

**Voice and visibility: Tackling the 'invisibility' of the sexual orientation strand in UK organisation equality and diversity research**

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## **Abstract**

This covering statement introduces the nine published outputs in this submission, and explains their genesis. It considers the implications of the growing visibility of the sexual orientation strand for individuals and organisations operating in the UK context before and after the introduction of the Employment Equality (Sexual Orientation) Regulations 2003 (hereafter the Regulations). The PhD advanced knowledge and understanding of the following: the rationale for and drivers of sexual orientation equality work in UK trade union, public, private and voluntary sector organisations over the last two decades; the equality/diversity structures, policies and practices introduced by organisations in order to become more inclusive of lesbian gay and bisexual (LGB) people; LGB people's perceptions and experiences of these sexual orientation equality and diversity policies and practices; LGB people's voice, activism and agency in influencing the changes which have been taking place. The covering document provides details of the research projects and the interpretivist case study methodology on which the published outputs draw. It summarises and links the aims and principal findings of each output demonstrating that they form a coherent body of work. It concludes that although the introduction of the Regulations has been a positive trigger to sexual orientation equality work in the UK, progress remains uneven within and across organisations. Thus, it identifies voice mechanisms such as LGBT trade union and company network groups as key tools for inclusion. The conclusion locates the PhD as an original contribution to the advancement of sexual orientation organisation equality/diversity research. It does so by discussing its empirical and theoretical contributions to a sexual orientation research agenda which has been developing in waves subject to social, political and legal change and mobilisation in LGBT communities in different parts of the world.

## 1. Introduction

My PhD by prior output application is based on nine published outputs from two major funded research projects:

- 1) 'Strategies of women activists in response to new trade union structures: A comparative study of UNISON and the GPMU' (ESRC 1994-97).
- 2) 'Tackling 'Multiple Discrimination' and social exclusion at work: an examination of the intersection between gender, race, age and sexual orientation in London and Yorkshire' (The Higher Education European Social Funded, HEESF 2004-2007).

Outputs from the first project (ESRC) have been selected to reveal the point at which I chose to make sexual orientation visible by 'mainstreaming' it as an explicit equality strand within my published research. Outputs from the second project (HEESF) have been selected because it is my first funded project focusing specifically on the voice and visibility of lesbian, bisexual and gay (LGB) people in UK organisation equality and diversity research. Nine published outputs from these two projects will be offered as evidence of a coherent body of work worthy of the award of a PhD by Prior Output. The nine selected outputs are referenced in bold in the covering statement and reference list. Outputs 1-4 will be based on the ESRC research and outputs 5-9 on the HEESF research project.

A consistent strand within my research has been a focus on the perceptions and activism of 'minority' groups, specifically women, black and minority ethnic, disabled and lesbian, gay and bisexual (LGB) people. My research outputs have focused on self organisation as a route to safe space, empowerment and the development of

self confidence, personal growth, voice, networks (and for those who wish to work collectively) activist skills and political development. Although the ESRC project focused primarily on gender and trade unions, a research door was opened which permitted me to first include and then move on via the HEESF project to specifically explore the perceptions and experiences of LGB people seeking voice, visibility and inclusion in a broader range of organisational settings and contexts. As Morrison and Miliken (2003: 1353) in their influential special edition on the dynamics of voice and silence suggest 'people often have to make decisions about whether to speak up or remain silent.' This was the point at which I decided to speak up in order to ensure the inclusion of LGB voices in organisation equality and diversity research. As Creed (2003:1507) suggests 'it matters whose voices and silence we consider: the natures of both voice and silence may vary across identity groups that have different legacies of oppression and avenues of resistance'. Bell et al., (2011) recognising this, have indicated the importance of establishing appropriate voice mechanisms for LGBT people (and other minorities) in workplace diversity and inclusion strategies.

My claim to an original contribution to knowledge lies in the part played by my publications in addressing the research gap on sexual orientation in UK organisation equality and diversity research before and after the introduction of the Employment Equality (Sexual Orientation) Regulations 2003 (hereafter the Regulations). The Regulations outlawed discrimination in the workplace on grounds of sexual orientation and provided protection against harassment at work for the first time in the UK. Thus the research projects and the subsequent articles focused primarily on sexual orientation rather than transgender issues. However, trans people who identified as LGB participated in the research. As will be noted throughout the

document, the terminology in the field shifts from 'lesbian and gay' to 'lesbian, gay and bisexual' (LGB) to the current more commonly used term 'lesbian, gay, bisexual and transgendered' (LGBT) as organisations have established policies and practices that are inclusive of all LGBT people (Richardson and Monro, 2012) .

Over the last twenty years, sexual orientation has become an important source of employee and customer diversity, as people in the UK increasingly feel able to self-identify, speak up and become visible as LGB in organizations and society (Stonewall, 2012). Despite a liberalisation in social attitudes and a more comprehensive anti-discrimination legislative framework in the UK and other parts of the world, research indicates that heterosexism and homophobia remain problematic (Stonewall, 2013; Itaborahy and Zhu, 2014). My research has considered the implications of the growing visibility of the sexual orientation strand for individuals and organisations operating in a UK context. It has done so during a period when social attitudes, the law and public policy have undergone considerable change (Stonewall, 2012).

Bowen and Blackmon (2003:1400) suggested that of all the equality strands covered by equality/diversity policy, sexual orientation has been one of the most 'invisible' areas of diversity, much less researched in social science and management studies than other 'visible' forms such as gender or race and ethnicity. Dunne (2000) argued the need to move beyond a 'theoretical heterosexism' in studies of organisations, work and family life. Some feminist research did begin to do this (Cockburn, 1991; Acker, 2000) but its primary focus tended to remain gender, class and race. Over the last thirty years, three waves of sexual orientation organisation research have emerged in European and North American research (Ozturk, 2011; Colgan and

Rumens, 2014; Ozeren, 2014). It will be argued that the nine outputs submitted via this PhD by prior output have made an original contribution to these three waves of organisation equality and diversity research. The PhD by prior output aims to demonstrate the contribution made by these publications, considered separately and together to advance knowledge and understanding of the following:

- a) To examine the rationale for and drivers of sexual orientation equality work in UK trade union, public, private and voluntary sector organisations over the last two decades;
- b) To identify the equality/diversity structures, policies and practices organisations have introduced in order to make organisations more inclusive of LGB people;
- c) To explore LGB people's perceptions and experiences of these sexual orientation equality and diversity policies and practices;
- d) To reveal LGB people's voice, activism and agency in influencing the changes taking place.

The covering statement is structured as follows: it begins by providing an autobiographical account of my career and the development of the research agenda linking the selected publications. It then introduces the ESRC and HEESF research methodologies before moving on to review of the nine submitted publications. Finally it concludes by discussing the contribution the publications have made to organisational equality and diversity research.



## **2. Autobiographical Background and Development of Research Agenda**

I started work in the Business School at the then Polytechnic of North London (PNL) in 1986 as a Research Fellow on an ILEA funded project Women in SOGAT'82 (led by Sue Ledwith). The project focused on the employment of women in the print industry, union representation and equality issues within the print union SOGAT'82. I subsequently applied for and was appointed as a Research Fellow on a related project initiated by a women's network, Women in Publishing, researching the status of women in UK book publishing (led by Frances Tomlinson).

Both of these studies (Ledwith et al. 1986; Colgan and Tomlinson, 1989) were valuable in re-introducing me to the much changed post-1979 UK political, economic and social context (after 6 years studying and working in Canada). These projects provided useful insights into the ways in which women and increasingly black and lesbian and gay activists were challenging inequalities in print and book publishing workplaces with employers and trade unions. This stimulated my interest in voice, activism, agency and the triggers and barriers to workplace equality in the UK. I applied for and was appointed to the post of lecturer in industrial relations at the beginning of 1989. This allowed me to work with academic colleagues to write up academic research exploring the gendered social processes underlying the 'making of trade union leaders' (Ledwith et al. 1990) and the creation and re-creation of gendered patterns of occupational segregation in the book publishing sector (Colgan and Tomlinson, 1991).

I became an active member of the Centre for Equality Research in Business (CERB) which had been established in the late 1980s as a multidisciplinary research centre by Sue Ledwith, Frances Tomlinson and other Business School colleagues. CERB aimed to encourage research and curriculum development drawing on the new insights on organisation, equality and diversity coming through from the social sciences, particularly feminist, race and lesbian and gay studies. Work by authors such as Rowbotham et al., (1979); Cockburn (1983); Marshall, (1986); Collinson et al. (1990); Walby, (1990) were all important influences at the time. I found myself increasingly drawn to authors such as Kanter, (1977); hooks (1984); Hearn and Parkin (1987); Hall (1989) and Cockburn (1991) who recognised the diverse organisational experiences of men and women building issues of gender, race, sexuality and disability into their research analysis.

In 1991, I was promoted to Senior Lecturer, Industrial Relations and Organisation Studies and in 1993 (following the departure of the previous Director, Sue Ledwith), I became the Director of CERB and Course Leader of the MA Employment Studies and HRM (1994-2010). As Director of CERB, I successfully applied for external research funding. One of the two funded projects relevant to this PhD by prior output was the ESRC funded *Strategies of Women Activists in Response to New Trade Union Structures: A Comparative Study of UNISON and the GPMU* (1995-1997). I was the principal applicant on the project and my co-applicant was Sue Ledwith (relocated to Oxford Brookes University). The project built on earlier contacts we had developed in SOGAT'82 (renamed the GPMU following merger with the other print union, the NGA) and UNISON (renamed following the merger of 3 public sector unions, COHSE, NALGO and NUPE). Stimulated by the debates in the literature at

the time, we were particularly interested in women's activism informed by the intersections between the feminist, race and labour movements (Colling and Dickens, 1989; Cobble, 1993; Heery and Kelly, 1988, Virdee and Grint, 1994). As little academic research had thus far been published on the intersections between the labour movement and the LGBT and disabilities movements, I indicated that given my involvement with my union LGBT group it might also be appropriate for me to try to move the industrial relations research agenda forward by also focusing on recent LGBT and trade union equality initiatives on sexual orientation (Labour Research Department, 1992; TUC, 1992). The ESRC research programme was successfully concluded with reports to the two unions and an end of project report to the ESRC. The ESRC report was rated as 'Good' by ESRC peer review.

Sue Ledwith and I sought a publisher for an edited book as one output from the ESRC funded research and the equalities research in a range of organisational contexts being done through CERB. We co-edited *Women in Organisations: Challenging Gender Politics* (1996a). The introduction and concluding chapters allowed Sue and I to focus on women's agency and potential to act as organisational change agents as they developed strategies to survive, progress and develop according to their 'reading' of the gendered, racialised and heteronormative contexts they found themselves in (Colgan and Ledwith, 1996a; 1996b, 1996c). Following the completion of the ESRC funded research project, Sue and I co-wrote a number of conference papers plus journal articles. We also co-edited a book *Gender, Diversity and Trade Unions: International Perspectives* (2002a). As a result I was entered into the Research Assessment Exercise submission for Business and Management (2001).

These research outputs were informed by feminist research on gender, identity, democracy and collective action (Briskin and McDermott, 1993) and a growing body of industrial relations research on the potential for union renewal presented by organising unionism (Heery et al. 2000). Influenced by the work of Cockburn (1995) and Yuval-Davis (1998), I increasingly sought to move away from writing about trade union renewal solely with reference to gender, instead recognising the need to build diversity into our analysis of the priorities and strategies of women trade union activists (**Colgan and Ledwith, 2000**) and the implications for trade union democracy and mobilisation (**Colgan and Ledwith 2002b; Colgan and Ledwith, 2002c**).

For me, this required the inclusion of the sexual orientation alongside gender, race and disability strands. During the ESRC research, one of the areas of fieldwork I was responsible for was the research with LGBT equality activists. In addition to incorporating insights from this LGBT research into the joint publications with Sue, I wrote a single-authored article on lesbian and gay activism in UK trade unions<sup>1</sup> (**Colgan, 1999a**). I also contributed a single-authored chapter on the important contribution to trade union renewal being made by lesbian and gay self organisation in UNISON to Hunt's *Labouring for Rights: Unions and Sexual Diversity Across Nations* (Colgan, 1999b).

Between 2002 and 2004, I continued to work on externally funded projects focusing on equality and diversity issues in trade unions (Murton et al. 2002, Colgan and Creegan 2003, Colgan and Creegan, 2006) and a range of other organisations

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<sup>1</sup> At the time many trade union structures focused on 'lesbian and gay' activism, as time progressed, the remit was widened to include lesbian, gay, bisexual and transgendered (LGBT) activism. Similarly, research in this area was originally focused on lesbian and gay activism but over time has broadened to include bisexual and trans people. Many organisations have now chosen to adopt policies and establish groups that are inclusive of lesbian, gay, bisexual and trans people.

(Colgan et al. 2001; Colgan and Creegan 2002, Creegan et al. 2003). During this time, I ensured that all equality strands, including sexual orientation were mainstreamed within the research. In addition I actively sought funding to develop research on sexual orientation equality issues. This was because I continued to find that sexual orientation research was ‘thin on the ground’ in organisation and management academic journals and at academic and practitioner conferences. In addition to making the sexual orientation strand visible, following on from my earlier research on women’s activism, I wanted to give ‘voice’ to LGB people’s workplace experiences and their campaigns which had led to the post-1997 changing political, social and legal context in the UK. I successfully applied to HEESF for the second funded project relevant to this PhD, *Tackling ‘Multiple Discrimination’ and social exclusion at work: an examination of the intersection between gender, race, age and sexual orientation in London and Yorkshire (2004-2007)*. I was the sole applicant and the Project Leader. With the budget I funded research relief for my colleague Aidan McKearney and employed Chris Creegan and Tessa Wright to work on the project.

The HEESF research sought to address the gap in knowledge regarding the experiences of LGB<sup>2</sup> people within UK workplaces following the introduction of the Regulations. It also aimed to find out what employers and trade unions were doing to tackle equal opportunities and social exclusion following the introduction of the Regulations. The HEESF funded project built on contacts that I had established since the late 1990s with trade unions, LGBT campaigning groups and good practice organisations such as ACAS , CIPD, the Local Government Employers Organisation

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<sup>2</sup> The Regulations addressed discrimination on grounds of sexual orientation, thus the research project focused on sexual orientation and not on transgender issues.

and the Women and Equality Unit. These contacts were important in assisting the project to access employer, trade union and LGBT participants. The report (Colgan et al. 2006a) was launched at a successful one day conference at the University which was attended by 100 academics and practitioners. The report and the conference were publicised in a range of practitioner media (Colgan et al. 2006b) including the 'Professional Insights' section of the *Equal Opportunities International* journal (Wright et al., 2006).

Following the completion of the HEESF funded research project, I was the lead author on a number of publications which sought to raise the profile of LGB workplace issues and identify good workplace practice from the point of view of LGB people (**Colgan et al. 2007**; Colgan and McKearney, 2011a) as well as other organisational stakeholders (**Colgan et al. 2009**; Colgan and Wright, 2011; **Colgan, 2011**). In addition, these articles considered the differing contexts, initiatives, triggers and barriers to sexual orientation good practice within public, private and voluntary sector workplaces. In **Colgan and McKearney (2012)** we argued that in UK organisations, the initial impetus for sexual orientation equality work had primarily been the agency and activism of LGBT people and their allies. The paper explored the ways in which LGBT people thought that LGBT union and workplace network groups provided mechanisms for voice, visibility and community. As identified in earlier research (**Colgan and Ledwith, 2002b**) self organisation via both union and workplace network groups was important in providing LGBT employees with 'safe' space within which group identity, consciousness, voice and strategies for change could be developed. The report (Colgan et al., 2006a) and subsequent publications addressed the heterogeneity within the acronym 'LGB' in terms of age, gender,

disability and race. However, informed by the increasingly influential research on intersectional analysis (Crenshaw et al. 1995; Adib and Guerrier, 2003), I began to produce outputs focusing within the broader acronym 'LGBT' to consider the specific experiences and employment strategies of lesbians (Colgan et al. 2008), black and minority ethnic (BME) and disabled LGBT employees (**Colgan, 2014**) and reflect on the need for cross-strand equality work (Colgan, 2010).

To address the vacuum on sexual orientation research I initiated and organised six conference streams with academic colleagues at two 'LGBT friendly' conferences (*Equality Diversity and Inclusion* and *Gender, Work and Organization*) between 2009 and 2013. These conference streams were organised to raise the visibility of sexual orientation/sexuality research and create 'space' and 'community' for those of us developing research in the field. The first of these streams ran in 2009 at the *Equal Opportunities international Conference* (title thereafter *Equality Diversity and Inclusion*) at Bosphorus University. Following a very successful stream (one of the largest at the conference), Aidan McKearney and I edited a special edition of the *Equality Diversity and Inclusion journal* entitled '*Spirals of Silence? Tackling the 'invisibility' of the sexual orientation strand and sexuality in academic research and in organisation equality and diversity policy and practice*' (Colgan and McKearney, 2011b). The University has submitted research outputs from my published work on sexual orientation to the Research Excellence Framework 2014 (Panel 22 Social Work and Social Policy).

I am now part of a vibrant and visible research community working on sexual orientation and broader sexuality organisational equality issues. I continue to conduct

research on LGBT issues (Colgan et al, 2014) as well as the broader sexuality and equality/diversity and HRM field (Bond et al., 2009). I have developed a research programme (with McKearney) focusing on employment equality and HRM in Russia (Colgan et al. 2014). I have recently co-edited a book (with Rumens) entitled *Sexual Orientation at Work: Contemporary Issues and Perspectives* (2014b). The book draws on new theoretical perspectives including intersectionality and queer theory to consider sexual orientation discrimination and equality work in a range of countries including Australia, Austria, Canada, South Africa, Turkey, US and the UK.



### **3. Review of Selected Publications**

#### **3.1 Introduction**

This section will provide a review of nine published outputs which have been selected to meet the research aims and are in line with PhD by prior output guidelines. The intention is to indicate the findings and contribution of each output with reference to the key literature within the field. The section first offers an overview of the ESRC and HEESF research project methodology for data collection and analysis. It will then introduce the four outputs from the ESRC research before moving on to introduce the five selected outputs from the HEESF funded research project. The selected research-based publications include: two single-authored articles; one single authored book chapter; five joint-authored articles and one joint-authored book chapter. In all cases I was the lead author (please see Appendix III for statements on individual contributions from co-authors). All submitted articles were published in refereed journals listed in the Association of Business Schools Journal Quality Guide (2010). A table illustrating the Google Scholar citations (at 12, October 2014) for these publications is available in Appendix II and the publications themselves are included in Appendix IV.

#### **3.2 The Research**

My research on the perceptions and experiences of 'minority' groups including lesbian, gay and bisexual people in a range of organisational contexts has been located in an interpretivist paradigm informed by feminist (Maynard and Purvis, 1994;

Letherby, 2003) and LGBT (Meezan and Martin, 2003; Cant and Taket, 2008; Taylor et al, 2011) debates on research philosophy and methodology. Interpretivist approaches have been credited with offering new routes to develop innovative research on organisations and management (Sandberg, 2005). The ESRC and HEESF research projects focused on embedded individuals' experiences and agency within their organisations recognising that social reality is a constructed world built in and through meaningful interpretations and interactions (Prasad and Prasad, 2002). Both projects adopted a case study research strategy because this allowed the investigation of a 'contemporary phenomenon... in depth and within its real-life context' (Yin, 2014:16). This recognised the importance of time and context in understanding the research participants' perceptions, experiences and agency (Anderson, 2013). It allowed for a more reflexive approach to the phenomena being researched during data collection and analysis (Almack, 2008; Haynes, 2012). It also made it possible to draw on a range of data including observation, in-depth interviews, survey data and documentary analysis as appropriate to each study's research objectives.

### **3.2.1 ESRC Project (1994-1997)**

The ESRC research involved a comparative case study of UNISON (1993) and the GPMU (1991). Each union had recently been the product of a union merger. The project objectives as agreed with each union focused on:

- The priorities and strategies of women activists within the new and evolving trade union structures and cultures;
- The potential for change and renewal created by women's trade union activism within the trade union movement;

- Stakeholder views of equality policy and practice within the two unions.

The research programme included the analysis of GPMU and UNISON union documents, attendance at union events including national, regional and branch meetings and conferences. In addition an extensive interview programme was organised including:

- a) Interviews with 27 male and female national officers as key informants
- b) Interviews with 69 male and female lay representatives on national committees (self organised and mainstream);
- c) Interviews with 151 UNISON and 80 GPMU lay members
- d) Interviews with all of the UNISON regional women's officers;
- e) Selected branch/regional case studies in the GPMU and UNISON;
  - interviews with 38 regional/branch officers and lay representatives active at workplace and regional level in both unions;
  - survey of stewards in 9 branches (within the 3 UNISON case study regions) and 7 chapels (within 2 GPMU case study branches) - 358 responses.
- f) Survey of women activists – 478 responses (111 GPMU and 367 UNISON)

The research programme was designed to meet the agreed project objectives. In establishing the priorities and strategies of women activists within new and evolving trade union structures and cultures, we decided that we wished to explore women's activism in a number of sites across both unions rather than focusing solely on women's self organisation (Parker, 2003; Kirton and Healy, 2004). We wanted to consider the role of both 'traditional' and 'new' social movements in shaping women's

activism. Here we were informed by our earlier research with these unions (Ledwith et al. 1990) plus feminist debates on epistemology, methods and practice (Stanley and Wise, 1993; Maynard, 1994). These suggested that although there was a material reality which all women shared, characterised by inequality and oppression, it was important to recognise that the forms this oppression took were conditioned by race, age, sexuality and other structural, historical and geographical differences between women (hooks, 1984; Stanley and Wise, 1990; Brah, 1992). As a result, we designed our fieldwork to include activism across all four self organised groups (hereafter SOGS) in UNISON (Women, Black, Disabled and Lesbian and Gay) and the GPMU equality structures plus 'mainstream' union structures in both unions at national, regional and local level.

Interview data was collected via unstructured in-depth interviews using open-ended topic guides. The interviews were taped and transcribed verbatim for analysis. The interview transcripts were coded and analysed thematically. The surveys were analysed with the use of SPSS to produce headline demographic and attitudinal data for each union on post-merger attitudes to equality policy and practice. Union documentation was analysed to provide a historical profile of equality work within each case study organisation.

### **3.2.2 HEESF Project (2004-2007)**

This research project was a qualitative study carried out through a series of 16 case study organisations, one year after the introduction of the Regulations. The project aimed to:

- examine the forms and effects of discrimination, harassment and social exclusion experienced by LGB people at work;
- explore their strategies for coping with discrimination, harassment and social exclusion;
- identify what they thought the impact of the Regulations had been on equal opportunities within the workplace;
- find out what employers and trade unions were doing to tackle equal opportunities and social exclusion following the introduction of the Regulations;
- identify examples of good practice in order to contribute to the development of inclusive and productive employment policies and practices.

The case study research strategy focused on two geographical areas – London and Yorkshire as these provided contrasting areas with ethnically diverse populations and vocal and visible LGB communities. It was designed to consider both the organisational ‘top down’ view of equality policy and practice concerning sexual orientation and the ‘bottom up’ perception of its importance, implementation and possible areas for improvement by LGB employees working within the organisations.

Across the 16 case studies (9 public, 5 private and 2 voluntary sector) this involved: the analysis of company documentation and reports; interviews with:

- a) 60 management, trade union and LGBT network group company key informants.
- b) 154 LGB respondents who also completed a short self-definition survey

- c) 25 national key informants within UK organisations representing government, employers, employees, plus LGB people charged with disseminating advice and promoting good practice following the introduction of the Regulations. LGB

Research on LGB issues was a relatively new and sensitive area in the UK (McManus, 2003; Cant and Taket, 2008) so the project methodology needed to be developed in order to encourage a broad range of organisations and LGB people to participate. The project was informed by an 'appreciative inquiry' approach (Liebling et al. 1999; Whitney and Trosten-Bloom, 2010). It approached organisations which were identified as 'good practice' organisations with the assistance of employer organisations, trade union and LGBT groups. The focus on 'good practice' within the organisations was justified given the research sought to identify inclusive and productive employment policies and practices. Despite trying to maximise the diversity amongst LGB respondents via multiple access routes, the study experienced the same difficulties as other LGB studies in accessing a diverse population (McManus, 2003). Those coming forward to participate in the research were inevitably those who felt able to do so. However one of the specific problems in conducting research in the sexual orientation field continues to be the lack of reliable UK official statistics on the breakdown of the population by sexual orientation (Mitchell et al. 2008) making it difficult to say whether a sample of LGB respondents is representative (statistically or otherwise). A profile of the demographic breakdown of the sample is provided in **Colgan et al. (2007: 593)**.

The self-definition survey was analysed with the use of SPSS in order to present a profile of the LGB respondents overall and by sector. It was also used to inform our

sampling strategy in relation to demographic characteristics and the extent to which respondents were 'out' at work. Interview data was collected via unstructured in-depth interviews using open-ended topic guides at a place and time appropriate to the respondent. The interviews were taped and transcribed verbatim for analysis. Interviews were coded to allow the development of themes by organisation and/or stakeholder group as appropriate, using N6 computer-assisted qualitative data analysis software. Company documentation was analysed to provide a historical profile of sexual orientation equality work within each case study organisation.

### **3.2.3 Research Ethics**

Both research projects and publication of research outputs were conducted with due consideration of ethical concerns as set out in the University Research Ethics Policy and Procedures appropriate during the research programmes and the publication process (London Metropolitan University *Code of Good Research Practice*, 2014).

During the **ESRC project** 'Strategies of women activists in response to new trade union structures: A comparative study of UNISON and the GPMU', we ensured we complied with ESRC guidelines on access, confidentiality and anonymity. Participation in the research project was voluntary and on the basis of informed consent. No respondents were identified in the project report or subsequent outputs. Survey data, interview data and union documentation was securely maintained. As agreed with each union, we shared our aggregate research findings at appropriate internal meetings prior to completion of a confidential report for each union.

During the **HEESF Project** 'Multiple Discrimination' and social exclusion at work: an examination of the intersection between gender, race, age and sexual orientation in London and Yorkshire' we ensured we complied with HEESF guidelines on access, confidentiality and anonymity. Participation in the research project was voluntary and on the basis of informed consent. No respondents were identified in the project report or subsequent outputs. Interviews were held at a time and a place which was most convenient and appropriate to the interviewee.

Survey data, interview data and organisation documentation were securely stored. As agreed with each organisation we shared our aggregate research findings at appropriate meetings prior to completion of a draft project report which was circulated to the 16 case study organisations for comments prior to the launch of the final report at a public conference. Fourteen organisations choose to be identified in the report but two chose to remain anonymous.

### **3.3 Published Outputs**

The first paper I wrote from the ESRC funded research project '**Recognising the lesbian and gay constituency in UK trade unions: moving forward in UNISON?**' (Colgan, 1999) contributed to an emerging body of work on 'minorities' within trade unions. Much of the research on 'minorities' at the time focused on the representation of women within unions. Gender representation within unions was a growing focus of interest within industrial relations research as union membership declined post-1979 and the proportion of women's membership increased to about a third of UK union members in 1986 (Mann et al., 1997). This was the case with feminist researchers



(Cunnison and Stageman, 1993; Kirton, 1999) as well as 'mainstream researchers' questioning power and democracy within unions (Fosh and Heery, 1990). Hyman as early as 1994 acknowledged that despite democratic constituencies most unions had 'typically been biased in the composition of their officials and activists towards relatively high-status, male, native-born, full-time employees' (1994, 121).

Mainstream industrial relations research was primarily concerned with the radically altered economic, political environment and legal environment for British trade unionism following the election of the Conservative government (Millward et al. 2000). The TUC's 'New Unionism' programme (1996) building on organising models developed in the United States and Australia, opened up the opportunity for discussion on the social processes within unions which resulted in the inclusion or exclusion of specific constituencies within union structures (Hyman, 1994). My paper used the opportunity presented by this growing interest in union democracy to build on the existing literature on gender, race and disability in order to address the vacuum on lesbian and gay trade union activism.

It did so via a literature review of published data on discrimination and the importance to lesbian and gay people of their union's commitment to lesbian and gay issues (LRD, 1992; Palmer, 1993). The paper charted the progress from the TUC Charter on Equality for Lesbian and Gay Workers (TUC, 1984) to the establishment of the first annual TUC Lesbian and Gay motion-based Conference in 1998 (TUC, 1998). Finally it presented case study research on the most advanced example of union lesbian and gay self organisation in the UK. The paper illustrated the importance of the establishment of the Lesbian and Gay self organised group (SOG) as a voice

mechanism, particularly for lesbian and gay people who had not been 'out' in their previous unions. It encouraged them to be 'out', visible and active. The research was important in revealing the priorities and strategies of public service lesbian and gay union members during the mid-1990s plus the ways in which trade union democracy (informed by the LGBT movement) could give voice to and produce representative outcomes from the lesbian and gay membership. However, the paper also indicated the tensions and difficulties experienced by lesbian and gay activists in raising issues at national level with service groups and particularly at regional and branch level. It concluded that although the Lesbian and Gay SOG was an important voice and transformative mechanism within the union, despite some successes it was very much a work in process. Although UNISON had made substantial changes to its constitution and structure to deliver equality and democracy (Terry, 2000), the interviews illustrate the attitudinal and structural barriers lesbian and gay members still encountered within their trade union.

When I wrote this paper, there was a complete absence of published academic research on lesbian and gay people in trade unions. On reflection I think the paper's contribution lies in its early evaluation of union democracy by lesbian and gay union members. Also in its addition to the first wave of research on sexual orientation research which sought to make lesbian and gay people visible in a range of British and North American organisations by telling their stories and making available new empirical material charting their activism and experiences (Adam, 1987; Kyatt, 1992; Plummer, 1992; Burke, 1993). The paper has contributed to that literature and has been referred to by subsequent research developing understanding of worker voice, democracy and representation (Heery, 2010; Briskin, 2011). It has also contributed

an early building block to the emerging literature on sexual orientation and trade unions (Humphrey, 2002; Bairstow, 2007; Hunt and Rayside, 2007).

In contrast, women's representation in unions, forms of separate organization and the differences women's involvement could make to trade unions, were a fast growing area of research by the end of the 1990s. American (Cobble, 1993) Australian (Pocock, 1997; Franzway, 2001), Canadian (Briskin and McDermott, 1993) and British research (Heery and Kelly, 1989; Healy and Kirton, 2000; Kirton, 1999; Dickens, 2000; McBride, 2001; Parker, 2003) provided accounts of women's activism and the triggers and barriers women encountered within the evolving cultures and structures of the trade union movements of the time. Although research was becoming available on BME (Virdee and Grint, 1994; Kirton and Greene, 2002; Leah, 1993), lesbian and gay (**Colgan, 1999**, Humphrey, 1999; Hunt, 1999) and disabled people's (Humphrey, 1998, 2002) representation and participation in unions, an examination of the intersections between gender, race, sexual orientation and/or disability was little developed at the time. The research cited above plus industrial relations literature concerning trade union participation, representation, renewal and internal democracy (Fosh and Heery, 1990; Darlington, 1994; Kelly 1998; Colling and Dickens, 2001) provided the backdrop for the next three papers.

**'Feminism, diversity, identities and strategies of women trade union activists,' (Colgan and Ledwith, 2000)** explored the relationships between women's individual identities and their priorities and strategies by focusing on women activists within UNISON. In the paper, identities were recognised as interactive, shifting and being constructed in interaction with others and being validated or not by others (Cornell

and Hartmann, 1998). This paper has been included in my PhD by prior output statement to illustrate the way in which sexual orientation was mainstreamed in our ESRC research outputs. Following the introduction of the SOGs, UNISON offered a unique case study within which women, lesbian and gay, black and disabled activists' voices and their activism became visible. It illustrated the ways in which the women activists perceived and prioritised their identities and allegiances to different groupings within the union. While some women, particularly those who defined themselves as feminists valued and were active in women's self organisation, others explained their allegiance to the other SOGs and/or 'mainstream' union structures with respect to class, sexual orientation, race or disability politics.

Although, it may seem surprising now, this paper was innovative within industrial relations and organisation research at the time because of its recognition that women were diverse and diversely politicised (Colgan and Ledwith, 1996c) and its exploration of the implications of that diversity for trade union activism and democracy. Despite their positioning as members of out-group(s), women did not necessarily identify as feminist nor act as a single gender interest group despite the potential offered by mechanisms such as proportionality, fair representation and the women's SOG within UNISON. The paper specifically drew on interviews with lesbians, black and disabled women plus a range of women across the union service groups to illustrate their differing perspectives, priorities and strategies. As Franzway (1998) argued acknowledging difference amongst women could threaten the 'tactical unity' required to make change to the predominantly male structures and cultures in place at the time.

Despite these concerns our study on women's activism confirmed that while it may be in *all* women's objective political interests to see women actively involved in processes of decision-making, it was not realistic to think that they would always agree when it came to union priorities and strategies (Cockburn, 1995). The paper pointed instead to the importance of 'transversal' coalition politics whereby women in different constituencies, although rooted in their own identity and membership, were prepared to shift to a position of exchange with women with different identities and memberships on matters of common concern (hooks, 1984; Yuval-Davis, 1998). Our discussion was informed by research on social identity theory (Tajfel and Turner, 1986; Kelly and Breinlinger 1996) and gender and race identity and politicisation (Miller et al, 1988) whereby we could show instances of social creativity (a social identity viewed as negative being seen more positively) and social change (to achieve change in material circumstances and objective social relations between groups). We used this framework in the paper to examine the ways in which feminists were trying to raise awareness of gender politics and feminist ways of organising within the union.

The paper provided examples of successful strategies of social creativity and social change and transversal working across SOGs at regional level but indicated that national women's self organisation was perceived to have been less successful in these achievements. As such, it addressed a gap in the industrial relations and organisation literature by identifying the ways in which women activists explained their identity and activism with respect to social movement and trade union politics. It drew out the implications of identity and class politics for self organisation, voice and participation within UNISON's new structures and considered the extent to which

women in UNISON were developing politicised identit(ies) and a base for collective action (Bradley, 1996: 27) through self organisation. These questions were also later explored by Healy et al. (2004) and this paper has been widely cited as the Google citations indicate (Appendix II), so contributing to scholarship in the gender and diversity field (Ledwith and Lotte Hansen, 2013).

**'Gender and diversity: reshaping union democracy,' Colgan, F. and Ledwith, S. (2002b)** continued the exploration of the potential for strategies of social creativity and social change and collective action via self organisation by women and other equality groups in two contrasting union environments, the GPMU and UNISON. First it reviewed debates on the ways in which UK trade union democracy needed to change to better reflect member diversity (Terry, 2000). However, where organising and equality agendas had been put in place, industrial relations research indicated that these agendas were driven 'top down' rather than 'bottom up' (Heery and Abbott, 2000).

Informed by insights from feminist research (Briskin, 1993; Healy and Kirton, 2000) this paper recognised that although representative systems such as reserved seats for women (and increasingly black, disabled and lesbian and gay members) may have met the constitutional requirements on numerical representation there was a disconnect from a gender (race or sexuality or disability) constituency. Instead it was argued that 'grass roots' equality activists had pushed for a more participative separate organising model. Separate organisation offered the potential to operate as a form of institutionalised faction (Healy and Kirton, 2000) although its success was argued to depend on maintaining a balance between 'autonomy' from the structures

and practices of the labour movement and 'integration' into those structures (Briskin, 1993: 101). This paper sought to explore this potential (and tension) via research within the two case study unions; the print union the GPMU a predominantly white, male (83%) private sector industrial union and the public service union UNISON, a predominantly female (72%) public service union.

Drawing on interviews with equality activists as appropriate in each union, it was clear that each union offered a very different environment structurally and culturally for strategies of social creativity and social change. The GPMU was a closed, centralised union which had established a women's committee and an equality committee. Women activists plus a small number of equality activists in the newly formed informal equality network groups linked to the equality committee, reported that equality structures had proved important in terms of providing safe space, support, education and the formulation of a women's and a broader equality agenda. Collective action to take that agenda forward had required transversal working (Yuval-Davis, 1998) with supportive male allies and the support of the predominantly male leadership which had both limited the agenda and the autonomy of the relatively new self organised structures.

In contrast, UNISON, an open union, had developed a more sophisticated system of proportionality, fair representation and self organisation. The SOGs were found to provide 'safe' space for women, black, lesbian and gay and disabled members to articulate and share common concerns often for the first time. Once armed with a sense of identity, a group agenda and activist skills by the SOGs the article provided evidence of transversal working and engagement with 'mainstream' union structures

to move that agenda forward. However, despite such collective action it was proving difficult to do so in part because of inadequate formal links between the SOGs and 'mainstream' structures and in part due to opposition to equality initiatives from some sections of the union. The paper concluded that marginalisation rather than a loss of autonomy was the problem faced by equality activists in UNISON. The paper thus made a useful contribution to the organisation equality and diversity literature by examining the opportunities for equality activists following union merger (McBride and Waddington, 2008). It also explored the dynamics within self organisation, as a new form of union democracy (Healy et al. 2004; Franzway, 2014) within two very different union cultures and contexts.

**'Gender, diversity and mobilisation in UK unions,' (Colgan and Ledwith, 2002c)**

built on the two earlier outputs by offering an evaluation of how far UK unions had travelled in establishing equality structures and self organisation. Although it drew on some of the same industrial relations literature concerning union renewal and democracy as the papers above, I would suggest that its specific contribution was that it set out to move the research agenda forward by focusing on changes within union structures and cultures to improve the representation of women, black, disabled and lesbian and gay members, rather than focusing solely on one equality group as much of the academic literature at the time was doing. In addition it considered the question posed by Colling and Dickens (2001) concerning the depth of commitment by UK unions to union renewal and equal opportunities via 'transformational change' (Cockburn, 1991). It did so by examining the perceived support for equality measures in the two case study unions, the GPMU and UNISON,



by drawing on a thematic analysis of interviews with both male and female respondents.

The first part of the chapter drew on secondary research data collected for the four equality groups, for example making available emerging data on discrimination on grounds of sexual orientation at work (TUC, 2000a) and on racism (TUC, 2000b), and summarising the progress made on the implementation of equality structures and measures within the TUC and 13 UK unions (gender, race, disability and sexual orientation). It then examined male and female member views on the equality structures within each union. During a time of dramatic change following merger in each organisation, structural changes had been made to introduce reserved seats and forms of self-organisation. Drawing on Cockburn's (1991) framework UNISON was considered to have adopted a transformational agenda whereas the GPMU had adopted a short agenda. Finally, the chapter drew on the interviews with female respondents to see whether they thought the formation of their new union had provided them with opportunities to develop equality work.

The breadth of the interview programme provided an opportunity to explore the commitment of members within these two unions to union equality initiatives and the range and depth of views held. Three schools of thought were identified and discussed in the chapter – opposition, support and qualified support. Those opposing the initiatives taken tended to do so by espousing traditional views on the democratic process in unions or on grounds that the proposals were 'unworkable' expressing concerns about 'special treatment' and self organisation getting 'out of control'. Support for the measures was more evident amongst the UNISON interviews

whereas qualified support was more prevalent amongst the GMPU interviewees. Women interviewees in both unions were more likely to express support than the men interviewed.

Finally the chapter considered the extent to which the women interviewed perceived their post-merger union structures and culture had provided them with opportunities to develop equality work. I think this 'evaluation' was fairly innovative, drawing as it did on analysis of interviews with a very diverse 'sample' of respondents across both unions. The chapter allowed the reader to hear the voices of those working within the new union structures to progress equality work. Drawing on their experiences, the paper concluded that although each union may have developed the internal voice mechanisms required to adapt to an increasingly diverse trade union membership (Kelly, 2000), a number of barriers still needed to be overcome to ensure the equality issues identified by equality activists could move forward (Dickens, 2000; Hansen, 2004; Williamson and Baird, 2014).

Now this statement will turn to consider the outputs from the HEESF research project which focused specifically on sexual orientation, organisation, equality and diversity. It is notable that this was the first time members of the research team, including myself, had worked on a research team where all of the members self-defined as LGB. We saw this as an opportunity to find our voices as LGB researchers. As we developed the project, we made time as a team to read and discuss the emerging literature on sexual orientation, sexuality and work and the literature on LGBT research philosophy and methodology. We noted that the available UK sexual orientation equality workplace literature was almost exclusively practitioner (TUC,

2000; Local Government Employer's Organisation, 2001; EOR, 2004; Stonewall, 2006). Alternatively, academic research focusing on sexual orientation and workplace issues at the time was almost exclusively North American (McNaught, 1993; Raeburn, 2004; Ragins, 2004; Creed, 2005; Croteau et al. 2008; Guiffre et al., 2008; Williams et al. 2009). The first paper we chose to write from the HEESF funded research project identified organisational good practice following the introduction of the Regulations from the point of view of LGB workers. **'Equality and diversity policies and practices at work: Lesbian, gay and bisexual workers' (Colgan et al. 2007)** set out to contribute to the academic literature concerning progress in UK organisation equality/diversity policy and practice (Cockburn, 1991; Creegan et al. 2003; Dickens, 2005; Ahmed, 2007) by focusing on the under-researched sexual orientation equality strand (Monro, 2006; Cooper, 2006; Ward, 2008) by drawing on the voices of LGB employees, coming forward to participate in the research.

The paper began by drawing on company key informant interviews (from 9 public, 5 private and 2 voluntary sector organisations) in order to explore the relative merits of the social justice, business and legislative compliance arguments as drivers of sexual orientation equality work (Liff and Dickens, 2000; Cooper, 1994; Dickens, 2005). Social justice and legal triggers were reported to be important factors driving sexual orientation work within the public and voluntary sector organisations. Private sector respondents said the business case for diversity was the major driving factor. Areas of good practice within the case study organisations were identified in order to contextualise the LGB employee interview data which was the main focus of the paper .

The paper's consideration of organisation policy and practice from the LGB respondent's points of view was considered crucial in making LGB people visible in organisation research and in giving 'voice' to their assessment of equality/diversity progress in practice. As such the paper made an important contribution to the UK organisation equality/diversity literature and to the second wave sexual orientation research agenda in the UK. It illustrated that according to LGB employees, an inclusive organisational response to sexual orientation was key to well being, organisational loyalty, productivity and retention (Colgan et al., 2006b). In addition, it identified elements LGB respondents saw as important to an inclusive workplace. The establishment of an LGBT company network group and a willingness to tackle homophobic attitudes and behaviour were two key indicators of inclusion. However, their perception was that senior and middle managers seemed to struggle with the latter. This resulted in an uneven application of policy and practice across organisations, supporting evidence of an implementation gap between equality policy and practice within organisations (Young, 1987; Creegan et al, 2003; Dickens, 2005). However, worryingly despite the introduction of the Regulations, there was a perception that the sexual orientation strand still posed particular problems for organisations (Cooper, 2006). Although not a panacea to tackling discrimination and harassment (Savage, 2007), the paper confirmed that the Regulations had been important in making LGB respondents feel more confident in challenging discrimination and harassment at work (Denvir et al., 2007) They had also provided an important and timely trigger to sexual orientation equality work by helping to shape organisational policy, practice and cultural change (Skidmore, 2004). These findings were explored further in our publications below.

**‘Equality and diversity in the public services: moving forward on lesbian, gay and bisexual equality?’ (Colgan et al. 2009)** focused on progress being made on LGB equality work within the public services following the introduction of the Regulations. This sector had been credited with having ‘pioneered’ sexual orientation equalities work in the UK (Carabine and Monro, 2004). In doing so the paper engaged with a growing body of equality/diversity and public policy research which suggested that the pace and direction of change required by the modernisation agenda was jeopardizing equal opportunities work in UK public services (Bailey and Jones, 2001; Conley, 2003; Ahmed, 2007). Other research was more optimistic (Breitenbach et al., 2002; Newman and Clarke, 2009) including sexual orientation equality work focusing on citizenship and service delivery (Carabine and Monro, 2004; Monro, 2007). Debates within the literature seemed to indicate that there were two contradictory directions of travel on sexual orientation equality work, firstly the one created by the recent positive legal changes<sup>3</sup> and secondly, the complex repercussions of the unfolding ‘New Labour’ modernisation agenda.

The paper explored the changing employment context within the public service organisations from the point of view of LGB employees and organisation key informants. It did so by focusing on the progress being made in 9 ‘good practice’ organisations – local government, schools and the fire service. It concluded that legislation such as the Regulations and the Civil Partnership Act (2004) had been an important trigger allowing public service organizations to kick-start or reinvigorate sexual orientation equality policy work. The Regulations had also made it more likely that public sector employees would feel able to take up a grievance about LGB discrimination at work. However, the impact on organisations in practice was reported

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<sup>3</sup> These included the repeal of the Local Government Act: Section 28 (2003), the Civil Partnership act (2004) and the Equality Act (SO) Regulations (2007) in addition to the Employment Equality (SO) Regulations (2003).

to be more limited. Thus trade union and some LGB respondents thought that the impact of the Regulations would not be fully felt until organisations were challenged by successful high profile tribunal cases in the public services.

The evidence for a business case for sexual orientation equality work was found to be contradictory. Managers were able to identify an increased need for monitoring and performance measurement linked for example to the Equality Standard for Local Government but admitted that financial stringency had led to limited resources for sexual orientation equality initiatives. For trade union representatives, the modernisation agenda had led to a proliferation of paper equality/diversity policies, the fragmentation of bargaining, restructuring and deterioration in member terms and conditions. LGB respondents perceived an implementation gap between policy and practice and some had begun to question whether the public sector could still be considered an 'employer of choice' for LGB people (Colgan and Wright, 2011).

The paper concluded that there did seem to be two directions of travel following the introduction of the sexual orientation equality legislation and the modernisation agenda. There was some evidence that LGB equalities work had become a normalized aspect of local authority provision to a degree (Monro, 2010) with the modernisation agenda providing opportunities for LGB people to 'champion' areas of sexual orientation equality work (Cooper, 2006; Monro, 2007). However, senior and line manager commitment to and resourcing of sexual orientation equality issues remained uneven (Dickens, 2005; Monro and Richardson, 2014). The Regulations had provided an invigorating trigger to sexual orientation equality work, but there still did not seem to be consistent application across equality strands (Harding and Peel,

2007). Therefore the paper joined others in supporting the need for an introduction of a public duty requiring all publicly funded bodies to proactively promote sexual orientation alongside other areas of equality work (Dickens, 2007; EHRC, 2011) and in expressing concern about the likely future impact of recession and public sector cuts (Conley and Page, 2010; Monro and Richardson, 2014).

In contrast, **'Equality, diversity and corporate social responsibility: Sexual orientation in the UK private sector,' (Colgan, 2011)** explored the triggers to the development of sexual orientation diversity policy and practice in the UK private sector. It drew on the perspectives of those 'championing' sexual orientation diversity work (LGB private sector employee perspectives were reported in Colgan and McKearney, 2011a). Prior to this paper, with the exception of research by Ward and Winstanley (2003) and Ward (2008), little UK academic research on sexual orientation had focused on policy and practice in private sector organisations. However, evidence from Stonewall's *Workplace Equality Index* (2011) indicated that increasingly large private sector organisations were outperforming public and voluntary sector organisations in developing good HR practice with respect to the sexual orientation strand. In particular, North American companies, in response to requests from LGBT employees, seemed to be extending what the North American literature termed 'gay-friendly' policies and practices (Guiffre et al. 2008: 254) to their European operations. In addition a focus on the private sector's sexual orientation equality work seemed timely given the Office for Budget Responsibility (OBR) was forecasting a decline in public sector employment between 2011 and 2017, with net growth taking place in the rest of the economy (OBR, 2011)

As indicated in the discussion of the development of sexual orientation equality initiatives in the public services, UK literature on equality and diversity had questioned the implications of a social justice, legislative and business driven equality and diversity agenda for practice (Greene and Kirton, 2009; Tatli, 2010). This paper set out to consider the importance of these triggers within a private sector context. It first charted the historical trajectory of sexual orientation equality initiatives in each company identifying triggers and patterns of diffusion. This included a consideration of the inclusion of sexual orientation in key policies; the establishment of LGBT networks; participation in LGBT diversity benchmark activities (e.g. International Business Equality Index, Stonewall Workplace Equality Index) and the application of UN and ILO Conventions to justify and frame equality/diversity policy (e.g. United Nations Global Compact). It also drew on the interviews with 22 key informants (diversity specialists, management, trade union and LGBT network representatives) to explore their views on factors influencing progress on corporate sexual orientation equality work.

A differentiating feature of the research in the five private sector case studies (compared to the public service and voluntary service organisations) was that these organisations were required to champion sexual orientation equality work in a global context. In contrast to public and voluntary sector organisations, managers in the private sector organisations argued that business objectives rather than legislative compliance were the major impetus to sexual orientation equality work, although differences by country of origin were discerned (Ferner et al. 2005). However LGBT network and trade union representatives disagreed, taking the view that the



Regulations had been important in putting the sexual orientation strand on a par with other equality strands in UK operations.

The key finding emerging from the research within the private sector organisations was the perceived importance of the corporate social responsibility (CSR) agenda in driving equality/diversity work within large private corporations. Despite recognised shortcomings (Fichter, 2013) CSR was considered to offer a broader unifying vision for sexual orientation diversity work in a global context. It was deemed to provide a useful umbrella term covering social justice, legislative and business case rationales which was understood by managers and was therefore helpful to those championing sexual orientation equality work. However, respondents agreed that flexibility was required in the cross-national transfer of sexual orientation diversity policy and practice, in order to respect local cultures and legislative frameworks (Ozbilgin and Tatli, 2008). This paper addressed the research gap concerning the opportunities and challenges of sexual orientation equality work in the UK private sector (Ineson et al., 2013) and made a useful addition to the developing literature on socially responsible IHRM (Shen, 2011; Alcazar et al., 2013; Jonsen et al. 2013).

**‘Visibility and voice in organisations: Lesbian, gay, bisexual and transgendered employee networks’ (2012)** explored whether LGBT trade union groups and company employee network groups (hereafter CNs) provided mechanisms for visibility and voice for LGBT employees within UK organisations. The decline of trade unions and non-unionisation in growing sectors of the economy had led to concerns about ‘employee voice’ mechanisms (Bell et al., 2011). This in turn had led to an interest in the role of new industrial relations actors including CNs in UK

workplaces (Williams et al., 2010). Research in the US had charted LGBT campaigns to establish a 'gay-friendly' workplace via CNs (Raeburn, 2004; Githens and Aragon, 2009). However, research on LGBT activism via LGBT CNs and trade union groups in UK workplaces was limited (Stonewall, 2005; Colgan et al., 2006). The paper addressed this gap by exploring the corporate rationale for the establishment of LGBT CNs and LGB employee perceptions of the ways in which LGBT CNs and trade union groups provided mechanisms for LGBT voice and visibility.

The paper was informed by Bowen and Blackmon's (2003) research on the ways in which groups such as LGBT workers may become 'silenced' in organisations. This suggested that where an LGB person does not feel able to express his/her identity at work, then this may lead to a second spiral where silence about personal identity can escalate to silence on other issues. To overcome this silence, it had been argued that organisations seeking to address issues of voice and visibility needed to adopt a range of individual and collective voice mechanisms to facilitate the expression of LGBT (and other minorities) voice in heterosexist environments (Bell et al., 2011). My paper focused on LGBT CNs and trade union LGBT groups as providing two such voice mechanisms within the UK public, private and voluntary sector case studies. It indicated the importance of LGBT activism in driving the establishment of these groups. For example, LGB respondents saw the establishment of an LGBT CN as a major indicator of inclusion and thus a key ingredient of a 'gay-friendly' workplace (Colgan et al. 2006; McPhail et al., 2014). Echoing findings from my earlier research, LGBT CNs and trade union groups provided 'safe' self-organised space within which it was possible to develop group identity, consciousness and articulate strategies for change (**Colgan and Ledwith, 2000, 2002b**)

The paper concluded that LGBT CNs and trade union groups did provide mechanisms for visibility, individual and collective voice and so were proving helpful in addressing the vacuum of responsibility in diversity management identified by Greene and Kirton (2009). Thus far, despite minor tensions, (Githens and Arogan, 2009) rather than providing competing routes (Healy and Oikelome, 2007), LGBT CNs and trade union groups were perceived to provide complementary mechanisms for voice and visibility for LGBT employees. This was important as their membership was drawn from slightly different constituencies. However, the paper recognised that LGBT CNS were relatively 'new actors' within the 16 case study organisations and concluded that more research would be required to see whether both LGBT CN and trade union groups would be able to maintain their momentum, or become 'diluted and distorted to fit into bureaucratic activities' as cautioned by Humphrey (1999b: 147) particularly at a time of economic recession. There seems to have been considerable interest in the material covered by this paper (Burke and Cooper, 2013; Monro and Richardson, 2014) as it is currently one of the five most cited articles from the Equality Diversity Inclusion journal. It also won the *Equality, Diversity and Inclusion: An International Journal* 2013 Outstanding Paper Award.

The final output, '**Organisational life within a UK good practice employer: The experiences of black and minority ethnic and disabled LGBT employees,**' (2014) was informed by theoretical developments within feminist and race studies. I learned of intersectional analysis initially by reading Adib and Guerrier (2003), then the original research on intersectionality by Crenshaw et al., (1995) and McCall (2005) followed by the emerging literature on intersectionality and sexuality (Taylor et al. 2011). Intersectional analysis was exciting as it offered the opportunity to move away

from a simplistic additive approach to diversity strands. It provided an analytical framework indicating how 'dimensions of difference' frame identity and interweave to shape people's perceptions and experiences of organisational life (Dill et al., 2001: 4). It provided a new way of conceptualising identity and diversity, which had been a central concern in my earlier publications (**Colgan and Ledwith, 2000; 2002b**). This chapter emerged from my interest in understanding the ways in which sexual orientation and gender identity may intersect with other dimensions of difference. Further, as I read the literature considering the implications of diversity amongst LGBT people, two important gaps in the UK academic literature became evident. One concerned the employment experiences of disabled LGBT people and the second concerned LGBT people from black and minority ethnic (BME) communities (Mitchell et al., 2008).

Some time ago, Humphrey (1998: 600) raised the interesting ethical question for academics and activists concerning who should tackle the 'mountain of empirical work' required to develop understanding and action in the equalities field. She asked whether as a non-disabled person she had a 'right' or a 'duty' to research and write about disabled people in the trade union movement. She concluded this question would best be answered in the first instance by her own conscience and 'in the second by the voices and writings of disabled peoples themselves'. This discussion was useful in encouraging me to write this chapter (as a non-disabled, LGBT person from a white, Irish background) in order to address the research gap identified above.

Thirty LGBT people who had self-defined as BME and/or having a disability had taken the time to participate in the HEESF research project. I thought it was

important to draw on their insights in order to make visible the experiences of both disabled and BME LGBT people in UK workplaces. The research took place within 'good practice employers,' and most of these organisations had developed good practice across all equality strands (Colgan et al. 2006). It also took place following the introduction of the Regulations and the Gender Recognition Act (2004). The UK had begun to revamp its equality legislation to move to a more integrated approach to equalities via the establishment of the Equality and Human Rights Commission (EHRC) and the Equalities Act (2010). The argument was that the move to a single equality regime could deliver a more consistent approach to the equality agenda (Squires, 2010) although others expressed concerns about the establishment of a more generic framework with a possibly less well resourced single equality body (Dickens, 2007).

Four major themes emerged from the research. Firstly most interviewees said they had sought out 'good practice employers' in their desire to work in an inclusive workplace. However, although, all perceived their employers had made progress on equality and diversity policy and practice in recent years, their perception was that sexual orientation and transgender issues were not accorded the same status as the other equality strands (Colgan et al., 2009; Richardson and Monro, 2012). Acker (2002: 202) had pointed to the importance of acknowledging the views of different organisational participants by dimensions of difference in order to make visible the 'normal violence' of organisational life. This was borne out in the research. It was striking that most of the LGBT respondents did not find their organisations particularly comfortable places to be. They did not see themselves reflected in the organisation hierarchies. Some reported feeling isolated and lacking in role models, although CNs

and trade union equality groups were acknowledged to be an important source of contact and support (**Colgan, 1999; Colgan and McKearney, 2012**). A number described discriminatory working environments. These LGBT respondents said that they were more likely to move to escape complex situations of discrimination and harassment than challenge them by taking a formal grievance (Ryan-Flood, 2004).

A third emergent theme concerned the effort and skills required to frame and manage identity, visibility/invisibility and disclosure with respect to sexual orientation and gender identity and other dimensions of difference. It required a lot of energy to manage workplace labels, interactions and expectations. The fourth theme concerned the respondent's desire not to have to hide key aspects of identity at work. They thought that an inclusive workplace which valued diversity could benefit both employer and employee. Respondents provided examples of the ways in which they had been able to introduce insights to improve working environment and product and service delivery.

The chapter concluded the research had been useful in contributing to the exploration of 'intersectionality as a lived experience,' (Taylor et al. 2011: 4). It also argued the need for more research on the diversity of LGBT experiences at work in order to develop appropriate action in tackling discrimination in the workplace on multiple grounds (Moore et al., 2011). It was argued that such research was urgently needed following the Conservative Liberal Democrat coalition government's decision to strip back the provision on dual discrimination within the Equalities Act. (Department of Business, Innovation and Skills, 2011).

#### **4. Conclusion**

The conclusion builds on the previous section to locate the published outputs as an original contribution to the advancement of sexual orientation organisation and equality research in the UK and North America as this is where the research agenda is most developed (Colgan and McKearney, 2011). The outputs form a coherent body of work advancing knowledge and understanding of the following:

- a) To examine the rationale for and drivers of sexual orientation equality work in UK trade union, public, private and voluntary sector organisations over the last two decades;
- b) To identify the equality/diversity structures, policies and practices organisations have introduced in order to make organisations more inclusive of LGB people;
- c) To explore LGB people's perceptions and experiences of these sexual orientation equality and diversity policies and practices;
- d) To reveal LGB people's voice, activism and agency in influencing the changes taking place.

Although research early on recognised that sexuality pervades every aspect of organisation and society (Hearn and Parkin, 1987; Hearn et al. 1989; Franzway, 2001) it has been argued that this is still unacknowledged in much organisation and management research (Bowen and Blackmon, 2003; Bell et al. 2011). UK and North American organisational research on sexual orientation and sexuality has usefully been summarised via a wave metaphor (Ozturk, 2011; Ozeren, 2014). The research agenda has been developing in waves at different paces in different countries subject

to social, political and legal context and mobilisation of LGBT communities. Not surprisingly, this research agenda is little developed in a number of countries in Africa, Asia and the Middle East where sexual orientation remains a 'taboo' topic (Ozturk, 2011; Colgan and McKearney, 2011b). Backlashes can also occur. For example, organisation equality and diversity initiatives have received a substantial setback in Russia following the introduction of legislation by the Russian Parliament, signed by President Putin in 2013, banning propaganda on 'non-traditional sexual relations' (Colgan and McKearney, 2014).

The first research wave in the UK and North America, mainly by LGBT researchers sought to counter the fear of homosexuality and the behaviour emanating from it i.e. homophobia by making lesbian and gay people visible, telling their 'stories' and documenting and supporting campaigns for 'civil rights' (Adam, 1987; Herek, 1990; Weeks, 1998). It also aimed to spotlight the extent of discrimination and harassment experienced by lesbian and gay people at a time when legal and organisational protections were absent (Levine, 1979; Palmer, 1993; Levine and Leonard, 1984; Busby and Middlemiss, 2001). McNaught's (1993) research is of note as it was ahead of its time in articulating a social justice and business case to encourage US employers to address lesbian and gay issues in the early 1990s. Given the difficult prevailing climate, studies also focused on the ways in which lesbian and gay people organised politically as both workers and service users to improve employment and service provision (Cooper, 1994; Epsten, 1994).

My ESRC research publications have contributed to this first wave research agenda in line with the research objectives cited above via their early focus on the rationale



for and analysis of the ways in which trade unions began to improve structures for voice and representation of 'minorities' including lesbian and gay people (**Colgan, 1999; Colgan and Ledwith 2002c**). The research revealed the influence of lesbian and gay trade union activism in contributing to the campaigns to improve equality and diversity structures, policies and practices in UK trade unions (**Colgan, 1999; Colgan and Ledwith 2000, 2000b**). It also explored lesbian and gay member's perceptions and experiences of the resulting sexual orientation equality and diversity policies and practices (**Colgan, 1999, Colgan and Ledwith, 2000, 2002b**). Other early research on sexual orientation and trade unions included Humphrey's work in the UK (1999; 2002), Krupat and McCreery's work in the US (2001) and Hunt's edited international volume on *Labouring for Rights* (1999). Subsequent LGBT and 'mainstream' organisation, equality and diversity work has made reference to my pioneer research in this area as evidenced above and by the Google citations data (Appendix II).

The HEESF project was developed at the beginning of the second wave of sexual orientation/sexuality research. This second wave built on the first wave literature. It developed as LGB<sup>4</sup> people were gaining legal and institutional protections and thus some recognition in the public sphere (Ozturk, 2011). Its early research agenda focused on the implementation of and the effectiveness of these organisational (Ryan-Flood, 2004; Monro, 2006; Cooper, 2006) and legal protections (Skidmore, 2004; Weeks, 2007). It also considered the implications for LGB people managing their identities and careers at work (Seidman, 2002; Ragins, 2004; Ward and Winstanley, 2006; Rumens and Kerfoot, 2009). The North American literature took a lead in beginning to identify the ways in which working environments could be made

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<sup>4</sup> At this stage, sexual orientation research and activism became more inclusive of bisexuals hence the increasing use of the acronym to LGB (Monro, 2005).

more inclusive and 'gay-friendly' from the LGB point of view (Correia and Kleiner, 2001; Raeburn, 2004; Guiffre et al. 2008).

My five HEESF publications made an original contribution to this second wave research agenda by drawing on the first UK large-scale study to consider sexual orientation at work following the introduction of the Regulations. My HEESF publications have explored the rationale for and progress being made in establishing inclusive and 'LGB-friendly' UK policies and practices (**Colgan et al., 2007, Colgan et al., 2009; Colgan, 2011**). Crucially, they did so by drawing on the perspectives of LGB employees (**Colgan et al, 2007: Colgan et al, 2008; Colgan, 2014**) and by taking account of the diverse perspectives of a range of organisational stakeholders (**Colgan et al., 2009, Colgan and McKearney, 2011a) Colgan and McKearney, 2012**) in different organisational contexts (**Colgan et al., 2009; Colgan, 2011**). **Colgan and McKearney (2012)** specifically focused on the contribution made by LGB people's voice, activism and agency in influencing these changes. Google citations data indicates that these publications are being well used by colleagues in the organisation, equality and diversity field. For example, **Colgan et al. (2007)** has been cited 57 times since it was published in 2007 (Appendix II).

The research outputs above have been important in providing research evidence to meet the PhD research aims. They have been widely cited in debates on the organisational progress being made on sexual orientation equality issues at a time of growing legal and institutional protections (Monro and Richardson, 2014; Priola et al., 2014). They have also succeeded in making LGB people's voice mechanisms plus their views, experiences and activism visible within UK organisation and equality

research (Kaplan, 2014; Rumens, 2014). However, it might be argued that the research publications cited above have been primarily empirically rather than theoretically driven. For example, Creed (2005) has criticised first and second wave sexual orientation organisational research for being limited theoretically and methodologically. Colgan and Rumens (2014) in defence, have countered that sexual orientation scholarship is 'coming of age' as it is increasingly being informed by feminist, race studies and intersectionality, poststructuralism and queer theory.

Colgan and Rumens (2014a) have identified an emerging third wave of organisation research, within which the acronym LGB has been extended to include transgender, intersex, queer or questioning people (LGBTIQ). Accompanying this, there has been a growing interest in examining the diversity across and within the LGBTIQ acronym in different historical, geographical and cultural contexts (Kulpa and Mizielska, 2011; Colgan and McKearney, 2014; Colgan and Rumens, 2014b; Ozturk and Ozbilgin, 2014). In the UK, this has opened the door to in depth studies of gay men (Rumens, 2011) lesbians (Colgan et al. 2008; Wright, 2013; McDermott, 2014), bisexuals (Green et al. 2011) and trans people (Hines, 2010). It has also encouraged a move away from essentialist categories and dichotomies to address broader issues of sexuality, identity and difference through new theoretical lens including poststructuralism and queer theory (Ward, 2008; Browne and Nash, 2010; Simpson, 2014; Rumens and Broomfield, 2014). Another influential approach drawn from Black feminism is intersectionality (Monro, 2010; Taylor et al, 2011; Monro and Richardson, 2014; Wright, 2013).

**Colgan (2014)** was offered as an original contribution to this third wave of LGBT UK research. It used an intersectional analysis (Crenshaw et al., 1995) to address the research gap in the academic UK organisation equality and diversity literature concerning the ways in which LGBT identities intersect with disability and ethnicity. The interviews with BME and disabled LGBT employees provided new critical insights concerning inconsistencies in commitment to and pace at which equality and diversity structures policies and practices have been introduced and implemented in organisations. They also revealed the ‘normal violence’ (Acker, 2000: 202) faced by BME and disabled LGBT employees even in UK good practice workplaces and indicated the perceived difficulty of tackling discrimination in the workplace on multiple grounds (Wright et al. 2011). Trade union and LGBT company network groups were identified as important sources of voice, support and inclusion (**Colgan and McKearney, 2012**). This chapter added to the emerging literature exploring sexual orientation, sexuality and other dimensions of difference including age (Cronin and King, 2010; McDermott, 2011); gender and class (McDermott, 2010, 2014; Taylor, 2010); gender and religion (Yip and Nynas, 2012). It also contributed to the literature questioning the notion of the ‘gay-friendly organisation’ whilst placing a spotlight on heteronormative power relations at work (Williams and Giuffre, 2011; Priola et al., 2014; Rumens, 2014). Further research in this area may benefit by recognising ‘intersectional sensibilities’ (Healy et al. 2011) and exploring the processes which produce and re-create organisations as ‘inequality regimes’ (Acker, 2006: 441). Here Simpson and Lewis’s (2007) differentiation between surface and deep conceptualizations of voice and visibility also promises to be useful.

As Colgan and McKearney (2011a, 625) suggest, it is clear when it comes to voice, visibility and sexual orientation research, 'much has been done but much is yet to do.' My future publications will continue to contribute to first, second and third wave sexual orientation/sexuality organisation, equality and diversity research agendas. However, it must be acknowledged that most of the publications cited here were a product of research conducted at a fairly optimistic time for LGBT equality in the UK. A time when inclusive workplace policies and practices were emerging as evidenced by my EHRC research, *Integration in the Workplace: A study of Age, Religion or Belief and Sexual Orientation* (Bond et al., 2009). It is now clear that future research and published outputs will need to be alert to a much less positive context and climate.

In the UK, following the establishment of the Conservative Liberal Democrat coalition government in 2010 and as evidenced by *Staying Alive: Impact of "Austerity Cuts" on the LGBT Voluntary and Community Sector* (Colgan et al. 2014), a number of civil society organisations, including LGBT organisations have been negatively effected by cutbacks. An awareness of this changing political, economic and social context is important because it reminds us that that what has been hard struggled for and won may also be lost. This is unfortunate, given the LGBT VCS has traditionally been an avenue for voice, visibility and community for the LGBT communiti(es), particularly the young, sick and vulnerable.

Moving from the UK, to an even bleaker situation, the backlash to some minor gains on LGBT rights in Russia is evident from our research on *Equality, Diversity and HRM in Russia* (Colgan and McKearney, 2014). We began this research in May 2012

prior to the introduction of the legislation banning propaganda on 'non-traditional sexual relations.' This national legislation has made it illegal to equate heterosexual and homosexual relationships. However, it is evident since this time that the early progress we observed on LGBT rights in Russian society and within multinational companies under the auspices of CSR has been severely curtailed (Itaborahy, and Zhu, J., 2014).

Thus sadly, the wave metaphor summarising sexual orientation and sexuality research is not inevitably a progressive one as equality gains may be jeopardised, stalled and even reversed (Colgan and Rumens, 2014b). Whilst acknowledging this, on a more positive note this dissertation can conclude that progress has been made over the last two decades in raising LGB voice and visibility and in tackling the invisibility of sexual orientation within UK organisation equality and diversity research. It also welcomes the addition of gender identity to include transgender issues and the broader focus on sexuality in organisational research in recognition that desire is not fixed or essential (Monro and Richardson, 2012). Hopefully the latter will signal a growing and broadening interest in exploring sexuality and gender beyond sexual minorities in the workplace (Simpson, 2014).

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## Appendix I: Google Scholar citations for prior output publications (12-10-14)

Title	Cited by	Year
Recognising the lesbian and gay constituency in UK trade unions: moving forward in UNISON? F Colgan Industrial Relations Journal 30 (5), 444-463	37	1999
Diversity, identities and strategies of women trade union activists F Colgan, S Ledwith Gender, Work & Organization 7 (4), 242-257	85	2000
[Book] Gender, diversity and trade unions: international perspectives Routledge	82	2002
Gender Diversity and Mobilisation in UK Trade Unions F Colgan, S Ledwith Gender, Diversity and Trade Unions: International Perspectives 6, 154	20	2002
Gender and diversity: reshaping union democracy F Colgan, S Ledwith Employee Relations 24 (2), 167-189	47	2002
Equality and diversity policies and practices at work: lesbian, gay and bisexual workers F Colgan, C Creegan, A McKearney, T Wright Equal Opportunities International 26 (6), 590-609	53	2007
Equality and diversity in the public services: moving forward on lesbian, gay and bisexual equality? F Colgan, T Wright, C Creegan, A McKearney Human Resource Management Journal 19 (3), 280-301	30	2009
Equality, diversity and corporate responsibility: Sexual orientation and diversity management in the UK private sector F Colgan Equality, Diversity and Inclusion: An International Journal 30 (8), 719-734	11	2011
Visibility and voice in organisations: lesbian, gay, bisexual and transgendered employee networks F Colgan, A McKearney Equality, Diversity and Inclusion: An International Journal 31 (4), 359-378	14	2012
Organisational life within a UK 'good practice employer': The experiences of black and minority ethnic and disabled LGBT employees F Colgan Sexual Orientation at Work: Contemporary Issues and Perspectives	No citations as yet	