questions. The questions were used as a guide to encourage participants to talk freely about sexual communication. This method allowed the participants to speak freely and reveal issues related to sexuality that may not have been considered.

A consent form containing information about this study was given to each participant to read and sign so they were aware of the proceedings and agreed to participation in the study. All interviews were openly tape-recorded and later transcribed; however, participation in this study was strictly confidential, and I used pseudonyms in place of the participants’ real names. The interviews lasted between 18-88 minutes with a mean of 53 minutes. Six interviews were shorter than 30 minutes and this occurred because some participants did not want to share much information and rushed through their answers.

## **Data Analysis**

### **Thematic analysis.**

Phenomenological research seeks to understand the essence, or essential meaning, of the experiences of others (van Manen, 1990). In order to reflectively appropriate and understand the essence of senior citizen sexual communication, I started smaller by understanding the individual experiences of participants and then reduced those experiences to themes. Therefore, a thematic analysis was used to analyze the interviews conducted for this study. For van Manen (1990), “thematic analysis refers then to the process of recovering the theme or themes that are embodied

and dramatized in the evolving meanings and imagery of the work” (p. 78). Therefore, themes are residing in the data and I, as the researcher, worked to find these themes within the interviews that I conducted.

Once all of the data had been collected, the interviews were transcribed resulting in 864 pages of transcription. I used a color-coded system by using the highlighter feature in Word so that all coding was done electronically. First, I highlighted recurring themes in different colors for each of the interviews. Then, I gave each theme a code name and used that name to identify them in separate Word documents. I copied and pasted the quotes for each theme into a separate document created for each individual theme. After analyzing the transcripts individually, I also did a dyadic analysis of the nine couples in this study to explore whether or not there were themes among the couples. The same system of analysis was used but new Word documents were created for quotes from the couples in relation to emergent themes. After analysis, the results needed to be validated.

#### **Validation strategies.**

Validating the accuracy of findings can be done in many ways and Creswell (2003) suggested using one or more strategies. Two strategies of validation were used for this study: rich, thick descriptions and member-checking. First, rich, thick descriptions were used to decide if the data are transferable to other people and settings (Lincoln & Guba, 1985) by offering a detailed description of participants’ experiences and using direct quotes from participants. Second, member-checking occurs when the researcher asks some participants to review the findings as written by the researcher to decide whether or not the findings and interpretations are credible (Creswell, 2007; Lincoln & Guba, 1985). I discussed a summary of my results with five participants and they agreed that my interpretations of their experiences were germane to their actual experiences.

#### **Results**

The research question guiding this analysis focused on how relational power was negotiated with regards to seniors’ discussion and enactment of sexual intimacy. The first major theme focused on gender roles over time, which includes a discussion of when the participants were younger and after retirement. The second major theme was broken down into two subthemes: The first focused on how seniors allowed medical issues to take power over their sexual lives. The second subtheme focused on who had power and control in the relationship. The third major theme focused on who had power in the sexual relationship and why, with an emphasis on when they were sexually active. The fourth major theme was divided into two subthemes: the first focused on how participants assigned meaning to intimacy and the second

showed how participants reframed intimacy to meet their current needs. We begin with an exploration of gender roles over time.

### **Gender roles over time.**

The results for this section show that most of the senior citizen couples, who have been married for 50+ years (which was 17 of the 23 participants), were quite traditional: Many of the participants mentioned the wife being a housewife and mother while the husband was the breadwinner. Most of the men mentioned helping out with household duties like cleaning occasionally, but it was clear that these were not common chores for them to do. However, most of the men did yard work and household repairs. For example, Ginny mentioned all of the tasks she did in the home while her husband was the breadwinner and also did yard work.

I I kept-- I did the cooking, the house cleaning, cared for the children, gardening, did all the clothes, making and everything. [He] Had a lawnmower. Tilled and planted the garden. (Ginny, 2943-2967)

Ginny's experience was similar to almost all of the women in this study. Traditional ideological roles for women from this cohort have typically included childcare and housework and not bringing income into the home. Roles for men have included being breadwinners, which gave them financial power in the family, as the home could not function without financial support.

Two men, in particular, mentioned how important gendered roles were. First, Richard stated that men and women have distinct roles given by God as a person's purpose in life. While some participants may or may not have agreed with the way he worded these thoughts, it seemed to encompass the ideas that most of the senior citizens in this study had lived by.

I think one of the things about life that I've learned in my 87 years, is to stay focused. Stay focused on your goals, on your, on on your purpose in life. Everybody has a purpose. God created you for a purpose. And my purpose, a man's purpose if he's a normal man, is to be a warrior, one thing. I don't mean just go to war like I did, but to be a warrior. It might be a warrior with their job. It might be a warrior with the community, the people that you live around. But you, men was created to be a warrior, is to go out there and earn money and bring it home. Wife is created to be a homemaker. And he said the two shall be one. (Richard, 486-493)

Similarly, while talking about his first wife, Vincent stated that a woman's most important job, or gendered role, was being a mother. This was also a common belief that seemed to be held by many of the participants, not through explicit discussions about women as mothers, but through their description of gendered household duties.

She was doing the more important job. The most important job a woman ever has is raising children. She was a home economics major, a good cook, a good mother. She liked to sew. Uh. She backed the children up in their school activities we did back then. Uh. And we had a lot of fun. Yeah. I used to come home and chop down the oak trees

about that big around and make firewood out of 'em. Cut the grass and built the little stone wall. (Vincent, 1590-1619)

The common division of roles for these seniors, as discussed above, is a cohort norm for this group of participants (Friedan, 1963). It is important to point out that this was not a norm for everyone during this time period; however, it was considered a norm for white, heterosexual, married, middle-class couples (Friedan, 1963). During interviews, the participants did not mention discussing their roles with their spouses; therefore, it seems as if these gendered roles were expectations possibly furnished by the roles their parents played and the norms of their cohort. This is important because it offers an understanding of the expectations that these seniors had for themselves and their partners throughout their relationships. Most seniors in this study participated in gendered roles when they were younger, yet many of these roles shifted as they entered retirement.

The results also showed that many participants' household gender roles shifted as they aged. Yet, it is important to note that all but three participants lived in facilities that provided cleaning and food services; therefore, many traditional gender roles are automatically neutralized as they no longer have to cook, clean, do household repairs, tend to a yard, or work. Most of the apartments had small kitchenettes with toaster ovens, microwaves, refrigerators (varying in size depending on the location), and sinks. Only one couple did not have a kitchenette because they lived in an assisted living facility, but they had purchased a small refrigerator for drinks and snacks. Some of the participants shifted their gender roles as they got older, before moving into a retirement apartment community; after retirement, many of the men began assisting with cooking and cleaning more than they had when they were younger. For example, Marie explained that her husband did a majority of the cooking and vacuuming after they retired. She and her husband lived in independent living apartments with no cooking or cleaning assistance so they shared more roles.

And I do most of the financial stuff. No. He does 9/10 of the cooking and I do 10/10 of the dishes. He doesn't do dishes. He vacuums and he does the cooking. I mop the floor occasionally in the kitchen and the bathroom. I dusted the other day. I hate dusting. So I don't do it very often. But he does, he makes a mess on the floor with all his wood carvings and stuff, so he does the vacuuming. (Marie, 622-658)

Marie's experience seemed to be true for many of the participants before most of them moved into independent apartments that offered assistance. For the participants that lived in facilities that offered more assistance, many of their gendered roles were neutralized. For example, Ginny gave a description of the services provided at all but one of the independent living facilities I recruited from.

Change the sheets on your bed, pick up all the towels. They furnish your sheets, furnish your towels. Every Wednesday, they come in here and take the, change the bed, put clean sheets and clean towels. Vacuum all the floors, clean the bathrooms, clean the bathroom floors, dust. That's it. (Ginny, 3028-3031)

Ginny gave a clear idea of the cleaning services that were provided and therefore that aspect of gendered roles was removed from most of the participants' daily lives. It is also important to point out that these facilities also provided at least two meals a day yet were still considered to be independent living facilities.

Gender roles for many of the seniors changed after retirement with the men doing more housework and cooking than they did when they were the breadwinners. This shows a shift in the cultural norms for this cohort. This is most likely due to an adjustment to not working yet still wanting to contribute to the household. Many of these senior couples had experienced a shift from having separate gendered roles when younger and raising children, to the men stepping in and helping with household duties after retirement, to having very little gendered responsibilities as far as household chores after moving into a retirement community. The shift from traditionally separate roles to sharing roles after retirement seemed like an easy transition for most of the couples. Now that we understand more about this cohort's traditional gender role ideology and how they negotiate gender over time, we are better positioned to understand how these individuals experience power in their relational lives with regards to sexual intimacy and the effects of medical problems as they have aged.

#### **Power and Control Related to Medical Issues**

Gender roles may have shifted as they or their partners retired and as they moved into retirement communities, but health problems also affected the roles these participants had to play as their partners' health deteriorated. Medical issues affected how these seniors negotiated both sexual power and relational control in their romantic relationships in two ways. First, health problems for one or both partners were often the reason that a sexual relationship ceased. Second, one person in the couple gained relational control when they had to be the caregiver for their partner due to their partners' health problems.

#### **Medical issues have power.**

Most of the men in this study had suffered from erectile dysfunction ceasing their ability to have sexual intercourse. In most cases, this ended their wives' sexual lives as well. The participants expressed that medical issues that came along with age affected their sex lives more than any other factors, resulting in many of the participants giving their sexual power over to their ailments. For example, Vincent talked about what prostate cancer had done to his sex drive and



masculinity, "[I have] prostate cancer. Which desensitize masculine characteristics. They make a eunuch out of a guy" (1038-1050). Several of the male participants had prostate cancer at some point in their later lives making them unable to get erections and participate in sexual intercourse. Similar to Vincent, Dave mentioned that the medication he took for his prostate cancer gave him female characteristics such as larger breasts. The side effects of prostate cancer and the medications taken for it have made some of these men feel less masculine. Most of the men casually mentioned their erectile dysfunction and downplayed the effect it had on them and their partners. They were obviously disappointed in their inability to have intercourse and felt less masculine due to the side effects of some medications and not being able to perform sexually. Being sexual is considered an important factor to being masculine, which is why it is understandable that these men would be upset and possibly embarrassed by their current sexual status. For example, Ben talked about being discouraged due to physical ailments that affected him and his wife's sexual relationship.

Well, um. I think physically, uh I think [wife] was 40-some when she got a hysterectomy. And of course after that, she had no fear of getting pregnant anyway. And I had a, I was 70, 70-something when I had prostate cancer. And it kind of discourages you. You you don't, you don't, you don't have the testosterone levels that you had then. So I don't remember consciously stopping, we just didn't at some point. (Ben, 960-975)

Most of the men with sexual dysfunctions did not mention continuing other intimate activities in order to serve their wives' sexual desires. Therefore, the gendered norms of men's sexual needs being met before women's seemed to be true for these participants. Most of the men could not get erections and therefore could not have intercourse so their wives' sex lives also ended. Frank is the only participant who could not have intercourse yet still participated in heavy petting with his wife; whereas, the rest of the men who had erectile dysfunction did not participate in any sexual activity with their partners. Yet, a few of the women, including Blanch, mentioned still having sexual desires.

Yes. Um. I can't remember, can't remember when we uh ceased having sex. We we don't now. We haven't in a long time. I think, well, he was afraid that he would hurt me. You know, and I don't--I don't know why he felt that way. And I really um, I really wanted sex. Even, there was, there was, we did to go through a period of time when I had a problem with him not wanting to have sex, you know. He will probably not even remember this. But uh I probably should have gone to the doctor and and said, "Hey, something's wrong," you know. I think he finally did come around, but I mean I would have been sexually active much longer. (Blanch, 1069-1095)

Blanch and her husband were no longer having intercourse due to his erectile dysfunction and this quote is an example of the sexual desires that some of the women expressed during interviews. Blanch openly talked about masturbating as a way she obtained sexual pleasure without her

partner. She was the only participant to mention masturbation as an alternative to sexual activity with a partner. Another participant, Marie, mentioned that she could not have an orgasm without sex and therefore had not had one since her husband became unable to have an erection. Most of the women had an understanding that once their husbands could no longer have intercourse their sexual lives ended as well, even if they still had sexual desires. Again, this stems from gendered norms about who should desire and need sex and, for this group of participants, men's sexuality is considered important and not women's.

Some participants considered or even tried erectile dysfunction medication; however, none of them had success with the drug due to it not working for them or not pursuing the use of it even after considering taking it. For example, Jim mentioned not trying Viagra because he thought that trying to restart their sexual relationship would frighten his wife due to her physical ailments.

And uh so she's had physical problems for quite some time. And uh that, in itself, has s-s- slowed down uh and prohibited uh any kind of a sex life. I suppose I could have taken Viagra or some of these other drugs, but uh I don't, I think that would probably frighten her. She's--We haven't ever talked about it in the sense, in the sense of a sexual relationship uh being revived. I mean she's just assumed that with all of her gynecological uh difficulties that she's had--she's finally had a hysterectomy and uh along the line, and that slowed down any sex drive that she had considerably. So I don't know. We were, for a long time just, uh instead of having sex, we would have uh uh heavy petting is what it amounted to. And then that slowly drifted away. Well, because of the--well, I guess we both had a lack of interest then. And it kind of faded away. I know some men and women are active well into their 80s, and uh but mine stopped uh when I was in uh the 70s so. So it's been about 15 years. And uh it became more difficult for me because uh when we were trying to have sex, I would lose the ability to have an erection. And uh it just wouldn't uh, wouldn't work out, so. (Jim, 1305-1344)

Some men said they could not take Viagra due to medical issues that prevented them from being prescribed the medication. Others tried the medication and it did not work for them. All of the men had considered taking medication to improve their sexual functioning. This attempt at regaining their sexual control is important because these men did not want to give up their sex lives. However, most of the men felt they had to end their sex lives when erectile dysfunction occurred, and none of the men mentioned any consideration of their wives' sexual desires when they could no longer have intercourse.

Health and medical issues can greatly affect the sexual relationships of senior citizens, as we have seen in previous research (e.g., Nicolosi, 2004). However, the gender ideologies that emerged from the interviews with these seniors have added a unique component to the research. For instance, the idea that men's sexuality is the sole focus of whether or not sexual activity occurred placed emphasis on the male as the figure of power and control in the sexual

relationships of these participants. Not only did the men not consider their wives' sexual desires, but the women also recognized that their sex lives were over due to their husband's ailments. Therefore both men and women were surrendering their sexual power to medical conditions. Women were also surrendering their sexual power to their husbands by giving up on their sexual desires with no communication about their sexual needs. As a generation ages, medical concerns seem to rise and the participants in this study had been dealing with health issues for many years.

**Power and control for the healthy partner.**

For some participants, gender roles related to power and control changed as they had aged due to medical issues. For instance, some participants mentioned the need for either themselves or their partners to be in control due to medical problems. As one partner's health deteriorated, the other partner seemed to step in and take charge of duties their spouse used to do. For example, Ginny talked about her husband's deteriorating health and general inability to do things for himself, resulting in her having to manage much of his life.

Who is more controlling? I guess I am. I have to t- control him. I have to help him do the bath, and I have to carry him up. He don't even know how to go up and get his haircut. I have to do all of that. He don't even know how to go to the front door. I have to go to the doctor with him. He don't know how to get off the bus. I mean where to go if he got off the bus. So it's me! And that's--It's hard. It keeps me busy. (Ginny, 3080-3110)

While Ginny discussed being the person in control of her relationship with her husband due to medical issues, Mary admitted that her husband had more control in their relationship. For Mary, there were two reasons her husband had more control. First, she stated that she preferred to have someone else be the leader in a relationship and that she preferred to be the follower. This could be due to individual personality traits or gender ideology related to the roles that men and women are expected to take when married. Second, she was diagnosed with Alzheimer's disease and was becoming more forgetful and needed her husband to be in control of specific aspects of her life so that she did not forget important things.

Well, he's always been the leader. I've always liked that. I needed a leader. I'm just one of those that needed. And so I like for him to lead. But if there's something I disagree with, I don't hesitate to tell him. And uh if there's something I want to do, and he wouldn't have thought of it, I'll feel perfectly free to say I'd like to do that. So it it's worked out real well. I guess we're just real compatible. Because uh he, you know, if it's something I really want, well, he's happy to do it. And if something something he says, "You know, I don't think we should do that," I'm happy to give it up. And it just goes well. Well, I guess because I--well, right now because I have Alzheimer's. But before, even before, I I I liked that. Yeah. I guess I never was real independent. (Mary, 1860-1902)

When asked about control, most participants said they felt very equal with their partners; therefore few of them gave details on control and power in their relationship. However, some participants mentioned medical reasons for them having to take control over certain aspects of their relationships. It is important to note that health issues were an overarching theme for these seniors. Many aspects of their lives were dominated by health concerns and limitations that were not exclusive to their sexual relationships, but apparent in their current living situation and the general communication they had with their partners.

### **Gendered Sexual Participation**

Gender roles and role designation due to medical issues affected these participants sexual communication, but they have also affected the ways in which gender roles were enacted in relation to their past and current sexual relationships. When discussing the initiation of sexual activity, most participants had to refer back to a time when they were still sexually active with their partners. Only three participants were still having intercourse with their partners and another three were still participating in heavy petting with no intercourse; therefore, most participants could not speak to the initiation of current sexual activity. All of the participants agreed that the man in the relationship was the initiator of sexual activity throughout their relationships and most of the participants agreed that the woman in the relationships usually obliged their husband's requests. In this section, a dyadic analysis was used to explore couple's responses in regards to sexual initiation in their relationships. Most of the men stated that when they were ready to have sex they would usually initiate intercourse and their wives would oblige. The men were very clear that they were not turned down or could not remember a time that they were denied their request for sex. For example, Henry said that he initiated sex more in their relationship and his wife went along with his requests.

Right, yeah. I think probably the fact that men need a little—that depends upon the women's, you know, uh um how she's oriented or or how her desires are and and things like that, you know, so. I think most of the time, she just went along with what I requested. (Henry, 298-312)

Henry did not mention whether or not his wife was in the mood for sex nor did he mention her desire to have sex with him. His focus, as was the focus of most of the men, was that she was there to meet his needs whenever he wanted sex. When I asked his wife, Dorothy, if she always obliged Henry's requests for sex, she said, "That was it." To clarify, I asked if she would go ahead and have sex whether or not she was in the mood and she said, "Yeah." Similarly, Hank and his wife were still having intercourse and he was the main initiator.

Oh, I probably have more [control in our sexual relationship] than she does, I suppose. Percentage wise, I'm probably more 60% or 70% more than her because with her physical handicap, a lot of times she's just not not interested, you know, or and it's hard to participate when you're hurting, I guess, like that or have physical problems. No, I'm probably the instigator most of the time or the initiator of it. I'm probably more dominant uh in that area than she is. Oh, her uh I supposed since uh she's gone through the change and whatnot, her interest has been more more diminished than it used to be. But she's still tolerant of me, I guess. (Hank, 400-431)

Hank's wife, Ellen, agreed that he initiated more by saying, "My husband, I think." In Hank's quote, he mentioned that he initiated more than his wife and stated that she was tolerant of him. The use of the word "tolerant" speaks volumes to the idea of masculine sexual power in their relationship and the feminine role of obliging, or tolerating, the man's sexual requests. Not only were men expected to be the initiator, women were expected to meet their husbands' sexual needs regardless of their own feelings. For example, Ben stated that he thought it was his role to initiate sex, which is probably true for all of the men in this study. While I was unable to interview Ben's wife, his quote was a predominant theme for the men in this study. Ben stated, "Well, there was never a lack of sex in our life. Uh. I always thought I was the primary initiator. But that was what I thought my role was, you know" (1689-1694). After this quote, I asked Ben if his wife was comfortable rejecting his request for sex and he said, "It never created a problem. No. She was always very understanding of my needs" (1729-1733). Ben did not answer the question directly because his wife probably never said no to his requests for sex and therefore that made her, in his eyes, very attentive and understanding of what he "needed" sexually. This seemed to be common for the men in this study and may be quite common for men of this generational cohort. They believed that sex was a need that they had and not a need that women had therefore making their requests for sex important without considering their wives' desires.

All of the women also agreed that their partners were the initiators of sex most, if not all, of the time. However, some of the women admitted to initiating sex occasionally but stated that it occurred rarely. And, all of the women said that they would oblige their husbands' requests for sex. Like Mary, most of these women said that they were in the mood when their husbands were in the mood. For example, Mary said, "He was [the initiator]. Yeah. But it wasn't always, you know, not always. Yeah, I was always ready [when he initiated]" (800-808). Mary's experience was very common for the women in this study: They said they were always ready when their husbands were yet they did not mention feeling sexual desires and initiating sex when they were in the mood. All of their discussions about sex seemed to stem from their husbands' desire for sex and not their own. Mary's husband, Ernie, agreed that he was the main initiator. He said that Mary always obliged his sexual requests and there was "never a headache," or reason for her not

to oblige. Therefore, other than the few times the women may have initiated sex, they depended on their husbands to decide when they would have sex. This gave all of the power of their sexual desires to their husbands and left them waiting for his initiation rather than acting on their own desires regularly. For example, Rose talked about initiating sex occasionally but then stated that a woman can get in the mood for sex if she tries.

Sometimes I did [initiate sex]. Like on Sunday afternoon, I might initiate it. And uh and sometimes he'd come to the bed in the mood, but he didn't have, he wasn't big on foreplay, so it just was hard for me to to get excited. By the time I got excited, he was through. Most of the time, I'd go ahead [and have sex], I think. Most of the time. But, you know, a woman can kind of get in the mood if she tries. I guess, pretty much so. Most of the time, I think I did [oblige my husband]. (Rose, 1987-2007)

Again, Rose succumbed to her husband's sexual requests throughout their relationship, just as all of the women stated. When I asked Rose's husband, Richard, who initiated sex more, he said, "I probably did." I also asked if Rose felt comfortable denying his sexual requests and he said, "No." He followed that comment by telling a joke about women always obliging their husband's sexual requests.

As these results reveal, the men in these relationships were often the initiators of sexual intimacy, which is a common role for men in heterosexual relationships (Cupach & Metts, 1991). Gendered norms for this cohort are apparent in these findings, as it is common for people to expect men to initiate sex and women to oblige their partners' requests. Beyond the idea of sexual initiation is the idea of masculine power and control over the sexual relationship and female submission to male power. Social ideologies during this time period may influence the way these seniors viewed their roles as sexual partners.

For most of these seniors, sexual activity was based almost solely on sexual intercourse and very few of the participants mentioned foreplay as an aspect of their sexual relationship. While discussing their youth, they talked about parking and necking; however during discussions about their sex life while married, most seniors talked about sexual intercourse and did not mention foreplay. This lack of foreplay was mentioned by Rose in the quote above and may have been something that many of the women missed. My interpretation is that foreplay was lacking for many of the participants whose sexual relationships ended when the men could no longer get erections. Therefore, when the men could no longer have intercourse, they did not consider other forms of sexual activity to satisfy their wives' sexual desires. However, participants found new ways of defining and expressing nonsexual intimacy once medical issues kept them from performing intercourse.

### **Assigning Meaning to Sexual Intimacy**

The final major theme focuses on senior citizens assigning meaning to sexual intimacy. There are two subthemes that explicate the assignment of meaning to sexual intimacy. The first subtheme focuses on time and how the importance of sexual intimacy changes as a couple ages and is confronted by physical health issues that have affected their sexual abilities. The second subtheme explores how the meaning of intimacy is reframed and broadened to include more diverse expressions of intimacy that do not include penetrative sex.

#### **Importance of sexual intimacy changes with time.**

The participants in this study assigned meaning to their sexual relationships as they changed with age. The results for this theme show that the importance of sexual intimacy decreased over time for all of the participants. The meaning they once assigned to sexual intimacy evolved as they had aged and had experienced physical challenges that impeded their sexual abilities. Some participants emphasized that medical issues or aging bodies hindered their, or their partner's abilities to participate in sexual activity. These changes made them adjust what was important in their relationships. However, other participants simply stated that as one ages the importance of sex shifted to other areas of their relationships. For example, Ernie talked about how age and illnesses affected his sexual relationship with his wife.

You know, uh you get to where sex isn't that important. I mean. You just uh, you love each other in other ways and, you know, you just don't need to do that. Well, I think it's because we're older. And uh you get to where you just don't have that need like you-- Well, you know, young people, uh uh the men can hardly stand it. You get older, you lose that drive. Of course, all my illnesses probably helped me. Actually, uh I think in our society, uh sex has been made too important. It is important, but I think it ought to be not the basis for everything. (Ernie, 1034-1070)

Just as Ernie, other participants tried to make sense of the changes in their relationship by deciding that age, illnesses, and medications affected their sexual abilities making sexual intimacy no longer important. Some participants stated that they may have had conversations with their partners about their sexual challenges but none could remember a specific discussion. Most seniors said they just let it happen and dealt with it but did not actually talk with their partners about their problems. They decided, whether they were the one with the medical problems or not, that sex becomes less important and there are other ways to enjoy each other. For example, Carol gave an example of someone she knew who learned to adjust to an intercourse-free relationship yet through his experience was able to make other forms of intimacy meaningful.

You know, it's interesting there. I took a cl-, was taking a class in UCLA extension. And I I've even forgotten the title of it. But it had to do with uh communication. And um one of the--there were two men there uh from ABC. But one of them was ill with I guess, I don't know whether he'd had penile or testicular cancer. But whatever, he was pretty much castrated. And uh he was talking about uh the way, how this had really helped their sex life because there's so many more ways to enjoy each other, and to uh accept what is. And he said it really was surprising to him that uh it should not be the horrible thing he thought it would be. (Carol, 1264-1284)

Reassigning what they considered to be meaningful intimate moments changed over time and they worked to make sense of their changes, but did so individually and not through discussions with their partners. For all of the participants, the importance of sexual intimacy decreased over time as they aged and dealt with health problems, making other forms of intimacy more important.

### **Reframing intimacy.**

The results show that most of the participants reframed intimacy to include more demonstrations of intimate expression other than sexual intercourse. Only a few of the participants in this study were still participating in sexual intercourse; yet all of the participants discussed ways they showed affection and shared nonsexual intimate moments with their partners. These participants did not talk with their partners about how they should express intimacy as their sexual lives had changed; however, they all seemed to have emphasized the importance of being affectionate to show they still cared for each other. Similar to most participants, Ernie stated that he and his partner showed intimacy by being affectionate with hugs and kisses.

Oh, uh we uh hug a lot, and uh uh high five and and touch hands a lot. It's just uh uh I don't know. We tease each other a little bit. But uh I have erectile dysfunction so we don't have that anymore. But uh we hug, we sleep, uh she snuggles up around, puts her arms around. That's the way we sleep so. We tell each other we love each other and that sort of thing a lot. But we don't make a big deal out of it. You know, we just say it. And we're hardly ever separate. (Ernie, 296-312)

Both men and women had similar responses to Ernie's and therefore reassigned the meaning of intimacy in their relationships as they had grown together and experienced physical changes. Participants no longer had gendered power issues as they did with sexual initiation. Both male and female partners seemed to initiate nonsexual forms of intimacy in order to preserve the closeness in their relationships.

Not only is it important to note that intimacy is shared in nonsexual ways, but it is vital to recognize that the meaning of intimacy changed for seniors as their bodies changed. Most of the participants in this study seemed to have been in loving relationships where being affectionate



and knowing their partner was still with them was very important. Barbara made a great point when she stated that intimacy could be gained in ways other than a physical relationship.

There's intimacy that brings about physical relationship, and there's intimacy that goes beyond physical relationship. It's the understanding so that you know what is in the other person's heart, when the speech is not necessary. (Barbara, 316-322)

The participants may have missed having a sexual relationship but found other ways to express intimacy in order to show their partners that they still cared for them. This does not minimize their experiences with having to adjust to a relationship without sexual intercourse, but it does show that they were willing to find other ways to express intimacy with their partners.

Overall, these senior citizens reframed their definitions of intimacy to be more inclusive of other ways to express closeness. These participants believed that sexual intimacy becomes less important as one ages and has medical issues that affect their sexual abilities. They reassigned what intimacy was in their individual relationships and found other ways to express it.

### **Discussion and Conclusion**

I found that understanding the gendered roles experienced by these seniors throughout their relationships was important due to the traditional ways in which they lived. However, it turns out that medical problems, especially those for men (e.g., erectile dysfunction), were given power over these couples' sexual relationships. Most of the male participants had erectile dysfunction and no longer had a sexual relationship with their wives. Yet, most of the women in these studies did not mention their physical issues as affecting their sexuality. This finding highlights the relational ideology that sexual satisfaction is meant for men (Cupach & Metts, 1991), which may result from their generational norms. The time period they grew up in may have influenced their ideals of sexual pleasure and who should benefit from sex; therefore, once the men in this study were no longer able to participate in sexual intercourse, their sex lives ended without consideration of the women's sexual desires.

While medical issues had power in many of these relationships, a significant amount of power was also given to the healthier partner, regardless of gender. Several participants were the main caregivers to their partners and were more capable, physically and/or mentally, of making decisions regarding healthcare and finances. The healthier partner was given more power for one major reason: not sending the other partner to a nursing home. In order for some of these participants, or their partners, to not live in nursing homes, their partners had to care for them. This gave the healthier partner power over the ill partner because they often had to help them with their daily duties such as bathing, escort their partners to meals, make financial decisions, and be sure their partners took medications and went to doctor appointments.

Another finding in relation to the negotiation of power in relationships was that men were given more power over the sexual relationships for these couples. Using dyadic analysis, this discovery occurred when asking the participants about who was, or had been, the initiator of sexual activity in their relationship. Similar to findings from Cupach and Metts (1991), the men in the current study were usually the sole initiator of sex throughout their relationships. Interestingly, all of the men stated that their wives always obliged their sexual requests, and their wives stated that they always obliged their husbands' requests. While many of the participants said they had open communication with their partners, their lack of examples of discussing sex throughout their relationships led me to believe that they did not discuss their sexual challenges with their partners and ended their sexual relationships when erectile dysfunction occurred.

Alternate forms of intimacy were valued after sexual activity ended for many participants. A study by Hinchliff and Gott (2004) who found that intimacy can be reached through ways other than sexual intercourse. The current study found that most seniors talked about the importance of gaining intimacy through hugging, kissing, and showing that you care for your partner. These findings show that intimacy can come in many forms that may or may not be physical, and can also include a special look from one's partner or just knowing that they are still there with them.

While this study adds to the current body of aging and sexuality research, there is great potential to conduct more research in this area. For example, exploring senior citizen sexual communication issues in relation to gender and power among same-sex couples, minority couples, and people with varying socioeconomic statuses would expand our current knowledge of this phenomenon.

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## ***Kategoria, Apologia and Nikki Haley’s “European Vacation”***

Mark Glantz & Corey B. Davis

*In September 2011, Charleston’s The Post and Courier attacked Governor Nikki Haley for taking a business trip to Europe. The article alleged that Haley’s junket was extravagant and wasteful of taxpayer dollars. Haley later defended the trip in an op-ed, arguing that the trip was necessary for drawing businesses to South Carolina and that she had worked hard to keep travel costs low. This essay examines the persuasive strategies used to attack Haley as well as the strategies she used to defend herself. Haley’s response was not perfect, but it was fitting, as she carefully matched her image repair strategies to the specific accusations against her. Ultimately, the rhetoric surrounding Haley’s “European Vacation” elucidates critical discussions about the role of government in creating jobs and suggests important implications for image repair research.*

In June 2011, South Carolina Governor Nikki Haley participated in a junket to Europe. Depending on which news report South Carolinians read, this trip was either a well-intentioned business trip that could boost the South Carolina economy or a boozy, snobbish, irresponsible romp through Europe (Brundett, 2012; Ocasio, 2011). Her political opponents, comprised mostly of Democrats but also some Republicans, were predictably critical of the trip. One of the earliest and most piercing inquiries into Haley’s trip came in the form of a September 2011 *The Post and Courier* article written by reporter Renee Dudley (2011). The piece’s polarizing headline read, “European vacation or Legitimate Business? Haley’s fiscal priorities under fire as summer ‘jobs’ trip detailed.” Although the article, which was over 1800 words long, included some balanced reporting, substantial portions of it were highly critical of Haley’s actions. As *The Post and Courier* told it, Haley’s trip was expensive, unnecessarily lavish, and poorly timed. Haley used state money to take a European vacation about which most South Carolinians could only dream. In response to the “European Vacation” article, Haley constructed a message of self-defense. Specifically, Haley (2011) wrote an op-ed for *The Post and Courier*, published just days after the original attacks and totaling over 725 words in length that defended her trip to Europe. The op-ed ran beneath the headline “European trip a sound investment,” which aptly summarized her arguments. The piece defended Haley against *The Post and Courier*’s accusations and explained how South Carolinians might ultimately benefit from the business-recruitment trip.

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Haley's op-ed is significant to communication scholars for several reasons. First, its content places it firmly among numerous other instances of political *apologia*. Second, and more specifically, it refers to actions and events for which elected officials are frequently questioned. When political officeholders travel from their respective capitals, whether it is for vacation or for government business, constituents often ask questions about the cost and propriety of the trip. These controversies typically involve accusations related to whether leaders have shirked their responsibilities and whether taxpayer dollars were spent inappropriately.

The nature of elected officials' travel arrangements are a frequent *topoi* of political attack. Particularly relevant to Haley's case is that of former South Carolina Governor and now Congressman Mark Sanford, who raised eyebrows when he left the South Carolina capital for six days. It was later revealed that he was in Argentina, engaging in an extramarital affair (Brown & Dewan, 2009). President Barack Obama's political opponents have drawn considerable attention to the cost of his Christmas vacations to Hawaii (Gardiner, 2013). Notably, Obama offered no explanation or excuse for the trips. Local politicians are also the target of such attacks. For example, New York State Senator Eric Adams has been questioned frequently about an October 2011 trip he made to South Korea (Odato, 2013). There are certainly appreciable differences in the particular circumstances these individuals faced when their travel came under public scrutiny. Still, this rhetorical situation is of interest to communication scholars due to the frequency with which it recurs. This essay does not aim to evaluate the legitimacy of any particular junket, nor does it attempt to appraise the validity of concerns about junkets. Instead, this project recognizes that accusations related to the perceived propriety of political travel can pose a real threat to a politician's public image. Haley's op-ed response is particularly valuable to scholars because it represents a focused—and public—attempt to defend a political leader against accusations of unethical or inappropriate use of taxpayer dollars to travel.

This essay critically examines the attacks against Haley as well as the rhetoric Haley used to repair her image. First, we analyze *The Post and Courier's* "European Vacation" article in relation to Benoit and Dorries' (1996) strategies for enhancing persuasive attacks. Such an analysis produces a compelling account of the nature and scope of the accusations against Haley. Second, we apply Benoit's (1995) Theory of Image Repair Discourse to Haley's message to *The Post and Courier* and its readers. We identify the persuasive strategies Haley used to defend herself and we evaluate the merit of those strategies. *The Post & Courier's* message focused primarily on increasing the perceived offensiveness of Haley's trip, and Haley's response attempted to reduce that perceived offensiveness.

### Theory

The theoretical foundation for this analysis draws on two complementary bodies of literature – that which focuses on persuasive attack, and that which examines persuasive defense.

#### **Persuasive Attack**

Ryan (1982) effectively argues that in order to understand a given instance of *apologia*, one must understand the *kategoria*, or persuasive attacks, that encouraged it. Benoit and Dorries (1996) offer a valuable lens for studying the specific strategies that enhance persuasive attacks. Notably, the theory is compatible with Benoit's Image Repair Theory, described below. The attack strategies theorized by Benoit and Dorries belong to two distinct categories: Increasing perceived responsibility and increasing perceived offensiveness.

The first broad category of attack strategies are designed to increase the perceived responsibility of the offending individual. Specifically, persuasive attacks can: *Claim that the accused committed the act before; claim that the accused planned the offensive act; claim that accused knew the probable consequences of the act in question; and/or demonstrate that the accused party benefited from the act* (Benoit and Dorries, 1996). In order for an individual's image to be threatened, observers must perceive the individual as truly responsible for the offensive act. The second category of attack strategies identified by Benoit and Dorries concentrates on increasing the perceived offensiveness of an image-jeopardizing act. To this end, attackers may: *Establish the extent of the damage caused by the act; demonstrate the persistence of an act's negative effects; highlight the effects of the act on the audience; note that the accused party's act is inconsistent with their previous words or deeds; portray the victims of the act as innocent and helpless; and/or claim that the accused had an obligation to protect the victims of the act* (Benoit and Dorries, 1996). These strategies are important because only acts that are perceived as offensive can actually tarnish an individual's image.

This typology has been fruitfully applied to several high profile communication situations, such as media reaction to President George W. Bush's handling of Hurricane Katrina (Kelly-Romano & Westgate, 2007), the backlash against radio host Rush Limbaugh (Legge, DiSanza, Gribas, & Shiffler, 2012), and accusations of sexual abuse in the Catholic Church (Benoit & Stein, 2009).

#### **Persuasive Defense**

Benoit's (1995) Theory of Image Repair Discourse serves as the primary lens through which Haley's op-ed is analyzed here. Benoit relies heavily on the work of scholars such as Burke (1970), Scott & Lyman (1968), and Ware & Linkugel (1973) to identify 14 strategies that individuals or organizations can use when they are accused of wrongdoing.



First, individuals and organizations accused of offensive behavior may choose to deny the charges against them. This strategy has two variations. In one, accused parties *simply deny* having committed the act. In the second, accused parties *shift blame* for the act to another individual or organization. In some circumstances, these basic denial strategies may be sufficient to exonerate an accused individual of wrongdoing and successfully repair their image. Frequently, however, other strategies must be used instead of, or in addition to, denial.

Accusations of wrongdoing only pose a credible threat to an individual's image if that individual is regarded as truly responsible for a wrongful act. Not surprisingly then, a number of the image repair strategies that Benoit identifies attempt to evade responsibility for a questionable act. In fact, this strategy has four distinct variants. First, accused parties can claim *provocation* by suggesting that they committed an offensive act in response to some other act. Second, accused parties can use *defeasibility* to argue that a lack of information or ability played a role in the offensive act. Third, individuals and organizations accused of wrongdoing can assert that the act was an *accident*. Fourth, accused parties can claim that the act in question was performed with *good intentions* – the accused meant well. These strategies help accused parties avoid appearing responsible for an offensive act.

Whether or not an accused party is able to evade responsibility for an offensive act, it may also benefit them to reduce the perceived offensiveness of the act. There are six ways to reduce the perceived offensiveness of an act. First, *bolstering* can help people accentuate their own positive characteristics and deeds in hopes that they may overshadow the negative. Second, *minimization* downplays the act by claiming the act was not as awful as originally believed. Third, *differentiation* contrasts the act in question with acts likely to be seen as more offensive. Fourth, *transcendence* allows communicators to draw listeners' attention to other, more important considerations. Fifth, *attacking the accuser* can aid accused parties by damaging the credibility of the source of the persuasive attacks. Sixth, *compensation*, or reimbursing victims, can also help an accused party reduce the offensiveness of their act. All of these strategies operate on the assumption that an individual's reputation can only be harmed if the act they are accused of committing is seen as truly offensive.

*Corrective action* presents an excellent means by which accused parties can complement the strategies described above. This strategy requires that the accused party offer and implement a plan to either solve the problem they caused, or prevent it from happening again. In other words, corrective action can be understood as a way to make amends for perceived wrongdoing.

A final strategy available to parties who are accused of wrongdoing is *mortification*, which requires that an accused party take responsibility for an offensive act and offer an apology or expression of regret.

This typology has been productively applied to many political communication scenarios, including President Bill Clinton's response to allegations he had an affair with intern Monica Lewinsky (Benoit, 1999), President George W. Bush's discussions of the Iraq War (Benoit, 2006a; Benoit, 2006b), and his handling of Hurricane Katrina (Benoit & Henson, 2009), Speaker of the House Newt Gingrich's defense of his book deal (Kennedy & Benoit, 1997), President Ronald Reagan's rhetoric in response to Iran Contra (Benoit, Gullifor, & Paruci, 1991), and the entirety of Hillary Clinton's political career (Oles-Acevedo, 2012). Although Haley's defense does not rely on what Koesten and Rowland (2004) have called "the rhetoric of atonement," it is worth repeating Koesten and Rowland's contention that apologia serves important cultural functions beyond the simple restoration of an individual's image. Whereas Rowland found value in the grand curative function of apologetic rhetoric that aims to redress major ethical and historical transgressions, Governor Nikki Haley's rhetoric is of added value because it demonstrates how the image repair efforts of public figures who wish to appear accountable for their actions can fulfill a civic education function. The following sections proceed in chronological order. We first explore the attacks against Haley and then we examine how Haley responded to those attacks.

### **Attacks on Haley**

*The Post and Courier* article regarding Haley's trip to Europe employed numerous strategies designed to characterize the trip as an offensive act. Specifically, the article increased Haley's perceived responsibility for the act by claiming that Haley benefited from the trip, and increased the perceived offensiveness of the act by detailing the extent of the damage, noting that her actions injured the very people that elected her, and suggesting that the trip was inconsistent with Haley's stated commitments.

Much of the original *The Post and Courier* article was aimed at demonstrating that Haley, the accused party, benefited from the wrongful act. To this end, substantial portions of *The Post and Courier* piece focused on how lavish Nikki Haley's arrangements were while she visited Europe. The article notes that Haley used state funds to stay at luxurious hotels, eat fancy foods, and meet important people. In other words, Haley had a very good time and benefitted personally from her trip to Europe. The second full paragraph of the article notes that Haley, and her husband, stayed in "five-star hotels," sipped "cocktails at the Paris Ritz," ate French food at a "swanky rooftop restaurant" and "rub[bed] elbows with the U.S. Ambassador to France" (Dudley,

201, n.p.). As the very title of the article suggests, “European vacation or legitimate business?”, the article makes Haley’s trip sound like an extravagant romp through Paris during which she took every opportunity to spoil herself.

In a section titled, “More perks” (Dudley, 2011, n.p.), the article also noted that Haley and company used VIP access at the airport. Importantly, this section noted that Haley’s husband actually paid his own expenses, and that another dozen of the people in Haley’s entourage were members of economic development alliances that contributed substantial sums of money to cover the cost of the trip. In other words, the article was not wholly a smear piece against Haley. Still, the article does not paint a positive image of the Governor. To further drive home the idea that Haley benefitted from the European excursion, *The Post and Courier* article included a quotation from John Crangle, the director of a government ethics watchdog group in South Carolina. Of Haley and her associates, Crangle said, “They had a good time at the state’s expense” (Dudley, 2011, n.p.). Haley’s own Commerce Secretary is quoted in the article as saying of one scheduled event, “It was a great party” (Dudley, 2011, n.p.). Such statements are simple, succinct, and ultimately very damning.

*The Post and Courier* also tried to detail the extent of Haley’s damage by presenting several figures regarding how expensive Haley’s trip was. Every dollar amount provided by the article emphasizes the extent of the damage to South Carolina taxpayers. The very first paragraph of the article states that the trip, “cost South Carolinians more than \$127,000” (Dudley, 2011, n.p.). The article also claims that Haley spent \$25,000 of that on a “networking opportunity” (Dudley, 2011, n.p.) that each individual plane ticket for members of the delegation was \$1,530, and that Haley’s average nightly hotel bill was \$430. A sidebar to the article repeated these dollar amounts as an itemized list. Another section of the article, titled “Upgrading to compete” (Dudley, 2011, n.p.) noted that Haley spent \$112,000 at the Paris Air Show on a booth/chalet designed to compete with other governments to attract the attention of powerful business interests. The overall price tag for the trip, as well as the persistent repetition of numerous financial figures appears to highlight the extent of the damage and increase the perceived offensiveness of the act in question.

The “European Vacation” article characterizes the citizens of South Carolina as the victims of Haley’s offensive act. Careful analysis of the article reveals elements of two different *kategoria* strategies: portraying victims as innocent and helpless, and noting that the offending individual had an obligation to protect the victims. This strategy was made possible by a quote from South Carolina Democratic Party Chairman Dick Harpootlian, who said that Haley was “channeling Marie Antoinette” (Haley, 2011, n.p.). Harpootlian was further quoted as

rhetorically asking, “Has the average South Carolinian ever stayed in a \$650 a night hotel or spent almost \$4,000 in one week on airfare?” and charging, “[Haley’s] response to the people who footed the bill would be, ‘Let them eat cake’” (Dudley, 2011, n.p.). Such statements suggest that the people of South Carolina are financially disadvantaged and that Haley is cold and calloused to the well-being of the very people that elected her to serve them.

*The Post and Courier* article attempted to make the governor look inconsistent. Dudley (2011) wrote that Haley, “captured the governor’s office preaching fiscal restraint” (Dudley, 2011, n.p.). This statement, placed at the very beginning of the article, serves as the context through which the charges against Haley are interpreted. The article aims to make an expensive junket to Europe seem even more offensive in light of Haley’s campaign promises to cut spending in South Carolina. Although the article did not make frequent use of this line of attack, the charge is nonetheless incriminatory. The claim stirs the ire of readers by pointing to Haley’s apparent hypocrisy.

#### **Haley’s Defense**

Nikki Haley’s (2011) response, also published in *The Post and Courier*, was primarily designed to reduce the perceived offensiveness of her European business trip. Specifically, Haley bolstered her own reputation for attracting business to South Carolina, made statements intended to minimize the perceived extravagance and damage of the trip, and attacked her accusers.

A substantial portion of Haley’s op-ed is devoted to bolstering her efforts to create jobs in South Carolina. She boasts, “I spend a large part of every single day encouraging business to come to South Carolina.” She takes this line of argument a step further by claiming that she has had some success in this area:

I’m pleased to report that we’ve had a good deal of success this year, from Amy’s Kitchen bringing 700 jobs to Greenville, to Masonite investing \$14 million in Denmark, to recruiting Royal Bank of Canada to save the Heritage golf tournament in Hilton Head. (Haley, 2011, n.p.)

These comments attempt to reduce the perceived offensiveness of Haley’s trip to Europe by reminding readers that not only is job creation an important component of Haley’s gubernatorial duties, but that she’s pretty good at it. Importantly, this passage also attempts to reinforce Haley’s consistency. Whether at home in South Carolina, or on an overseas junket, Haley has established a record as a credible job creator.

In addition to recruiting new businesses to South Carolina, Haley’s job as governor is to maintain existing business relationships. Haley makes this apparent when she writes:

Aerospace and manufacturing play huge roles in South Carolina's economy: Boeing is a major employer and investor in our state, and it had a large presence at the Paris conference; BMW, another large employer in our state, has its headquarters in Munich. I would have been remiss in my duties as governor if I did not put South Carolina's best foot forward in those venues and meet with their key executive teams. (Haley, 2011, n.p.)

According to this account, Haley was obligated to meet with international business representatives in Europe; her trip to Europe was not optional.

One particularly interesting instance of bolstering suggests that Haley viewed *The Post & Courier* article as an attack not only on her reputation as a fiscal conservative, but her credibility as an authentic South Carolinian. Haley's op-ed recalled the accusation that she spent her trip dining on "delicious French cuisine," and then offered, "believe me, I'll take South Carolina barbeque any day over French delicacies" (Haley, 2011, n.p.). Such statements suggest that Haley was as worried about her image as an authentic down-home, everyday South Carolina resident as she was about her record on fiscal policy. In sum, the op-ed attempts to bolster her image as a humble country gal rather than a hoity-toity Francophile with expensive tastes.

Haley's op-ed to *The Post and Courier* also makes use of minimization to reduce the perceived offensiveness of her European junket. Haley wrote, "In my eight months as governor, I have taken one overseas trip" (Haley, 2011, n.p.). In other words, she does not make a habit of taking expensive trips to exotic locations. Furthermore, to hear Haley tell it, this trip was not as pricey as South Carolinians were led to believe. Haley argues, "we took care to cut costs," noting that the BMW Corporation provided "transportation for the majority of the trip" and "each participating South Carolina economic alliance contributed to the cost of the trip, thereby reducing state dollars" (Haley, 2011, n.p.). Had Haley not struck beneficial economic relationships with the aforementioned organizations, the cost of the trip would presumably be much greater.

Much of Haley's rhetoric falls can be correctly identified as differentiation. Portions of the original *The Post and Courier* article that attacked Haley suggested that the trip to Europe was a failure because it was not followed immediately by an announcement about new businesses coming to South Carolina. In her op-ed, Haley used differentiation to address these concerns. She claimed, "These things take time, and announcements cannot be made prematurely; otherwise, the deals will be sunk. So we have to do the hard work of negotiations over weeks and months, instead of the easy work of press interviews" (Haley, 2011, n.p.). According to this account, many governors might screw up a lucrative business deal by making premature announcements. Many governors might concern themselves primarily with self-aggrandizing

press conferences. These actions would presumably be far more offensive than failing to immediately publicize the positive outcomes of a business junket.

In an effort to reduce her accuser's credibility Haley attacked *The Post and Courier*. First, she stated that the "European Vacation" article "painted a grossly inaccurate picture" of the events in question (Haley, 2011, n.p.). Later, the op-ed accused the newspaper of frivolity, claiming, "It's fun for a reporter to write about an invitation that touts 'delicious French cuisine'." According to Haley's narrative, *The Post and Courier*'s Renee Dudley is guilty of writing to entertain her audience rather than inform them. Finally, Haley's op-ed revealed, "We invited *The Post and Courier* along to report on the entire trip and see for itself how we conducted ourselves. Unfortunately, it chose not to join us" (Haley, 2011, n.p.). This comment suggests that *The Post and Courier* failed to put itself in a position to most accurately report the details of Haley's trip to Europe. By extension, this piece of information also casts some doubt on just about everything else in the "European Vacation" article. By demonstrating that *The Post and Courier* was either sloppy or lazy at least once, Haley encourages readers to reconsider the trustworthiness of the news source.

### **Evaluation**

This section considers the quality of the rhetoric that each party – *The Post and Courier* and Nikki Haley – used in confrontation with each other. *The Post and Courier*'s persuasive efforts seem to have been regarded as credible. They succeeded in getting people to question Haley's junket, and more generally, her image as Governor. As powerful as *The Post and Courier* article was, Haley's response was rather well composed. She matched her defense strategies to the particular accusations in the original *The Post and Courier* article. Moreover, the mere fact that she offered an explanation or defense of her behavior should be regarded positively. Haley's op-ed demonstrated that she intended to remain accountable to the people of South Carolina and probably served to educate some readers about the role of junkets in state government.

*The Post and Courier*'s persuasive attacks concerning Haley's trip to Europe were generally well-constructed. The bulk of the "European Vacation" article attempted to increase the perceived offensiveness of Haley's trip rather than increase Haley's perceived responsibility for the trip. This was a wise choice because Haley's responsibility for the act had already been established. Haley, her husband, and other interested parties took a trip to Europe. That much could not be denied. Of course Haley was responsible for her own trip to Europe. It would be fruitless and perhaps even silly for *The Post and Courier* to waste words proving this point. Importantly, the "European Vacation" attacks discussed the ways in which Haley benefitted from

the act. Detailing the elite experiences in which Haley engaged was a useful strategy for suggesting that Haley could have had a personal, perhaps even selfish, motive for journeying to Europe.

Although Haley's responsibility for the act may have been immediately evident to South Carolinians, the offensiveness of the trip may not have been. Therefore, if *The Post and Courier's* goal was to attack Haley's image, they made the right choice by detailing the extent of the damage, charging Haley with inconsistency and reminding readers about the victims of Haley's expensive trip. Readers who might not think it strange that their Governor took a trip to Europe were reminded that this was no ordinary trip to Europe – it was excessive, and it was paid for by the taxpayers of South Carolina. Seen in relation to the image that Haley crafted for herself during the 2010 gubernatorial campaign – that of a fiscally conservative, no-frills leader – the trip to Europe probably appeared even more offensive. In fact, *The Post and Courier's* charge of inconsistency is probably the most damning attack against Haley. The trip to Europe was one of the first pieces of information made available to voters as they started to form opinions about Haley the Governor rather than Haley the candidate. The message was that Haley was guilty of hypocrisy. Thus, the charges in *The Post and Courier* threatened the entirety of Haley's image, not just the way citizens thought about her fiscal priorities or the nature of her travel arrangements.

Notably, *The Post and Courier* had a number of other factors working in its favor. Like many newspapers, *The Post and Courier* is regarded as a source of authority. Their antecedent credibility renders it very likely that readers would believe the accusations against Haley. National and local news sources referenced *The Post and Courier's* "European Vacation" article (Abad-Santos, 2011; Hawkins, 2011; Nikki, 2011; Post, 2011) and Haley's political opponents were ready and willing to repeat and develop the charges against Haley. In sum, there is little doubt that *The Post and Courier* succeeded in raising substantial doubts about Haley's trip to Europe. In fact, Haley's decision to issue a thorough response to the charges suggests that she and her administration took the attacks very seriously. *The Post and Courier's* *kategoria* constituted a genuine threat to Haley's image.

Haley's own rhetoric on the topic of her European junket should be regarded as a qualified success. Her decision to publicly address the accusations against her was prudent. Taken as a whole, *The Post and Courier's* persuasive attacks created an image of a Governor who was neither responsible nor accountable to the people of South Carolina. Had Haley decided not to offer an *apologia* on this topic, she may have only confirmed the image of an elitist politician who cares little for the concerns and interests of South Carolinians. In short, Haley's decision to

offer an *apologia* signaled her commitment to accountability, and her rhetoric served to reduce the offensiveness of the charge, since the heart of the *kategoria* was Haley's presumed lack of accountability.

From a theoretical perspective, Haley's message was well constructed. She appears to have tailored her image repair efforts to the concerns raised in the original *The Post and Courier* piece. Her op-ed is framed as a direct response to the "European Vacation" article, which she claims was inaccurate and frivolous in its reporting. Because the original *kategoria* focused so much on increasing the perceived offensiveness of the trip, Haley was wise to use the bulk of her message to reduce the offensiveness of the trip. When used in combination with one another, bolstering and differentiation construct an explanative posture (Ware & Linkugel, 1973). These strategies allow Haley to explain to audiences, in her own terms, the purpose and nature of her trip to Europe. Haley's decision to incorporate minimization complements the explanative stance, successfully tempering the most unpleasant elements of her junket.

Haley's choice to attack the accuser seems wise, too. This strategy is not explanative in nature, but it was nonetheless successful in reducing the offensiveness of the act in question. By discrediting *The Post and Courier*, Haley, turned the controversy into a he said/she said scenario. Audiences are forced to choose between the claims of a Governor they do not know very well and a newspaper that does not always use the best reporting practices. Not every citizen will choose Haley's narrative over that of *The Post and Courier*, but it seems that she successfully leveled the playing field.

Not only did Haley's op-ed serve her own image repair needs, but it may have served a valuable civic education function as well. In describing her trip to Europe, Haley also describes and defines the quintessential political junket. Audiences are presented with the ideal example of a worthwhile business trip that aims to benefit an officeholder's constituents. Thus, even if South Carolina residents reject Haley's account of events, they have been reminded of the function of political junkets. If audiences ultimately decide that Haley's trip was unnecessarily extravagant and wildly irresponsible, they are still reminded that responsible, constructive junkets exist and that there are good reasons for elected officials to occasionally travel away from their respective capitals. Further, this argument may also inoculate Haley from criticism of any future junkets in which she may participate.

If there is a weakness to Haley's image repair discourse, it is her inability to fully refute *The Post and Courier's* charges of inconsistency. During her 2010 gubernatorial campaign, Haley used themes such as fiscal discipline, accountability, and small government to build her conservative *ethos*. In a campaign ad titled, "Haley for Governor: Plan", she claimed, "if we cut



taxes and get government out of the way, we will create jobs” (Haley, 2010). Such statements are characteristic of her overall campaign rhetoric. This vision for South Carolina explicitly denied government a role in creating jobs. Not only did Haley’s trip to Europe suggest that government is responsible for attracting jobs to South Carolina, but so too did her written defense of that junket, which essentially characterized governors as job-creators-in-chief. Such a contradiction not only hurts Haley’s credibility with conservative voters who helped her win election, but also hints at a weakness in conservative rhetoric regarding economic development.

Notably, Haley’s inability to fully refute charges of inconsistency may also serve a valuable civic education function. Both the *kategoria* and *apologia* generated by the “European Vacation” controversy speak to an ongoing debate at the heart of American politics and economics. Generally, the question may be worded accordingly: What is the proper relationship between a society’s government and its economy? (Hahn, 2003). Variations on this question have been raised since America’s inception and persist in the rhetoric of contemporary political campaigns. The discourse surrounding Haley’s trip to Europe is valuable not only because it speaks to this debate, but because the ambiguities and contradictions inherent to such rhetoric ultimately leave this question unanswered. The exchange of attack and defense in the public forum of the newspaper pages affords voters the opportunity to weigh the benefits and drawbacks of political travel, for this instance and future instances of questionable junkets.

### **Conclusion**

The case of Nikki Haley’s “European Vacation” controversy is rather indicative of the rhetorical situation that politicians frequently encounter. The nature of American politics renders it incredibly likely that elected officials such as Haley will have to use image repair discourse at some point in their career. Opposing parties are always ready to attack each other for perceived wrongdoings and they make sure that accusations of offensive behavior remain on the public’s mind for as long as possible. The slightest slip or transgression can spell trouble for political leaders who are typically evaluated on their decision making abilities. For that reason, image repair strategies such as mortification, which would require an elected official to confess to poor decision-making, may not be viable options (Benoit, 2007). Ultimately, these factors render political *apologia* both pervasive and challenging.

This paper critically analyzed the rhetoric surrounding South Carolina Governor Nikki Haley’s European business trip. Haley successfully responded to the accusations that her junket was expensive and irresponsible. Her image repair efforts represent an excellent example of how accused parties benefit from understanding the precise nature of the attacks against them. Because the situation in which Haley found herself is rather common among elected officials, this

analysis should be of particular interest to political communication scholars and practitioners. Haley's discourse represents a successful attempt to explain the nature and purpose of political travel. Such a message is noteworthy in an age when political observers are quick to either forget, or willfully ignore that political travel can serve necessary and beneficial ends for leaders and citizens.

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## **A New Level of Experiential Learning: Mass Communication Students Role Play the Media in Military Exercises**

Judith G. Curtis & George B. Harrison

*Courses: Advanced News Writing and Reporting, Public Relations Case Studies, Crisis Communication, Broadcast Journalism, but implied pedagogical approach could be used for lots of experiential learning opportunities with the military*

*Objective: Students will apply journalism and public relations skills learned in the classroom by participating as mock media professionals in real-world military crisis exercises*

### **Theoretical Rationale**

Experiential learning activities for university mass communication students traditionally take several forms, such as internships, practicums, work on student publications, or student-run agencies (Keenan, 1992; Bush, 2009). Experiential learning encourages students to apply theories and skills they learn in the classroom to real-world situations. In addition to these traditional activities, Mass Communication students at the University of North Carolina at Pembroke take experiential learning a step further by partnering with the military during Department of Defense exercises where they role play the media during annual crisis simulations. In these exercises, students apply their classroom skills as they interact with active duty military personnel stationed at Ft. Bragg, North Carolina, home to soldiers of the 82<sup>nd</sup> Airborne Division.

As part of military preparedness exercises simulating crisis situations, public affairs officers test communications readiness in addition to operational readiness. In a crisis event, mass media descend on a location, expect press briefings, and demand answers. Military personnel need practice in responding to the media. For the past six years, when public affairs officers at Ft. Bragg look for mass media stand-ins, they look to UNC Pembroke mass communication students. Students experience the challenges of real-world media communications by participating in these experiential learning activities.

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Students in the Department of Mass Communication who are enrolled in courses such as Public Relations Case Studies, Advanced News Writing and Reporting, and Broadcast Journalism volunteer to participate. An interview process conducted by faculty members selects students based on their enthusiasm and ability to take their skills into the field. Public relations students see behind-the-scenes planning for press briefings; journalism students practice their skills in gathering information, writing stories, and shooting photos; and broadcast students shoot and edit video and capture sound bites. In some instances, students embed as media personnel, interview the troops and their commanders, and observe military objectives. Events in the simulations are fast breaking. Information becomes available in between news briefings. Students have to track down sources.

The department's objectives for student learning from these activities include applying classroom knowledge in real-world simulations, building first-hand knowledge of the field by interacting with professionals, and building self-confidence in students' abilities to become effective professionals. The military's objectives include assessing Public Affairs Officers' and Subject Matter Experts' abilities to operate effectively during a crisis, work effectively with multiple organizations, and prepare their personnel to deliver key messages to the public using mass media. Because the Department of Defense exercises prepare those conducting press briefings for unscripted, unrehearsed questions from the media, they need media role-players who will not be intimidated and will demand answers to tough questions.

During periods of wartime the relationship between the military and the mass media becomes strained as the mass media demand access to cover military operations while military leaders want to control the flow of information. The McCormick Tribune Foundation (2005) noted in a conference report that "although this relationship is often characterized by misunderstanding, these institutions have a common purpose at the heart of their operations: to serve the American public" (p. 7). In the conference report, then Army Brig. Gen. Carter Ham told the media representatives, "Give us feedback. Tell us what we can do to improve, to help us achieve what we hope in most cases is a mutual goal" (p. 29).

The McCormick Tribune Foundation (2005) conference report noted during the Iraq war "commanders were placed in the position of being spokespersons for government policy, which took them beyond their role of carrying out policy rather than making or promoting it" (p. 12). Then Army Brig. Gen. Mark Kimmitt told the conference: "In many ways, it's very different from the Army I grew up in, when hearing of a reporter anywhere within a square mile of your position usually caused you to find a reason to be somewhere else. Those days are over. Our leaders demand that we talk more to the press" (McCormick, 2005, p. 22). In fact, a Gallup Poll

commissioned by the McCormick Tribune Foundation in 2005 found 86 percent of military either strongly agreed or agreed that “military public affairs encourages military officers to speak with reporters” (p. 62).

From a pedagogical viewpoint, experiential learning activities, such as simulations, enhance student learning. The value of experience to learning goes back to Dewey’s *Democracy and Education* first published in 1916. Dewey (1966) made the point that “education is not an affair of ‘telling’ and being told but an active and constructive process” (p. 38). He wrote that education needs to involve fruitful activities that awaken “genuine discovery,” (p. 303) and he pointed out experience has implications beyond those first consciously noted.

Brandon (2002) summarized the future of mass media education as needing a “balance of practical and theoretical media coursework” (p. 61). Olson (2012) identified a number of studies showing active learning is beneficial to students and cited Kolb’s (1984) Experiential Learning Model explanation that “pursues a framework for examining and strengthening the critical linkages among education, work, and personal development” (p. 27). Brandon (2002) defined experiential learning as “a process during which a person experiences an event, acquires competencies, and then compares the knowledge gained with knowledge gained in similar situations” (p. 62).

Olson (2012) found that simulations help prepare communicators to respond to crisis situations. Her research focused on public relations students staging press briefings for a simulated client in crisis while journalism students acted as the media. Her research found that students came away from experiential learning with “valuable lessons that stay with them years afterward” (p. 25). During the simulation “ultimately, both PR and journalism students must think on their feet, make quick decisions, and look for clues to understand what is happening during the simulation” (p. 43).

Going beyond the classroom simulation, Bush (2009) described the effectiveness of establishing student-run public relations agencies where students experienced real-world situations working with clients. He suggested students benefitted from being in a professional environment, which helped build their professional identity. Students needed to apply critical thinking to on-going situations.

Olson (2012) observed that simulations occurring within an educational setting have students interacting with other students or with computers. Placing students in real-world simulations, such as partnering with the military during their exercises, takes experiential learning to a new level beyond interaction with other students or a computer. This real-world experience better meets the objectives of building the students’ professional identity while they apply the

skills they have learned in the classroom.

### **Activity**

Ft. Bragg is one of the largest U.S. military installations in the world and home to 51,000 soldiers of the 82<sup>nd</sup> Airborne Division. The fort and the division are separate entities with separate crisis training exercises, each requiring different needs of the students. The 82<sup>nd</sup> Airborne's training is called Joint Operational Access Exercise (JOAX). These exercises require students to serve as embedded journalists when the division stages mock deployments to crisis "hot spots" around the world. Conversely, Ft. Bragg's training is called "Orbit Comet." These exercises require students to serve as journalists during mock press conferences when a crisis event occurs on the post.

For example, in February 2013, when the U.S. Embassy in the small, fictitious Middle Eastern nation of Atropia was taken over by insurgents, the president ordered the 82<sup>nd</sup> Airborne Division's Global Response Force, the 2nd Brigade Combat Team, into action. During this JOAX, students were embedded with the troops for two days, helping to train brigade commanders and soldiers in media relations practices. Students interviewed soldiers and reported their observations as the brigade first made preparations to deploy. They later watched as 10,000 troops along with supplies, cannons, and vehicles dropped from planes to make a base from which to launch combat operations. Students then accompanied different companies of the brigade into the field as soldiers secured the area, cannon crews provided support for infantry, hostages were rescued, and evacuees were processed.

Military personnel from the Royal Canadian Regiment's 2<sup>nd</sup> and 3<sup>rd</sup> Battalions also participated and wanted one of the students to accompany them. The student stayed with the Canadians and watched them prepare for field operations, went with them into the field, took photographs, and interviewed soldiers.

Prior to this JOAX, the 82<sup>nd</sup> Airborne Public Affairs Officer met on campus with department faculty who later briefed the students. Faculty planned their syllabi around the simulation dates and encouraged student participation. Students received background information beforehand so they could prepare. To be embedded with the troops, students signed the same liability releases professional journalists are required to sign. The military provided helmets and other necessary gear. Students were responsible for packing and carrying their equipment in the field. In addition to reporter's notebooks, students took iPads, digital still cameras with video capability, tripods, and used iPhones as audio recorders.

This JOAX marked the fifth time in six years that students participated in crisis simulations with either Ft. Bragg or the 82<sup>nd</sup> Airborne Division. Following a Pentagon initiative



encouraging military installations to become more involved with their local universities, Ft. Bragg's Public Affairs Officer approached the department in 2006 to ask for help with the post's Orbit Comet exercise. This annual disaster simulation is one of the largest in the Department of Defense, typically involving personnel from some 26 federal, state, and local agencies, including law enforcement, safety, fire, rescue, hospitals, the Department of Homeland Security, and the FBI.

Between 10 and 15 students participate annually in Orbit Comet, and their role has increased over the years. The first exercise in June 2006 involved one day and one news conference. That has evolved into two days and multiple news conferences.

For example, in the 2012 Orbit Comet simulated disaster, a stolen aircraft sprayed poisonous gas over a populated area of Ft. Bragg, simulating 15 deaths and 90 injuries. The role playing began a week before the mock attack when students began receiving daily news releases in their e-mail based on mock FBI and Homeland Security reports warning of increased potential of terrorist activity. Later releases increased the alert level and warned of homemade bombs being found in nearby Fayetteville. The intent was to give the student press corps some awareness of events leading up to the mock attack. When the terrorists struck, the students received media alerts, began contacting the Public Affairs Office with questions, and ultimately attended multiple news conferences at Ft. Bragg where they role-played journalists prepared with questions and demanding answers for the news stories they wrote.

### **Results**

After the third Orbit Comet exercise, students were surveyed formally using a five-point Likert scale. Students viewed the experience positively with 95 percent choosing "strongly agreed" or "agreed" that participating in Orbit Comet was a valuable learning experience, and 70 percent said they would participate again. After the most recent JOAX exercise, students responded to a questionnaire where they described and evaluated their experiences. All students involved said they would participate again.

Typical of the student responses received after both the Orbit Comet and JOAX exercises, one student wrote: "I believe the exercise can help build great skills when it comes to working in the real world of journalism. There's nothing like getting out there and doing the job for real instead of just being at a desk in class."

Another student wrote: "I would do it any chance I could because this was one experience that I will never forget as a citizen or a journalist."

One student evaluated what was most valuable to her in taking part by responding: "It was something that was away from campus and allowed a completely different experience than

anything that we could do on campus. These people were not treating us like students so it was really a professional experience.”

A student embedded with the Canadian troops during the most recent JOAX exercise wrote that she enjoyed working with the Canadian troops because “they offered perspective outside of U.S. military life.”

Students were asked to identify the public relations and journalistic skills they used that prepared them the most for their activities. Students identified interviewing skills, observation skills, note taking, writing, photography, communication skills, and representing their university in a positive way. Several students commented that the experience took them out of their comfort zone.

Students generate different media products depending on the exercise. Public relations and journalism students write sample news stories based on the military news briefings. These stories are shared with the military planners so they can evaluate whether their briefings communicate the essential facts they want to convey to the public. Journalism students also write news stories and shoot photos about the event itself that are published in the student newspaper. Broadcast students shoot and edit video that is broadcast on the televised student news show. Faculty members use their own discretion to incorporate student participation in the exercise into their course curriculum. Most give extra credit and course release time for students, though one professor has included Orbit Comet as a mid-term exam. The exam requires students to successfully meet at least seven of nine activity criteria. As a whole, all department faculty members support and encourage student participation in these activities.

From the military’s viewpoint, the results are proving to be beneficial. Tom McCollum, Ft. Bragg’s Public Affairs Officer, said that the students involved in the Orbit Comet exercises do, in fact, help him to assess his ability to “operate effectively during a crisis, and to see how well we prepare our Subject Matter Experts and members of the chain of command to deliver key messages.” After the first JOAX, LTC David Connolly, the 82<sup>nd</sup> Airborne Division’s Public Affairs Officer, described the students who participated as “very helpful.” Connolly said, “We needed the students to bug us the same way real journalists would bug us, and they performed their role well. I thought we would have one or two who would want to go home after the first day or two, but every one of them stayed through to the end. They were awesome. It was fun, and we want to do it again.”

### **Appraisal**

These experiential learning activities meet Dewey’s criteria of fruitful activities involving genuine discovery. Students apply their existing knowledge in fast-moving simulations. Active

learning experienced in real-world settings further prepares these students to meet the demands of their profession with confidence in their abilities to perform. The students who participate are overwhelmingly positive about the experience.

There are limitations, however. The number of students who volunteer to take advantage of this opportunity is around 10 percent of the total number of department majors. Since there is an element of risk involved in the JOAX exercises, some students are reluctant to take part. Students who embed, for example, go on the same long marches to locations with the troops, carry their own gear, and camp out. That experience is not for everyone.

It would be possible to replicate this kind of experience in other contexts. The military is not the only organization that needs to prepare for crisis events or stages mock exercises. Other large organizations, such as hospitals, city and county governments, and electrical utilities stage drills. Universities with journalism and mass communication programs may consider approaching the public relations officers at those institutions to propose this kind of experiential learning opportunity.

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## **Introducing Students to Communication Studies Research: Flat Cat Theorizing**

*Courses:* *Communication Theory, Communication Research or any courses dealing with research methods in Communication Studies.*

*Objective:* *Students will learn about the processes of theorizing about communication behavior and recognize connections between their own daily theorizing and communication research.*

### **Theoretical Rationale**

The Flat Cat Theorizing activity has very little to do with cats. Even so, this activity is meant as a creative and engaging exercise to reduce undergraduate students' initial unease and apprehension about conducting original scholarly work. Therefore, this activity ultimately serves to introduce students to the processes of doing research in Communication Studies and building communication theory. Rancer, Durbin, and Lin (2013) describe teaching research courses as "a daunting task for both students and instructors" because of the anxiety students experience about them (p. 243). Rodrick and Dickmeyer (2002) suggest that the students' perception that theoretical concepts generally are challenging or irrelevant to their lives sparks their fear. Sells (2012) proposes that students feel overwhelmed when learning theory, let alone building theory, because they feel they lack the necessary skills to do so. By doing the Flat Cat exercise I argue that students come to see that the theorizing skills required in research processes are abilities they might already possess and enact in their own personal sense-making activities. Goby and Lewis (2000) suggest that such personal reflection helps "students link concrete experience to theoretical understanding" (p. 40). In sum, learning about theory building is an important aspect of research courses because of the role theory plays in guiding how researchers view, interpret, and predict communicative experiences (Bernath & Vidal, 2007; Pavitt, 2010).

Additionally, besides alleviating students' anxiety about learning and building theory, the Flat Cat Theorizing activity is designed to address an element that some scholars say is missing in theory and research courses. Mithaug (2000) and Swedberg (2012) argue that because instructors seem to emphasize the need to learn a field's theories, they have failed to attend to the processes of theorizing, necessary for creating theory and inspiring research.

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Swedberg (2012) explains, “The expression ‘to theorize’ roughly means what you do to produce theory. While theorizing is primarily a process, theory is the end product” (p. 2). Swedberg adds, “But to focus mainly on theory, which is what is done today, means that the ways in which theory is actually produced are being neglected” (p. 2). The goal of teaching theorizing, Swedberg (2012) writes, is to help students locate the theorist in themselves. By finding their inner theorist, students may become less anxious about research courses, more personally invested in their research, and more understanding of the role of theory in research. As Swedberg (2012) notes, theorizing requires imagination and personal reflection. “To theorize well you need to open yourself up, to observe yourself, and to listen carefully to yourself” (p. 34).

Swedberg (2012) proposes that the skills necessary for theorizing include observing an event, naming it, developing concepts about it, and turning the concepts into a theory that explains it. Mithaug (2000) describes a four-step theorizing strategy process:

- (a) defining the discrepancy between an existing belief and a circumstance, (b) finding reasons to explain the discrepancy, (c) evaluating the credibility and worth of the reasons and explanation, and (d) adjusting existing beliefs so that they are consistent with the new explanation. (p. 2)

Swedberg (2012) teaches theorizing by having students read a scholarly article, look for an interesting point, and free associate from that point to develop their own theory. Mithaug (2000) has students analyze and develop theories to explain social issues following the four-step theorizing strategy process. However, for undergraduate students who might find scholarly literature initially intimidating and for instructors who need to familiarize students with the theory and research process, the Flat Cat exercise offers a fun way to introduce students to and engage them in theorizing. Rodrick and Dickmeyer (2000) argue that “a teacher who can engage students, while alleviating their fears and resistance, will be more successful in helping students find value” in theory and research courses (p. 43).

### **Activity**

On the first or second day of class, instructors could bring a Flat Cat to class and place it in front of the classroom. A Flat Cat is a cardboard cat cutout, which can be ordered online. Alternatively, instructors could use any unusual, large, noticeable object not normally found in the classroom. For example, an unfamiliar poster or a large vase of flowers could be used. Again, the cat is not the point; the point is to have an unfamiliar object in the classroom to serve as the item students observe and then theorize about. The activity proceeds as follows.

1. Instructors should situate the Flat Cat (or alternative object) in the classroom before students arrive so they do not know who placed the item there.
2. Instructors should begin class as usual, without reference to the Flat Cat. If students comment about it before class begins, instructors should just shrug, give no response, or say something noncommittal like “who knows?” In other words, they should feign any knowledge of how the unusual object got there or its purposes.
3. After a few minutes, instructors should indicate some sort of shame or dismay at the object and ask the students to figure out what it’s all about. Instructors should ask students to pull out a sheet of paper and respond to these questions:
  - Did you notice the Flat Cat? Why or why not?
  - Why do you think it is here? What is its purpose?
4. After they have written down individual responses, instructors should have students organize into small groups, ideally of four to six students if class size permits. Alternatively, instructors could put students in dyads. Students should share their responses with the group or dyad and come to a group conclusion that explains the Flat Cat’s purpose.
5. After that group consensus work, instructors should have students individually respond to two more questions:
  - How was your explanation of the Flat Cat’s purpose similar to and/or different from your group members’ explanations?
  - What experiences in your own life and history influenced how you interpreted the Flat Cat’s purpose?
6. Instructors then ask each group or dyad to report their theoretical explanations to the class. Instructors should post the students’ “theories” about the Flat Cat on the blackboard or whiteboard.

### **Debriefing**

After the groups have reported, instructors should facilitate a classroom discussion on theorizing, drawing on individual and group responses to these questions:

- Why did you notice the Flat Cat?

Instructors should connect responses to this question to the initial process of theorizing; observation (Swedberg, 2012) or a “discrepancy” between what should or should not be in a classroom (Mithaug, 2000). Students could also theorize explanations for why they noticed the cat. How was the cat (or other object) discrepant from what usually appears in the classroom? Instructors should discuss the role that observation and noticing inconsistencies in

experience (or previously existing theories) play in research. Instructors should showcase that as students read literature or are developing research projects, they should look for “Flat Cats”—ideas or observations that catch their attention, discrepancies.

- What did you initially think when you saw the Flat Cat? What came to mind?

Instructors should relate responses to the next part of the theorizing process, naming/conceptualizing (Swedberg, 2012) or finding reasons to explain the discrepancy (Mithaug, 2000). Teachers should foster a discussion about similarities and differences among the group’s explanations and have groups reflect on how they developed their explanations. Instructors should also discuss how we—scholars and everyday people—constantly theorize as we attempt to make sense of our daily experience (Swedberg, 2012).

- How did the group discussion influence your explanation or lead to revisions of your explanation for the Flat Cat’s purpose?

Teachers should link responses to this question to continuing the theorizing process, broadening initial concepts into a theory (Swedberg, 2012) or assessing the credibility and worth of an explanation and adjusting beliefs (Mithaug, 2000). Instructors should discuss how adoption of a “new” communication theory changes how researchers “see” phenomena; at the same time, an explanation or theory might limit how researchers interpret experience. For example, Rufo (2012) notes that media researchers theorize about “social media,” but fail to consider how naming media “social” might influence how they see and study it.

- How might you confirm or test the Flat Cat theory you have developed?

Instructors should connect responses to this question to the next stage after theory development, research. Groups could brainstorm ways they could test their theories to support or reject them. Teachers should also point out the importance of doing a literature review in order to see if the theory has already been tested or to get ideas for revising the theory.

- How do you theorize in your daily life?

Instructors should ask students to reflect on their activities for the day and find examples of how they have theorized and list these on the board as they talk. For example, students might have theorized about why a car ran a red light, why a friend looked sad, or why the instructor asked them to pull out a piece of paper. Instructors should elaborate on the differences between personal and scientific theorizing. For example, students might not share their personal theories or share only with people who will agree with them. Scientists are expected to share their theories for peers to review, and scientific theory is a much more rigorous process that non-theoretically based, often *ad antiquitatem thinking*. Furthermore, students

might theorize based on one observation whereas scientists as well as rhetorical researchers theorize based on multiple observations and theoretical reflection (see Mithaug, 2000, for a detailed explanation).

Finally, instructors ultimately should link theorizing to the overall communication research process. Points to discuss might include:

- The kinds of experiences and behaviors about which communication scholars theorize. For example, a communication scholar might theorize about how discussions about the Flat Cat shaped their interpretation of its purpose or how people communicatively “framed” the flat cat.
- The purposes of theorizing. For example, communication scholars theorize to develop explanations regarding patterns of events, interpretations of those patterns, or predictions about “reality.” A social scientific research might predict that people who tell funny stories about the Flat Cat will do poorly, or quite well, on tests about theorizing. A rhetorical scholar might seek to explain how students talk about the Flat Cat. Thus, the debriefing should note the different purposes of theorizing emphasized by quantitative and qualitative approaches to research.

### **Appraisal**

Students tend to become quite engaged in the Flat Cat exercise and enjoy developing theories, especially if they have been encouraged to be as inventive as possible. Furthermore, the Flat Cat exercise provides a common experience that can be referred to later in the semester. For example, I often ask students to look for Flat Cats in the scholarly articles that they read. In general, students seem more relaxed about theory discussions because they can link the research process to the process they experienced with the Flat Cat exercise. The exercise helps them become more aware that the research process is an extension of their daily sense making.

One limitation is that some students hesitate to share their theories, especially if they perceive that their explanations might offend the instructor. For example, students often are reticent to say that they theorize that the instructor is a “crazy cat lady!” One student was timid about sharing her theory that she had hallucinated the Flat Cat. However, having them work in groups usually overcomes their reluctance. Another limitation is that students tend to limit theorizing to teaching or observation-testing explanations. But this can spark discussion about how the educational environment context frames their view of and theorizing about experience. Also, conversation can turn to asking why human beings theorize generally. Instructor could possibly conclude the lesson by discussing how the very act of the Flat Cat exercise is based on a theory that students need to learn theorizing.



As noted, alternative objects can be used, which can broaden topic discussions. For example, sometimes I have used a rainbow-colored flag with the Italian word “Pace” (peace) on it, which was used in some 1990s Italian peace demonstrations. This object prompts students to theorize about “Pace,” the flag’s colors, and the flag’s use. Regardless of the object used, the exercise goal remains the same—to reduce student anxiety about theory and research by helping them find their inner theorist and see connections to the research process. With such an introduction to the process of research students will be encouraged to start their journeys toward excellent original scholarship.

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