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Return to Tamara-Land: A Methodological Exploration of the Antenarratives of Tyrannic Capitalism

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Abstract

This article proposes a novel methodology, the “Tamara-Land tableau vivant” to analyze the twisting and turning antenarratives of corporate raiders. We adduce Nelson Pelz because of his notoriety in hostile takeovers of multibillion dollar companies. This article focuses upon two organizations which were targeted by Mr. Pelz—the Coalition of Imokloawee Workers (CIW) and Disney. The Tamara-Land tableau vivant is utilized to explain ways in which Pelz manipulates his stakeholders via competing antenarratives to create novel stories that control his growing portfolio of corporate acquisitions. Scholars of corporate governance, narratives, and worker’s rights will find this article of interest.

Keywords

corporate governance, antenarratives, Tamara-Land, narratives

Introduction

Literature, particularly fiction, has a remarkable way of providing explanations that may be hidden when using mainstream methods (Holt & Zundel, 2018; Kalkman, 2024). Humanities scholars frequently use literature as well as literary analysis as robust sensemaking devices (De Sade & Uzanne, 2016; Pelly & Fayolle, 2022). Even colloquially, most people use references to famous stories as a way to connect the dots and provide unique understandings when statistical analysis falls short. No only do

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literary metaphors provide sensemaking in a remarkably coherent way, they provide room for others to “converse” with the literature in such a way that readers can add their own meaning and derive their own lessons from the relationship between a phenomenon and the literature used to describe it.

This article builds upon these literary traditions by using the play *Tamara* as a means to analyze the complex interplay among antenarratives that inhabit the world of Nelson Pelz. There is no true empirical way to assess antenarratives due to their ontological (in lieu of ontic) nature (Freeman, 2014; Stolorow, 2013). However, composing a narrative allows authors to better understand how competing antenarratives become reified into stories (or grand narratives) and actions since “words lead to deeds” (Gartner, 1993). The study of antenarratives shuns empirical verification in favor of highlighting the plausibility of an explanation (Pelly & Fayolle, 2020). In this paper, we will explore how the Tamara-Land tableau vivant can explore competing antenarratives as a way to better understand the undercurrents of manifested actions. **[AQ: 3]**

Before introducing the Tamara-Land tableau vivant, a brief literature review is provided, describing similar orientations in communication studies. These include systemic storytelling, engaged reflection, embodied storytelling, and engaged scholarship. As explained, these orientations have value, especially with respect to engaging practitioners into academic theorizing, but fall short in that both lenses rely upon an academician “expert” who provides the necessary interpretations.

Following the literature review, we introduce the Tamara-Land tableau vivant. This discussion includes a summary of the play, *Tamara*, and explains how multiple rooms create a cacophony of competing antenarratives that can obscure sensemaking. We conclude the methods section by explaining ways in which *Tamara-Land* can explore the competing antenarratives and provide a deeper understanding through literary analysis than would only the study of visibly manifested actions.

After the discussion of antenarratives, we dive into the story of Nelson Pelz and his conflict with the Coalition of Immokalee Workers (CIW) and Disney. We use quotes interspersed with discussions of the different antenarratives manifested to show that Nelson Pelz was able to circumvent the CIW, but crumbled to Disney. The final section is a brief discussion and conclusion. The goal of this paper is to explain how a novel method, the Tamara-Land tableau vivant, can provide new insights into management. Although this empirical setting focuses upon Nelson Pelz, it is our belief that this technique can be applied to other managerial settings to reveal new insights and to empower readers to make their own conclusions.

Reader-Author Interaction in Communication Studies

Communication studies allow readers to participate in sensemaking (see Hermann, 2020, for additional discussion). Perhaps one of the most significant factors that contributes to the Cartesian-Newtonian gulf between readers and writers is the lack of methodology that bridges the fourth wall (Schlütz et al., 2020). In other words, readers are separated from the phenomenon described in academic research in the search for objectivity (Pelly, 2017). However, some scholars have made progress toward

inclusivity with their audiences. In this section we will overview some of the approaches in communications studies that paved the way for the introduction of the Tamara-Land tableau vivant. The petitions for this style of academic writing stem from a desire to improve society in lieu of simply writing for academic journals (Carragee & Frey, 2016; O’Hair, 2000; Petronio, 1999). Moreover, the wedge between writer and reader further isolates practitioners from peer-reviewed publications (Barge, 2001; Tourish & Barge, 2010). Systemic storytelling, engaged scholarship, and embodied storytelling are examples of author-reader sensemaking in academic writing that will be addressed in the following paragraphs because they partially bridge this divide.

One proposed solution to the theory-practice divide is engaged reflection, which advocates interaction between theory and a specific situation (Craig, 1996). This style of writing eschews an objective truth in favor of situational veracity (Foot, 2002), bridging the duality between theory and practice and activating community action (K. A. Pearce & Pearce, 2001; Ream et al., 2015; Simpson, 2005). Ideally, this type of writing influences real-world processes of organizing and impacts political processes (Anderson et al., 2001; Aram & Salipante, 2003; Shapiro & Rynes, 2005; Simpson & Schockley-Zabalak, 2005). Despite the bond between theory and practice, this style of writing guides readers to the authors’ recommended courses of action. **[AQ: 4]**

Engaged scholarship builds upon engaged reflection, and is defined as collaborative inquiry between academics and practitioners, whereby both groups are valued for their ability to dialectically illuminate an uncertain object of inquiry (Van de Ven & Johnson, 2006). It encourages stronger links between theory and practice through scholarly writing, and invites practitioners to become active co-authors in the writing process (Barge & Shockley-Zalabak, 2008). It also utilizes multidisciplinary perspectives to tackle big questions (Van de Ven & Johnson, 2006), which can be more intellectually stimulating to practitioners (Caswill and Shove, 2000). Moreover, it entices scholars to actively participate in the communities they research (Barge, 1994; Cheney et al., 2002; DeWine, 2005; Tracy, 2002). Although engagement with practitioners provides enhanced interaction between theory and practice via intertwining perspectives of writers with divergent experiences, it still relies upon authors who are considered “the experts,” and omits reader agency.

On the other end of the spectrum is systemic storytelling which maintains that consultants and academicians enter the language structure of the client to respect varying stories of individuals within an organization (Barge, 2004). The systemic story is born from tensions between “stories lived” and “stories told” (W. B. Pearce, 1994; W. B. Pearce & Pearce, 1998). It dictates that individuals acknowledge the multiplicity of stories within an organization as opposed to a grand narrative (Barge, 2004); and it directs the researcher to take the stance that solving conflicting interpretations among these stories is crucial.

This embodied storytelling is redolent of Grint’s (2005) situationist approach of leadership which arises from co-constructed stories among people, topic, linguistic practice, and time. Although these stories are interesting from a consultative perspective, particularly with respect to the theory-practice helix, they encounter the Socrates

paradox: the successes and failures of systemic storytelling are only recorded in organizational memory as a “narrative echo” (Pelly, 2016), and are not scribed into academic journals; thus, they lack space on the margins for others to pontificate both within and outside the context of the writing. Moreover, there is an unequal distribution in the balance of power between client and consultant in that the consultant may exercise authoritative voice which paves the way in which the new story is told (Tourish & Pinnington, 2002). As authors of this paper, we as academicians write in a fundamentally different way to encourage readers (irrespective of if they are consultants who solve business problems, or practitioners who are simply intellectually curious about Pelz or *Tamara*) to penetrate the fourth wall and become co-authors in co-constructed sensemaking. A methodology and accompanying orientation are needed that consider the reader as an active participant in the sensemaking process—one that blends literature with fact to reveal the antenarratives otherwise obscured by more mainstream methods.

Method: Wandering From Room to Room With Nelson Pelz: A Revisit to Tamara-Land

In this section, the story of *Tamara* is explicated followed by an illustration of its accompanying microstoria. Ways in which these microstoria can be used to highlight antenarratives are introduced. In addition, an overview of Tamara-Land in other writings is reviewed; and, ways in which the Tamara structure has been used in reality television is discussed. The purpose of this section is to provide the foundation of the *mise en abime* (Collier, 1989; Lawlor, 1985)—it will explain the method so that the story of Nelson Pelz is easier to follow as a demonstration of the Tamara-Land tableau vivant.

Boje (1995) introduced the concept of Tamara-Land as a tool to delve into the domineering behavior of Walt Disney. This return to Tamara-Land is apropos because we are introducing a similar series of behaviors of Nelson Pelz, and because Disney was the subject of Tamara-Land and Pelz’ corporate raids. Moreover, “*Tamara*” as well as Boje’s adaptation of Tamara-Land to corporate settings, focuses upon organizational polyphony and the ways in which actions within a particular space can be controlled by meta actors (Boje et al., 2022). In Boje’s Tamara-Land, Walt Disney was the reincarnation of Mussolini—a man who controlled the master narratives in a perversion of the stakeholder model (Barge, 2004; Pelly et al., 2023).

Tamara is Los Angeles’ longest running murder mystery dinner theatre whereby the audience engages in a flaneur-style (Berdet, 2012) of circumambulation in a luxurious mansion during 1927 (see Figure 1). In *Tamara*, the audience follows actors and co-creates stories across a polyphony of simultaneous stages. The overarching narrative of *Tamara* is to enthrall the audience in the debauchery of the art deco era. A major element of the grand narrative is that Gabriele d’Annunzio, a war hero, poet, patriot, and womanizer is under an opulent confinement at the order of Mussolini, who feels threatened by d’Annunzio’s fame and influence. The Polish

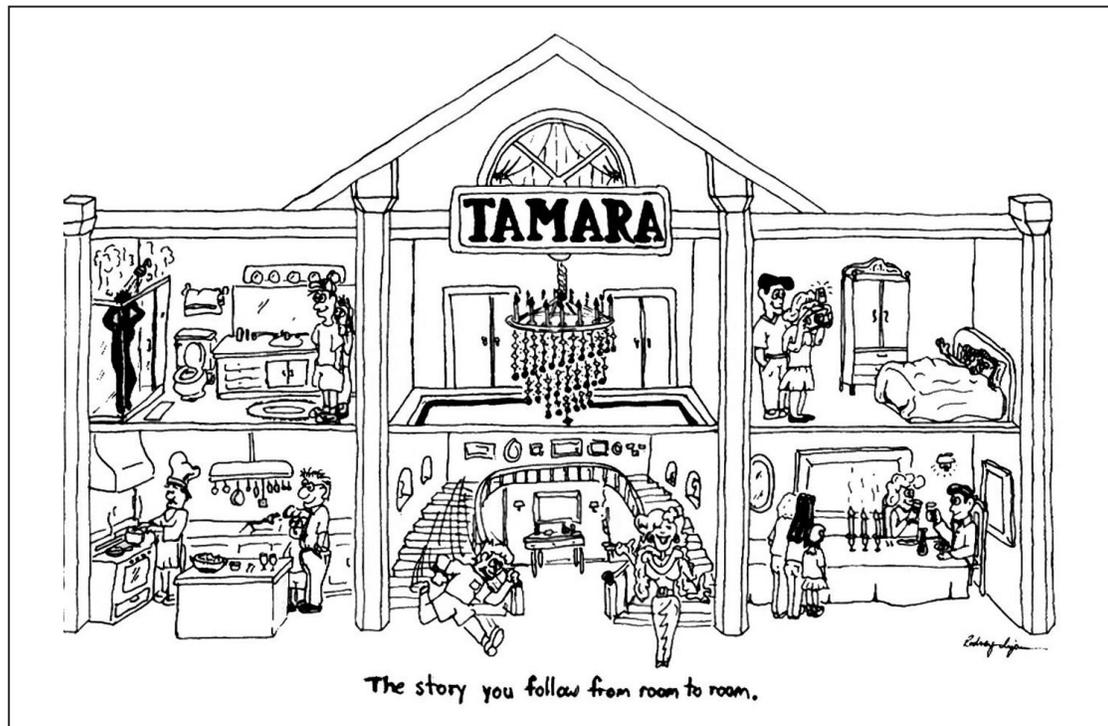


Figure 1. An illustration of tamara-land (from <https://davidboje.wordpress.com/2015/08/23/the-idle-talk-antenarrative-how-disneyland-is-dismaland-blog-aug-23-2015-david-m-boje-ph-d/>).

painter and socialite, Tamara de Lempicka, is invited to the house to paint d'Annunzio's portrait. The interplay creates polyphony between the characters and audience to obfuscate meaning as the audience meanders along the timeline of the antenarratives and characters they select.

The lack of order in which cognitive-reflexive audience members wander through the play dramatically impacts their ability to understand competing subplots to find the murderer while appealing to embodied-multiplicity, so that members can draw their own conclusions without focusing upon the final act. *Tamara* demonstrates the importance of competing antenarratives, because every subplot chosen by an audience member provides a limited understanding of fascism practices. Fragmented understandings have a more profound embodied-meaning for audience members than being spoon-fed authorial coherence. Alternatively, the fragmented antenarrative of Tamara-Land empowers the audience to make connections and relate to their own story based upon their own rationality (Pelly et al., 2023).

Boje's goal was to use microstoria to wander from room to room in a Tamara-Land fashion to explore antenarratives (Boje, 1995). We use Boje's definition of antenarrative in this paper, which is a simultaneous beneath, before, beyond, between, becoming, and bet (Boje et al., 2022). In layman's terms, the antenarrative is the antecedent of action—it may not only be before, but it is the train of thought concurrent to an action. Antenarratives revolve around abstractions of moral, mathematical, or logical

thought, such as eternal objects (Pelly, 2017). The basis for antenarratives can include various interpretations of raw values such as courage, curiosity, caring, etc. These raw values then are interpreted via antenarratives and form the basis for action. Antenarratives are the trains of thought that lurk behind the masks that people wear in the public sphere.

Our article incorporates microstoria from interviews, corporate data, and the media to analyze antenarratives (and the values that underly them) and show how they can reveal insights obscured by more conventional methods. We will also describe how the antenarratives and their accompanying values reflect the interview data we have chosen. The vignettes delve into the actions of Pelz and the ways in which he justifies his actions. The goal of this analysis is not to “prove” correctness of our assessment nor support or condemn Pelz or any other characters in the story, but rather to show potential validity of our interpretations so they may be extrapolated to analogous cases. In other words, particular actors are not described, but rather a series of processes and antenarratives is revealed. These vignettes were not chosen to create a clear A to B process, but rather to help the reader feel the cacophony of voices in Pelz’ world. Much like certain rooms are selected in the play *Tamara* to tell a story, we also wandered among Pelz’ antenarratives to highlight key themes found across his stakeholder groups. Due to methodological constraints, most writings on organizational change do not explain the complexity of antenarratives other than the few exceptions detailed in the following paragraph. Our definition of antenarratives highlights the inherent complexity, un-resolvability, and unfinalizability of unmerged voices that continue to stand their ground, never progressing to agreement.

Tamara-Land has been utilized in follow-on studies of competing antenarratives (i.e., Boje et al., 2022; Boje & Rosile, 2019; Pelly et al., 2023). In each study, the reader is invited to wander from “room to room” or from passage to passage. *Tamara* is an ideal analogy for reality, since each of the rooms in the play illustrate the complexity of competing antenarratives that describe reality (Boje et al., 2022). Embracing these “petit recits” (Derrida, 2002) allows us to capture internal monologues and fantasies, in order to deconstruct a story, instead of supporting a grand narrative (Pelly & Fayolle, 2020). These alternative mental avenues prioritize process over endpoint (Hernes, 2014), facilitating generalizability and relatability of a text, because studying antenarratives switches the expertise from author to reader; in other words, readers draw their own conclusions by interpreting and choosing among antenarratives, much like an audience experiencing *Tamara* (Boje, 1995). Switching the expertise to the reader is important in the study of antenarratives, since “what not to do” is frequently more relatable than grand narratives of success (de Sade & Uzanne, 2016; Pelly & Fayolle, 2022).

This particularity of antenarrative analysis is found not only in *Tamara* as aforementioned above, but also in reality television. Consider your favorite episode of “90 Day Fiancé” or “Jersey Shore.” In these television shows, the grand narrative is portrayed in “real time,” much like the grand narrative of *Tamara*. However, the grand narratives are interspersed with studies of antenarratives (known in reality tv as “cut scenes”) in which the different characters comment upon a particular aspect of the

grand narrative. Cut scenes describe the characters' hidden emotions, hopes, introspections, and struggles—in short, their antenarratives. In this article, we use the tableau vivant to wander through narratives to compare the grand narrative composed by Pelz with those proffered by the CIW and Disney. Of note is that Pelz and Trian partners show an antenarrative of strength, while the antenarratives at Disney seek to deny Pelz power.

A mise en abyme (Collier, 1989; Lawlor, 1985) illustrates the Tamara-Land tableau vivant methodology in action by actually performing the method. The vignettes oscillate between the stories of Nelson Pelz, the CIW, and Disney. These will be juxtaposed with the use of the Tamara-Land antenarratives analysis. Vignettes with *italics indicate* storytelling vignettes and vignette titles in **bold** indicate the vignette provides the analysis. The first and last sentences of each vignette are provided below their titles for context. The full vignettes are listed in the appendix of the paper. Our next section begins the interweaving vignettes of the Tamara-Land tableau vivant.

Vignette 1: Pelz' Origin Story [AQ: 5]

I grew up in a middle-class family in Brooklyn. My father had a produce and frozen food distributorship right in lower Manhattan, the old Washington market. And it was doing about two million dollars a year in total volume. . . I think, what, what people don't understand is (pause .3 seconds) that we are making their portfolios better (Bloomberg Wealth with David Rubenstein, 2022).

Pelz as a “Curious” Investor

Pelz' antenarrative of curiosity significantly grows his father's business, encourages family and friends to invest, takes the business public and serves as its largest shareholder, and ultimately sells the business at a profit. In these Tamra-Land “rooms” of Pelz' story, he projects the role of experimenter, effectuator (Sarasvathy, 2001), and a tinkerer. Thus, he enriches himself, his network, and his companies.

Pelz further demonstrates curiosity by investment acquisitions and divestures, prior to founding Trian Partners hedge fund. Our next vignette pair introduces his attempt to squelch the competing antenarrative that he is an activist investor.

Vignette 2: We Are Not An Activist Investor

We are not an activist investor. . . But if (.5 second pause] if they refuse to then we make that white paper public. (Bloomberg Wealth with David Rubenstein, 2022)

Gaslighting a Competing Narrative With an Alternate Antenarrative

Pelz couches his activist investor label under the catch phrase “I like to fix things,” and uses these semantics to counter criticisms made regarding “activist investors” and

hedge funds. An activist investor is defined as an individual or group that becomes a large shareholder in a public company with the goal of influencing how this company is run (Martin & Nisar, 2007; DesJardine & Shi, 2023). Activist investors are heroes of stakeholder capitalism who use board seats, cost cutting, and layoffs to increase shareholder dividends and shake up management.

Pelz uses a competing antenarrative to “gaslight” the story. When he is confronted for his investor activism, he removes the label and tells a counter story comprised of many “antenarrative” rooms that obfuscate meaning and allow him to dismiss the criticisms. This is a technique frequently used by consultants and technocrats to demonstrate expertise and moral compass (Boje et al., 2023; Pelly, 2019) [AQ: 6]. His last sentence hints at the consequences if others stand in his way.

To reify his antenarrative, and subsequent counter narrative, Pelz refers to the white paper and threatens it as a legal form of blackmail (Trian Partners, 2024). He uses the trope of a hero on a white horse coming to save a corporation. In lieu of accepting the label of activist investor, we see Pelz as a corporate entrepreneur, an agent of business transformation (Stopford & Baden-Fuller, 1994), and/or a narrative entrepreneur who sees an anomaly and creates a plan of action (Spinosa et al., 1999).

Vignette 3: Episode: Trian Partners’ Founding Story and Wendy’s

Well, we started Trian Partners in 05. Before that I was buying companies like you did, not with a fund but with vehicles or with capital that we can cobble together. . . We, we had a proxy fight and became very fast friends, which usually is what happens (Bloomberg Wealth with David Rubenstein, 2022).

A Combination of New Antenarratives

In the aforementioned vignette, Pelz presents himself as the “benign” and curious investor, acquires and improves profitability of his acquisitions. He uses an alternative antenarrative to recharacterize the hardships resulting from his actions as needless conflict. He asserts that his efforts were so benevolent that his acquisitions ultimately resulted in friendships with his former “victims.” The next two vignettes depict how far Pelz will go with respect to harming others.

Vignette 4: Pelz’ “Secret Life” Antenarrative

Pelz also owns a 27-room mansion on a 130-acre property in Bedford, New York, that in 2009 was reported to feature “a lake, waterfall, indoor hockey rink with Zamboni machine, and a flock of albino peacocks that can occasionally be seen running around the manicured grounds”. He has been reported to own two matching jets, and he used to take a private helicopter to work before his neighbors in the Town of Bedford, upset with the noise, succeeded in stopping him (Seidman, 2019).

Vignette 5: His Wife Claudia Shames a Butler

We hear Mrs. Peltz summoned a butler to the master bathroom after she discovered drops of urine on the toilet seat. . . To exemplify, even his daughter adopts the assertions of her parents – that people simply do not matter.

A Hidden Antenarrative

The two proceeding vignettes provide an antenarrative that contradicts the story that Pelz would like to share with the public. In lieu of his calm, collected public persona that emphasizes an Adam Smith (2016) style of corporate responsibility that highlights the importance of profit making as an ethical way to promote production, employment, and shareholder value, this antenarrative portrays a man who leads a much darker family life. This hidden undercurrent depicts him as a Sadist who focuses on ownership and possession as his ultimate goal (Pelly & Fayolle, 2022)—whether that be control of his housekeeping staff or of companies. Even his family seems to be a part of this particular form of control.

Vignette 6: Pelz, CIW, and Wendy's : Origin Story of the CIW

This is just a faster death.

Real, profound change was not only necessary and just, it was in fact possible. (CIW, 2017).

An Origins Story Riddled With Fear

In its origins story, the CIW expresses an antenarrative of fear. CIW workers explain that, without the ability to organize, they lose control over their fate. They know that they will either die in the fields or they will die from hunger.

CIW's campaigns to persuade McDonald's, Burger King, and other food service providers to join the Fair Food Program took years. Now that there is worker-driven social responsibility, it appears that the relationship between CIW and these providers is mutually beneficial. Despite the benefits, Wendy's, Kroger's and Publix have continued to avoid CIW and its Fair Food Program.

The vignette above shows an attempt at an integration based antenarrative as depicted by Pelly and Boje (2019). The successful history of this antenarrative is depicted in Figure 2. The CIW attempts an act of synthesizing others' antenarratives into a mutually beneficial final story. To illustrate, the CIW understands the economic motivation of the corporations above, but believes treating workers with respect will lead to shared economic outcomes. Surprisingly, some companies refuse human dignity at the cost of economic gains.

Vignette 7: Two Faced Antenarratives?

A significant percentage of the \$10 billion in assets that Trian oversees comes from clients like union members' pension funds, liberal universities, and progressive nonprofits and

Start date	Corporate agreement with CIW
2005	Yum! Brands (Taco Bell, Pizza Hut, KFC)
2007	McDonald
2008	Burger King
2008	Whole Foods Market
2008	Subway
2009	Bon Appétit Management Co.
2009	Compass Group
2009	Aramark
2009	Sodexo
2012	Trader Joe's
2012	Chipotle Mexican Grill
2014	Wal-Mart
2015	The Fresh Market
2015	USA Hold (Giant, Stop & Shop)
2017	Ben & Jerry's

Note. CIW = Coalition of Immokalee Workers.

Figure 2. CIW's history of forming corporate agreements (adapted from Rosile et al., 2021).

Note. CIW = Coalition of Immokalee Workers.

foundations — all of which might be upset to learn that their money is propping up a Wall Street billionaire who refuses to do right by low-wage farm workers (Seidman, 2021).

The Antenarratives of Care and Understanding

The CIW articulates different antenarratives that revolve around care and understanding (as extrapolated from Figure 2). Care is shown by the CIW and the socially responsible players aforementioned above, via their advocacy for basic norms of human decency in the workplace. CIW presents themselves as caring champions of workplace dignity, and the quote above implies that the clients of Trian would have antenarratives that better align with the CIW than with Pelz.

We contend that CIW and Peltz have different ideological voices, profess polemized characterizations of one another, and declare contradictory philosophical stances similar to the multiplicity of antenarratives found while meandering through the rooms of *Tamara*. This multiplicity all but destroys the possibility of a monological execution of business storytelling. Despite the hopes of the integration-based antenarrative as mentioned above, there are no shared antenarratives that adjudicate the sustained opposition of CIW and Peltz, despite Pelz' attempts to create the master narrative.

To elucidate, CIW wants Wendy's to join its Fair Food Program, representing antenarratives revolving around understanding, caring, and fear. Peltz shuns the CIW through the antenarratives of assertion, and curiosity. This juxtaposition will be demonstrated in the following vignette. Select third person narrations among the quotes are included for purposes of clarity.

Vignette 8: Food Fight: Pelz Versus CIW

Wall Street firm Trian Partners - headed by billionaire Nelson Peltz – effectively owns Wendy’s. . . . This also means that Pelz is able to circumvent the antenarratives of the CIW by claiming his own antenarratives do not intersect or conflict with theirs.

Control Through Ambiguity?

What is the result of Pelz’ antenarratives of curiosity, and assertion over Wendy’s? He is now at the center of close-knit family and partnership ties that result in seven seats on Wendy’s board of directors. Those in his circle solidify around the antenarratives of assertion and curiosity. This complexity of competing antenarratives is illustrated in Figure 3—which bears an uncanny resemblance with the Tamara-Land illustration in Figure 1. Pelz uses his antenarratives to create an oligarchic control via a hedge fund that dictates Wendy’s administrative and investment decisions. In parallel, the pension retirement funds, and liberal nonprofits and foundations have recently become cognizant that Trian/Wendy’s refuses to respect low-wage farm workers. These behaviors mirror a Janus coin with two faces—ambiguity becomes the antenarrative between Pelz and his investors because the master narrative becomes difficult to pinpoint, which serves to empower Pelz. This ambiguity is complicated because the multiple rooms of *Tamara* reinforce an ever more complex cacophony. Describing the master narrative is akin to identifying a matryoshka doll—it depends upon which room/doll you are observing at any given moment. See Figure 4 for an illustration of Wendy’s Tamara-Land, which bears a striking resemblance to Figures 1 and 3.

Corporate raiders and social movements have their own antenarratives. CIW repeatedly expresses fear for workers in corporate supply chains who have experienced modern day slavery. The fear of slavery practices is rampant in Wendy’s corporation’s supply chain, particularly in agriculture.

CIW further presents an antenarrative of anxiety by expressing incredulity about Wendy’s and Nelson Peltz. For example, Wendy’s switched its supply chain sourcing of tomatoes from Florida to Mexico. The excerpt in the following vignette is from CIW’s 2017 posting that depicts an attack rooted in anxiety.

Vignette 9: Anxiety Masked in Pigtails

Behind the mask of the friendly little girl with red pigtails, there is one man more responsible than any other for Wendy’s failure to join the Fair Food Program: Multi-billionaire and hedge fund mogul, Nelson Peltz. . . . In addition to his \$123 million Palm Beach estate, Mr. Peltz and his partners at Trian are expanding their Palm Beach office—and on Saturday, April 2 the Fair Food Nation will be there to greet them! (CIW, 2022)

A Tale of Conflicting Antenarratives

Pelz refuses to engage with the CIW, creating a gulf between antenarratives by transferring tomato sourcing to Mexico. Tales of sex abuse, wage theft, and physical abuse were rampant in the new facilities. When CIW used an antenarrative of understanding

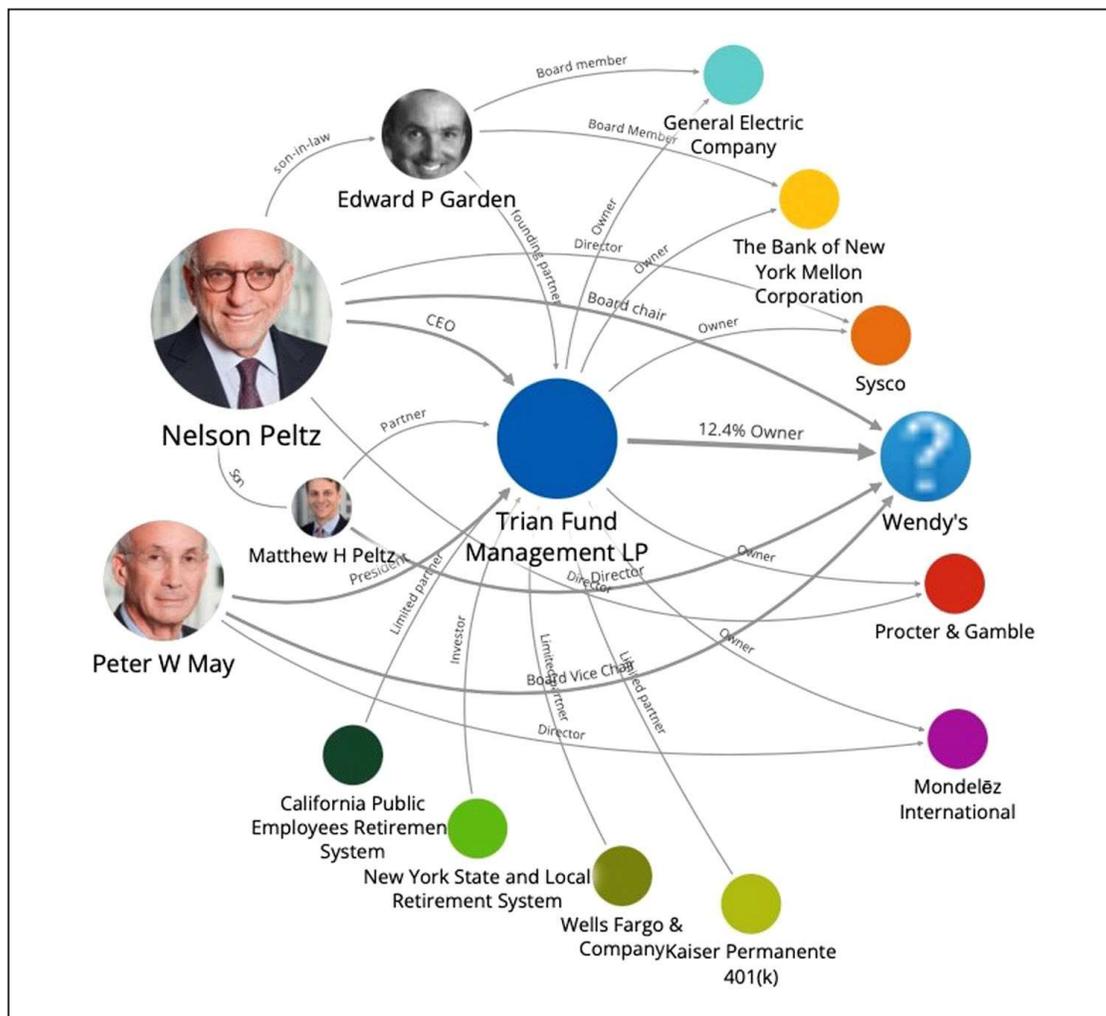


Figure 3. Trian Partners and some of its Portfolio Companies (Seidman, 2019, littlesis.org) Reprinted with permission from Public accountability Initiative.

to underscore the false assertions in Peltz's agriculture sourcing, he sought additional suppliers in Canadian greenhouses. CIW demanded empirical proof that the new suppliers treated workers better following Wendy's claims that worker conditions had improved. Pelz' antenarratives dominated the Wendy's narrative, but he had less luck at Disney, as will be summarized in the next vignette pair.

Vignette 10: Peltz Attempts to Get a Seat on the Disney Board of Directors: A Tale of Dueling Antenarratives?

This vignette includes a summary of the conflict between Pelz and Disney. . . However, in contrast to the CIW versus Pelz battle, the Disney versus Pelz discussions highlight that their antenarratives may not be as different as meets the eye.

Vignette 12: Statement from the Walt Disney Company

The Walt Disney Company (2023) replies with a similar antenarrative. . . . “Disney shareholders are not required to take any action at this time.” (The Walt Disney Company, 2023)

What Happened in the Raid Attempt?

Initially, Disney’s board seemed to fear a Pelz conquest and institute a mass firing. However, they noted that Disney had a more favorable track record than Pelz’s hedge fund. It appeared that Disney and Pelz articulated the same set of antenarratives—but Disney had more faith in their performance than that of Trian/Pelz, as shown in the next vignette.

Vignette 13: Fighting With Bigger, Tougher Investors

Pelz’ proxy battle at Disney was complicated by the fact that Disney CEO Robert Iger had unwavering supporters, including George Lucas (who owned 37.1 million shares of Disney). . . . Although this is a significant loss, Pelz has more than earned his money back based upon paper gains in share price (Sherman et al., 2024).

Coinciding Antenarratives Alignments Led to Pelz’ Downfall

The vignettes above illustrate identical antenarratives from Pelz and Disney. Pelz’ detractors believed that Pelz feigned an antenarrative of curiosity, but was a “wolf in sheep’s clothing.” They articulated that his use of Disney’s language discourse was amateurish, and asserted that his assessments of value were misguided. Robert Iger, and not Pelz, would ultimately be the champion of these antenarratives as they evolved into full-fledged stories.

It is unknowable whether Pelz or Iger’s path best followed these antenarratives. What is certain is that this proxy fight led to (at least in the short term) an increase in stock prices for Disney. Perhaps the most interesting regarding this proxy battle is the fact that Pelz lost his power not because of his vision and the accompanying antenarratives, but because he shared the same antenarratives of his potential target—Disney.

Pelz gained power over CIW because he articulated different antenarratives and discounted CIW’s antenarratives by supplanting it with his own vision. When he articulated the same antenarratives as Disney, they countered and agreed with Pelz that a change was necessary. Thus Disney and Pelz would be the champion of these changes.

Discussion and Conclusion

This article elucidates the competing antenarratives of Nelson Pelz, the CIW, and Disney. These three actors experienced intense conflict as portrayed in the media. However, the reason that Nelson Pelz was triumphant over CIW and failed against

Disney was revealed through an exploration of their respective antenarratives. CIW used the attunements of care, understanding, and fear to illustrate ways in which their viewpoint differed from Pelz's antenarratives of assertion, and curiosity. The goal of the CIW was to prove that Pelz' exploitation of farm workers was unethical and detrimental to profits. However, Pelz was able to articulate his own antenarratives to control the narrative and circumvent the antenarratives (and goals) of the CIW.

In contrast to the CIW-Pelz conflict, Pelz was not triumphant against Disney. Pelz articulated the same antenarratives as Disney. In a surprising plot twist, this agreement led to Pelz' downfall from a corporate governance perspective, but increased his economic gains. Disney stakeholders, including film legend George Lucas agreed with Pelz that the "magic" (or curiosity in Disney's language discourse) of Disney needed to be restored, but asserted that Pelz would not be the turnaround champion. As a result, Pelz lost the battle against Disney, but the value of his Disney shares increased and exceeded the economic cost of the proxy fight (Sherman et al., 2024).

Our use of the Tamara-Land tableau vivant allowed for an analysis of antenarratives of Pelz, Disney, and CIW revealed a surprising outcome that might have otherwise been obscured. Pelz did not triumph over the CIW because he was wealthier or more powerful; instead, he succeeded because he used his own antenarratives to circumvent those of the CIW. He did not tackle their antenarratives directly. In contrast, Pelz did not lose to Disney because Disney's investors were more powerful, rather because they shared antenarratives with Pelz, and relied upon their own ingenuity to outperform Pelz. The resulting increase in share price ultimately proved their assessment was correct.

A limitation of this study is the fact that is impossible to "prove" the existence of these antenarratives or their selection by any of the characters. The goal was not to provide proof, but rather to use literature (*Tamara*) to show the plausibility of our assessment. In other words, we provided the direct quotes from the individuals depicted in the stories and used the study of antenarratives from a Tamara-Land lens without any intention of providing a monopoly of interpretation. Rather readers were allowed to participate in the sensemaking process and provide their own explanations and alternative antenarratives if necessary. An additional limitation is that Pelz, Disney, and the CIW served as metaphors for antenarrative analysis which means that empirical validity was not the goal of this paper; the purpose was to provide enhanced sensemaking through literary analysis. Future research could apply the Tamara-Land tableau vivant or other literature-based methodologies and use them to reveal alternative explanations to modern management discussions.

Appendix: Full Storytelling Vignettes

Vignette 1: Pelz' Origin Story

I grew up in a middle-class family in Brooklyn. My father had a produce and frozen food distributorship right in lower Manhattan, the old Washington market. And it was doing about two million dollars a year in total volume. But he supported a family beautifully on it. . .

. . . I got good college boards. I got to Wharton and really was quite bored at Wharton. I felt I was the wrong place. What I really want to do was ski. So I left Wharton and I went up to Maine and became a ski bum (Bloomberg Wealth with David Rubenstein, 2022). . .

. . . I had a portfolio of bar mitzvah money and gifts, and I started investing in the market and I started a little fund with my money and some of my family and friends. And we did pretty well. So while I was running this food business I kept investing. I liked investing. And then I felt it was time for us to expand. When I came to the [food distribution] business we had no salesmen. I built the sales force in New York. Then, I wanted to buy a company in Boston doing the same thing. And we did. I put the money up for that personally, became the largest share owner. Then we bought one in Baltimore, Washington. Another distribution house. And then one in Philadelphia. And then we were doing almost one hundred and fifty million dollars a year in business, the largest food service distributor in the Northeast at the time. Took it public. Sold it. And then went on to doing other things. I think, what, what people don't understand is (pause .3 seconds) that we are making their portfolios better. (Bloomberg Wealth with David Rubenstein, 2022)

Vignette 2: We Are Not An Activist Investor

We are not an activist investor. What we see is we see really companies that we think were once great, have lost their way and that we have a plan for them to get back to greatness again and that's what we do. We are not there to leverage these companies. We are not there to split them up. We are not there to do all the terrible things that typically go along with the term activist. We're just trying to get these companies to operate better - the way they used to. . .

. . . No one is thrilled that we're there. Some are much more receptive to hear what we've got to say. We put together a white paper to go over with management. And that white paper stays private as long as we're in conversation and if we want a board seat when we think that they're ready to give us a board seat it will always stay private. But if (.5 second pause) if they refuse to then we make that white paper public. (Bloomberg Wealth with David Rubenstein, 2022)

Vignette 3: Episode: Trian Partners' Founding Story and Wendy's

Well, we started Trian Partners in 05. Before that I was buying companies like you did, not with a fund but with vehicles or with capital that we can cobble together. And we did some very good deals back then. We bought/ What we created was American National Can which was the biggest packaging company in the world at that time. We bought Snapple from Quaker Oats and turned that around. We created National Propane. So we've been/we did that, a single company, where we own the company, and then we decided to have a fund and that we saw a great opportunity by having a fund that could make investments in bigger companies, companies that we couldn't buy. The first one we started was Wendy's. The second one was Heinz. And Heinz unfortunately would up to be a proxy fight. It didn't need to be. I got on the board. Bill Johnson and I became very good friends, who became chairman and CEO, who fought with us. He ultimately wound up to be on our advisory board and he was our nominee on the board of Pepsi. So think about that. We, we had a proxy fight and became very fast friends, which usually is what happens. (Bloomberg Wealth with David Rubenstein, 2022)

Vignette 4: Pelz' "Secret Life" Antenarrative

Peltz also owns a 27-room mansion on a 130-acre property in Bedford, New York, that in 2009 was reported to feature ‘a lake, waterfall, indoor hockey rink with Zamboni machine, and a flock of albino peacocks that can occasionally be seen running around the manicured grounds’. He has been reported to own two matching jets, and he used to take a private helicopter to work before his neighbors in the Town of Bedford, upset with the noise, succeeded in stopping him (Seidman, 2019).

Vignette 5: His Wife Claudia Shames a Butler

We hear Mrs. Peltz summoned a butler to the master bathroom after she discovered drops of urine on the toilet seat. She demanded the butler clean it up, which he did, although she then insisted that he clean the toilet seat again. And again. It was only after he'd cleaned the seat four times — ‘once more for luck’, she said — that Mrs. Peltz, perhaps detecting some frustration on the butler's part, informed him that she didn't like his attitude and dismissed him. It was Easter Sunday. (Pressler, 2009).

His wife is part of the assertion. She terrorizes a butler, whose livelihood is dependent upon the Pelz family—a family that callously tormented him on Easter.

After a post from a former Pelz employee on the New York Magazine's website, others prior employees reported numerous abuses. Allegations continued snowballing: employees were yelled at for eating bagels sent to the trash; and, the daughter Nicola allegedly heaped abuse on maids, nannies, and butlers as a kind of sport, threatening that: “Daddy will fire you!” (Pressler, 2009). Being abusive and shaming employees was part of Peltz family assertion. To exemplify, even his daughter adopts the assertions of her parents—that people simply do not matter.

Vignette 6: Pelz, CIW, and Wendy's : Origin Story of the CIW

This is just a faster death.

With those words — and exactly twenty years ago today — six courageous farmworkers launched a month-long hunger strike in Immokalee, demanding nothing more than dialogue with tomato industry leaders about the unconscionable poverty and human rights abuses in Florida's fields. Workers at the time faced everything from forced labor to widespread sexual harassment and assault, not to mention daily humiliations in the form of systemic wage theft, violence and verbal harassment at the hands of their bosses, and dangerous working conditions. For the hunger strikers, the unremitting predations of their bosses in the fields far outweighed any possible physical consequences from the strike.

Though the growers refused to talk with the workers at the time, twenty years later conditions in Florida's tomato fields have indeed undergone an unprecedented transformation and became the gold standard in the US produce industry. Through tireless protests and consumer education, and the day-to-day hard work of educating workers, investigating and resolving complaints, and auditing for compliance with the unique Fair Food Code of Conduct, the CIW has radically improved the lives of tens of thousands of farmworkers in Florida's fields.

The hunger strikers' extraordinary sacrifice laid the foundation for the groundbreaking Campaign for Fair Food two years later and the success of the Fair Food Program that was to come. Real, profound change was not only necessary and just, it was in fact possible. (CIW, 2017).

Vignette 7: Two Faced Antenarratives?

A significant percentage of the \$10 billion in assets that Trian oversees comes from clients like union members' pension funds, liberal universities, and progressive nonprofits and foundations — all of which might be upset to learn that their money is propping up a Wall Street billionaire who refuses to do right by low-wage farm workers (Seidman, 2021).

Vignette 8: Food Fight: Pelz Versus CIW

Wall Street firm Trian Partners - headed by billionaire Nelson Peltz – effectively owns Wendy's. Trian also dominates Wendy's board. Peltz, himself has total ownership of 44.4 million Wendy's shares, and is Wendy's board chair. Trian President Peter May is Wendy's board vice chair. Even Peltz's son, Matthew Peltz, has a seat on the Wendy's board (Seidman, 2019)

Wendy's refuses to dialogue with supply chain farmworkers with respect to their working conditions, and continuously modifies its supply chain sourcing to keep CIW at bay.

Ahead of Wendy's annual shareholder meeting in May shareholders are once again pressuring Wendy's to join the Fair Food Program. A spokesperson for Wendy's dismissed criticisms of its refusal to join the Fair Food Program . . .

. . . “Wendy's does not participate in the Fair Food Program because there is no nexus between the program and our supply chain,” the spokesperson said in a statement. “Since 2019, Wendy's has sourced our North American tomato supply exclusively from indoor, hydroponic greenhouse farms, while the Fair Food Program predominantly operates in outdoor, conventional tomato growing environments. Further, Wendy's has an established Supplier Code of Conduct that applies to significant suppliers of The Wendy's Company and our North America restaurant system, and we also require third-party reviews related to the human rights and labor practices for suppliers of certain hand-harvested, whole, fresh produce such as tomatoes.” (Sainato, 2022). This quote characterizes the CIW and Wendy's as having no common supply chain, because Wendy's sources tomatoes in greenhouse farms in accordance with their Code of Conduct. This also means that Pelz is able to circumvent the antenarratives of the CIW by claiming his own antenarratives do not intersect or conflict with theirs.

Vignette 9: Anxiety Masked in Pigtails

Behind the mask of the friendly little girl with red pigtails, there is one man more responsible than any other for Wendy's failure to join the Fair Food Program: Multi-billionaire and hedge fund mogul, Nelson Peltz.

Mr. Peltz is not only the Board Chairman of Wendy's—with his son at his side as Vice Chair—but also CEO of the hedge fund Trian Partners, Wendy's largest institutional shareholder.

And Mr. Peltz also happens to have strong ties to the CIW's home state of Florida, in particular, to the billionaire enclave of Palm Beach. In addition to his \$123 million Palm Beach estate, Mr. Peltz and his partners at Trian are expanding their Palm Beach office—and on Saturday, April 2 the Fair Food Nation will be there to greet them! (CIW, 2022)

Vignette 10: Peltz Attempts to Get a Seat on the Disney Board of Directors: A Tale of Dueling Antenarratives?

This vignette includes a summary of the conflict between Pelz and Disney. Peltz and Trian began a proxy fight in January 2023 to obtain seats on the Disney board. After releasing their white paper, seats on the board were denied. Shortly thereafter, Disney appointed two new directors, James Gorman and Sir Jeremy Darroch. According to Peltz's rendition, he had criticized Disney's capital spending, its unprofitable streaming businesses (Disney Channel, Hulu & ESPN), and a bungled succession plan. Peltz aborted the initial takeover to give Robert Iger, the incoming Disney CEO, time to "right the ship."

Disney claimed that offering Pelz and his colleague, Isaac Perlmutter (a former Disney board executive who Disney fired), board seats would be disruptive. As a counter weight, Iger claimed his turnaround plan addressed Peltz' critique.

Peltz and Disney released competing statements. The "war of wills" had been reengaged. Peltz renewed his takeover attempts, moving the fight directly to the shareholders meeting. Both statements are analyzed in this article for their antenarratives in the following vignettes. However, in contrast to the CIW versus Pelz battle, the Disney versus Pelz discussions highlight that their antenarratives may not be as different as meets the eye . . .

Vignette 11: Restarting the Proxy Fight

Disney extended an offer to Trian to meet with the Board, but informed Trian that the Board declined Trian's request for Board representation. Trian's response was as follows:

Since we gave Disney the opportunity to prove it could "right the ship" last February, up to our re-engagement weeks ago, shareholders lost ~\$70 billion of value. Disney's share price has underperformed proxy peers and the broader market over every relevant period during the last decade and over the tenure of each incumbent director. Investor confidence is low, key strategic questions loom, and even Disney's CEO is acknowledging that the Company's challenges are greater than previously believed. While James Gorman and Sir Jeremy Darroch represent an improvement from the status quo, the addition of these directors will not, in our view, restore

investor confidence or address the root cause behind the significant value destruction and missteps that this Board has overseen. Trian intends to take our case for change directly to shareholders. (Business Wire, 2023)

Vignette 12: Statement from the Walt Disney Company

The Walt Disney Company (2023) replies with a similar antenarrative. Disney retorts that the program to restore creativity, reduce cost, and increase efficiencies resulted in \$7.5 billion savings:

The Walt Disney Company has a proven track record of delivering long-term value to our shareholders and is in the midst of a significant transformation to reinforce our position as the world's preeminent entertainment company. Over the past twelve months, we restructured the company to restore creativity to the center of all our businesses as we significantly reduce costs and drive efficiencies, and we are on track to achieve about \$7.5 billion in cost savings—\$2 billion more than our original target . . .

. . . Disney is moving from a period of fixing to a new era of building, as the entire media sector navigates the crosscurrents of the competitive landscape for streaming. We are executing on four key building opportunities that will be central to our success: achieving significant and sustained profitability in our streaming business; building ESPN into the preeminent digital sports platform; improving the output and economics of our film studios; and turbocharging growth in our Experiences business. Our extraordinary portfolio of businesses, brands and assets—and the key synergies between them—are the foundation to developing the popular franchises that will continue to drive our strategic success. With one of the strongest balance sheets in the media sector, Disney expects free cash flow to approach pre-COVID levels in fiscal 2024, and the Board and management are steadfast in our commitment to ensuring The Walt Disney Company's long-term success for the benefit of all our shareholders. . .

The next paragraph counters Trian Partners' claim that new board seats are appropriate at this time:

. . . Disney also continues to refresh its Board of Directors, including the appointments of James P. Gorman, Chairman and Chief Executive Officer of Morgan Stanley, and Sir Jeremy Darroch, a veteran media executive and former Group Chief Executive of Sky, as new directors, as the result of a lengthy and comprehensive search that began in April of this year. Their appointments reflect Disney's commitment to a strong board focused on the long-term performance of the company, strategic growth initiatives, the succession planning process, and increasing shareholder value. As also announced yesterday, Disney board member Francis A. deSouza has decided not to stand for reelection at the annual meeting.

The following vignette acknowledges that Peltz is dispositioning the issue to the shareholders, and claims that Perlmutter has a "personal agenda" relevant to the shareholders' decision.

. . . Mr. Peltz, in partnership with Isaac Perlmutter, a former Disney executive, intends to take its case to shareholders. Mr. Perlmutter owns 78% of the shares that Mr. Peltz claims beneficial ownership of, or more than 25 million of the 33 million shares. This dynamic is relevant to assessing Mr. Peltz and any other nominees he may put forth as directors, as Mr. Perlmutter was terminated from his employment by Disney earlier this year and has voiced his longstanding personal agenda against Disney's CEO, Robert A. Iger, which may be different than that of all other shareholders.

The Disney Board will recommend to shareholders its slate of director nominees in the company's proxy statement to be filed with the Securities and Exchange Commission and distributed to all shareholders eligible to vote at the annual meeting.

Disney shareholders are not required to take any action at this time. (The Walt Disney Company, 2023)

Vignette 13: Fighting With Bigger, Tougher Investors

Pelz' proxy battle at Disney was complicated by the fact that Disney CEO Robert Iger had unwavering supporters, including George Lucas (who owned 37.1 million shares of Disney):

"Creating magic is not for amateurs. When I sold Lucasfilm just over a decade ago, I was delighted to become a Disney shareholder because of my long-time admiration for its iconic brand and Bob Iger's leadership," Lucas said Tuesday in his statement of support. "When Bob returned to the company during a difficult time, I was relieved. No one knows Disney better." . . .

. . . "I remain a significant shareholder because I have full faith and confidence in the power of Disney and Bob's track record of driving long-term value. I have voted all of my shares for Disney's 12 directors and urge other shareholders to do the same," Lucas said in a statement seen by Reuters (2024a, 2024b).

Lucas was not alone in his support for Iger or disdain for Pelz.

The grandchildren of Disney founders Roy and Walt Disney last month publicly backed Iger and the board, calling the activist investors "wolves in sheep's clothing" waiting to tear the company apart. (Reuters, 2024a, 2024b)

Other backers of Iger included Jamie Dimon (JP Morgan Chase) and several institutional investors, including Blackrock (Sherman et al., 2024). The ultimate result of this proxy battle was that Iger won the election with 94% of cast. Pelz' two board candidates lost by a 2:1 and 5:1 ratio, respectively (Sherman et al., 2024).

Disney spent approximately \$40 million dollars to exclude Pelz from Disney compared to the \$25 million that Pelz spent. Although this is a significant loss, Pelz has more than earned his money back based upon paper gains in share price (Sherman et al., 2024).

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Author Biographies

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