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**U.S. Army Research Institute
for the Behavioral and Social Sciences**

Research Report 1657

Perspectives on Organizational Change in the Canadian Forces

Franklin C. Pinch
Human Resources Consulting

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Research Report 1657

**Perspectives on Organizational Change
in the Canadian Forces**

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FOREWORD

This research was initiated in response to the proposal to lift the ban on homosexuals in the U.S. military. The research reported here was conducted by Franklin Pinch, an independent consultant from Dartmouth, Nova Scotia; retired Colonel, Canadian Forces; and former Director, Personnel Psychology and Sociology within the Department of National Defence. This research offers a perspective on the experiences of the Canadian Forces in lifting the ban on homosexuals, which was done in October 1992.

This research complements ARI Research Note 93-17, Comparative International Military Personnel Policies, edited by Professor Gwyn Harries-Jenkins of the University of Hull.



EDGAR M. JOHNSON
Director

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Any errors of fact, omissions of pertinent details, or misinterpretation of the information available are the sole responsibility of the author.

PERSPECTIVES ON ORGANIZATIONAL CHANGE IN THE CANADIAN FORCES

EXECUTIVE SUMMARY

Requirement:

The U.S. Army Research Institute for the Behavioral and Social Sciences was tasked by the Deputy Chief of Staff of the U.S. Army to conduct research on lifting the ban on homosexuals serving in the Armed Forces. Part of this requirement was to gather systematic information on the experiences of the Armed Forces of other nations. This report contributes to the requirement by providing a review and synthesis of the background literature and other documentation relating to transition from a homosexual ban to the cancellation of the exclusionary policy in the Canadian Forces (CF).

Procedure:

Perspectives from the open literature were reviewed to provide the conceptual basis for systematic analysis of policy and research documents. Only those documents available to the public--including media references--were included in the investigation.

Findings:

Impetus for policy change emanated from recently implemented social legislation supported by Canadian public opinion and reinforced by associated political and legal pressures. Specifically, the enactment of equality rights legislation in 1978 and 1985 forced a review of exclusionary policies of the CF in five areas--including sexual orientation--and gave rise to legal challenges under provisions of the Canadian Human Rights Act and the Charter of Rights and Freedoms. Sexual orientation policy was challenged under Section 15 (Equality Rights) of the Charter. Extensive review and study over a 6-year period failed to provide research or other evidence to justify or defend the exclusionary policy for homosexuals as a fair and reasonable limit on their rights in a "free and democratic society." The Federal Court of Canada declared the CF in violation of the Charter, and the policy was canceled in October 1992.

The impact of the policy change has been minimal. Negative consequences predicted in the areas of recruitment, employment, attrition, retention, and cohesion

and morale have not occurred in the 6-month period since revocation of the exclusionary policy. There is no indication that homosexuals are declaring themselves. The major consequence for the CF has been the requirement to negotiate settlements with those homosexual former members who were dismissed and have filed a Human or Charter rights complaint or to compensate serving members who were disadvantaged under the exclusionary policy.

Several factors may account for the lack of effect, among them the introduction of policy and procedural safeguards, including a zero tolerance policy on sexual misconduct for both homosexuals and heterosexuals. Other factors may include the role of leadership, the long-held expectation of the policy change, force reduction, the low level of recruitment, and generally poor job market conditions that may have masked or delayed the effects.

Utilization of Findings:

Although these findings are specific to the CF, they should help inform the current debate on homosexual exclusion policy in the U.S. Armed Forces.

PERSPECTIVES ON ORGANIZATIONAL CHANGE IN THE CANADIAN FORCES

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PERSPECTIVES ON ORGANIZATIONAL CHANGE IN THE CANADIAN FORCES

INTRODUCTION

Purpose of the Report. This report provides information that is complementary to research being undertaken by the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) for the Deputy Chief of Staff for Personnel of the U.S. Army on the topic of lifting the ban on homosexuals serving in the United States (U.S.) Armed Forces. Specifically, the aim is to review the background literature and other documentation, from the 1960s to the present, regarding the change from prohibition of known homosexuals to serve in the Canadian Forces (CF) to the cancellation of the prohibition policy, which became effective on 27 October 1992. It is intended to: offer a conceptual framework in which the issue may be viewed; provide a contextual overview of the social change environment in which the CF operate; synthesize the available information on changing sexual orientation policy within the CF; and assess the consequences of the policy changes involved in the transition process.

Background. The U.S. government and military officials are currently in the process of examining the arguments for and against lifting the ban on permitting homosexuals to serve openly in its Armed Forces, and ARI is conducting a broad examination of the evidence from the militaries of other nations. To this end, a statement of work related to policy change in the CF was agreed upon 2 April 1993, between the contractor and ARI. A list of documents and outline of events leading up to cancellation of the CF policy have been provided separately. This report brings the source information together in a unified report.

METHOD

Data Sources. The data sources for this report are the open literature and unclassified Canadian government documents, accessible by the public, as well as completed research studies and research reviews. The documents cover roughly a 30-year period, but most have been produced within the past five to eight years. They are primarily centered on the specific topic of sexual orientation research, policy and regulations.

This report is limited by the fact that the policy change on homosexuals arose partly out of a requirement to defend the homosexual prohibition policy in the Federal Court of Canada. Therefore, part of the information is protected by solicitor-client privilege. Relatedly, other documentation is protected under Cabinet confidence provisions of the Canadian Access to Information Act and is unavailable to the author. Also, access to discussions among CF policy makers, justice officials, officers of the court and consultants, that might have shed light on the interpretations made in their deliberations, has not been available to the author. These limitations affect the level of detail provided, but they neither detract from the identification of influencing factors nor do they invalidate the overall conclusions reached.

TWO CONCEPTIONS OF THE MILITARY

The sociological issues involved in understanding military organizational change associated with lifting the ban on homosexuals and resistance to such change have elsewhere been documented for social change in general (Pinch, 1991). On the one hand, as suggested by Harries-Jenkins and Moskos (1981) and Segal and Segal (1983) are traditional conceptions of the military as a unique, masculine, cultural environment, characterized by: social solidarity based on likeness (rather than differences); traditional authority structures and sanctions; and, individual constraints and obligations to the institution or group. These characteristics are seen to form the

basis of group cohesion, motivation and morale, and, ultimately, operational effectiveness (c.f., Henderson, 1990; 1991; 1992). The image of the entire institution is based on the requirements of the core combat segment, from whence flows an all-encompassing ideology of homogeneous norms, manifested in political and social conservatism (Huntington, 1957), a collective orientation and unlimited liability on the part of military members. In systems terms, the ideal military under this conception is a closed, ascriptive institution, that sharply diverges in its norms and values from other institutions in its host society. This conception may be called the operational imperatives model, since its adherents tend to argue that failing to maintain these traditional features and proscriptions-- including the exclusion of specific social categories-- will lead to a reduction in operational effectiveness and ultimate failure of the military to achieve its mission: that is, to successfully wage war on behalf of the nation, when legitimately called upon to do so (c.f., Loomis and Lightburn, 1980; Cotton, 1981).

On the other hand are modern conceptions of the military as a highly differentiated, complex bureaucracy, rationalized and formalized along lines similar to other utilitarian organizations: especially so for mainly peacetime or constabulary militaries (Scott, 1981). Further, since the military is, by necessity, an open system, it is penetrated by, and overlaps with, civilian society on the occupational, professional and institutional levels (Janowitz, 1960, 1971), and exhibits patterns of organization, management and interpersonal interaction that are convergent with those found in other, civilian large-scale organizations (Lang, 1973).

This conception does not deny the need for team performance, collective action, and unique mission orientation, but it does view the ideal military in a democratic society as closely integrated with, and more or less representative of, its host society (see, e.g., Cotton et. al., 1978). It recognizes, also, that all-volunteer forces (AVFs) operate on market principles that place them in direct competition with other institutions for both new recruits and those fully or partly trained (Pinch, 1982),

who are seen to be motivated primarily by economic factors (Moskos, 1977; Segal and Segal, 1983) (although some analysts, e.g., Faris 1984, see non-economic factors being implicated as well). Structurally, the assumption is one of a formal contractual, limited obligation between the individual and the military: that is, individual service in return for monetary rewards and other incentives (Moskos, 1973, Segal *et. al.*, 1974), rather than on informal arrangements which are binding on the individuals and determined exclusively by the military institution.

The above may be termed the social imperatives model, since its adherents tend to argue that failure of the military to incorporate dominant social and cultural value trends -- e.g., equality of employment opportunity -- is likely to lead to various forms of disruption and withdrawal of public support, which, ultimately, threatens its survivability (*c.f.*, Olson, 1978; Kasurak, 1982; Pinch, 1982; Segal, 1993).

The operational imperatives and social imperatives models are analytic distinctions only and, as such, both simplify and exaggerate the differences found in the literature (e.g., Moskos, 1971, 1978; Hauser, 1973; Bradford and Brown, 1973; Cotton, 1979, 1981; Cotton and Pinch, 1985). However, the opposing models and images are useful in examining the issue of human and equality rights and freedoms in the military. Since issues involved are linked to both progressive rationalizing trends and dominant social value trends (Segal and Segal, 1983; Segal, 1993), and since irrefutable evidence (usually of a scientific and empirical nature) is necessary to obtain exemptions under Canadian legislation, the operational imperatives model is progressively weakened and, concomitantly, the social imperatives model is strengthened.

Nonetheless, in areas where the exemptions are demonstrably consistent with societal trends or are otherwise empirically supported in relation to institutional requirements, then the operational imperatives model holds. For example, this has been the case with respect to retention of a compulsory retirement age in the CF.

Despite the interplay between the two models, the general shift is definitely toward the social imperatives model--certainly in Canada and, to a greater or lesser extent, in other Western militaries as well (*c.f.*, Segal, 1993). This trend is likely to be accelerated under conditions that prevail in the Post-Cold War period (Moskos, 1991; Segal, 1993). That being said, when it comes to decisions on policy change involving social issues, such as the lifting of restrictions on the employment of women or homosexuals in the armed forces, it can be seen that these models may well come into conflict. In such cases, empirically based arguments carry considerable weight. Beyond that are considerations of which values represent the greater social good (*c.f.*, Macrae, 1976), in whatever manner that is determined. In this regard, the context of change, including the degree to which legislation prescribes such change, is likely to be consequential to the final decision.

THE CONTEXT OF CHANGE IN THE CANADIAN MILITARY

Canada is, officially, both a bilingual (English and French) and multicultural society. Demographically, socially and culturally, Canadian society is decidedly pluralistic: typified not only as a cultural mosaic, but having been said to contain "mosaics within mosaics" (Bibby, 1990). In short, it has significant concentrations of identifiable ethnic and cultural groups, such that the "management of diversity" has become an integral part of Canadian institutional and organizational mandates (*c.f.*, The MacDonald Series, 1993).

As in other Western militaries operating under the AVF format, Canada's armed forces have had to accommodate substantial economic, social, political and technological change over the past three decades. For example, in the mid-1960s it was for reasons of cost-reduction and elimination of duplication and redundancy that the three separate services (navy, army and airforce) were amalgamated into a single unified force. Other internal policy changes have also brought the CF closer to the mainstream of Canadian society (Cotton *et.al.*, 1978; Pinch, 1982).

However, the most far-reaching impact on the CF has resulted from social change that has received expression in legislation in the form of increased individual, human or equality rights and freedoms. Over a period of slightly more than a decade, the Canadian Parliament has passed legislation that explicitly bans discrimination on a number of grounds, formally guarantees the rights and freedoms of individuals and generally encourages social representation and democratization within all institutions of Canadian society. To these we shall now turn.

LEGISLATION AFFECTING INDIVIDUAL RIGHTS AND FREEDOMS

The legislation is contained in seven acts (Pinch, 1991b), passed or amended between 1971 and 1988, which include: the Official Languages Act; the Access to Information Act; the Privacy Act; the Canadian Human Rights Act (CHRA); the Charter of Rights and Freedoms (Charter); the Multicultural Act; and, the Employment Equity Act. In one way or another, they all offer protection and/or guarantees for individuals in general, or for those within identifiable groups, in particular. The cumulative impact of this legislation has been to shift a great deal of power away from institutions and, potentially, at least, into the hands of individual Canadians. This shift, backed by strong enforcement agencies and the legal system, has been primarily responsible for bringing about social reform and increased democratization in the CF and elsewhere. (For a full discussion of the above legislation, see Pinch, 1991b).

Human and Charter Rights. Legislation with by far the most profound effect on Canadian government institutions, including the military, is contained in the Canadian Human Rights Act (CHRA) and the Charter of Rights and Freedoms (Charter) (Government of Canada, 1978, 1987). Enacted in 1977 and proclaimed in March, 1978, the CHRA is couched in the language of social equality and individual rights. For example, Section Two states:

Every individual should have equal opportunity with other individuals to make for himself or herself the life that he or she is able and wishes to have consistent with his or her duties and obligations as a member of society.

The CHRA prohibits discrimination on ten grounds: race, national or ethnic origin, colour, religion, age, sex (including pregnancy and childbirth), marital status, family status, a pardoned conviction, and physical or mental disability (including disfigurement and dependence on drugs or alcohol).

The CHRA is administered by the Canadian Human Rights Commission (CHRC) which operates independently of the government (in fact, it reports to Parliament) and has powers of investigation, adjudication and enforcement for human rights complaints. Any individual under its jurisdiction, including members of the CF, has the right to lodge a complaint with the CHRC. If determined to be valid, the complaint is investigated and there is a conciliation process that takes place between the CHRC and the respondent (which can be a person or an organization). If conciliation fails, the case is heard by a tribunal.

With respect to any institution, if a tribunal determines discrimination, it can declare a policy null and void, order that a practice be stopped, order costs, compensation and damages to be paid, and have a person hired, rehired, etc. It can also levy fines against persons interfering with the filing of a complaint or appeal. A tribunal decision can be appealed to a Federal Court, but only on legal questions rather than on the soundness of a decision. The CHRC, in general, and human rights tribunals, in particular, have a great deal of power which they vigorously wield. For example, the CHRC often plays an advocacy role in publicizing discriminatory practices that it perceives and otherwise prosecutes precedent-setting cases. Service to complainants is provided free of charge, and this includes lawyers for tribunals and appeals.

Exclusions under the CHRA are made on the basis of demonstrated bona fide requirements, with the burden of proof resting on the organization or institution involved in the discriminatory practice. Thus, for example, previous restrictions on the employment of servicewomen were identified as discriminatory, and the CF had to justify why this was the case before a human rights tribunal. Despite the best scientific evidence and professional opinion that could be mustered, the CF were unable to convince the tribunal that restrictions should remain and, in February 1989, the CF were ordered to integrate women into all roles and environments, except submarines (Pinch, 1991b).

The Charter of Rights and Freedoms (Charter) is part of the Constitution Act of 1981 (Government of Canada, 1987). Section 15 of the Charter, which came into effect in April 1985, goes well beyond the CHRA in guaranteeing individual equality before and under the law, and equal protection and benefit under the law. Provisions for fostering programmes and activities (eg., affirmative action) to ameliorate "conditions of disadvantaged groups" are also contained in the Charter, along with sections dealing with democratic rights, mobility rights, legal rights, official language and educational rights.

As the supreme law of the land, the Charter invalidates all laws that are inconsistent with its provisions. Virtually every provision in the Charter has the potential to impact on the CF, to a greater or lesser degree, both with respect to the proscribed areas of discrimination set out in the CHRA, and others, both listed and unlisted in the Charter itself (Government of Canada, 1985).

As with the CHRA, the Charter does provide for limits and exceptions on the rights it contains; however, these must be reasonable in a free and democratic society, prescribed by law and demonstrably justifiable. Again, the burden of proof is placed on the institution or organization seeking the exemption or exclusion. Also, whereas the CHRC hears CHRA complaints, those under the Charter are processed

through the Federal Court of Canada. While the complainant may have to bear legal costs for the Charter cases, there was, for the first several years, a "court challenge program" that paid for cases of social significance.

The majority of the provisions of both the CHRA and the Charter were based on master trends in Canadian society. This was expressly recognized in a formal discussion paper on the Charter, issued by the Department of Justice (Government of Canada, 1985).

While laws and policies expressed by governments may influence the norms of society by imposing constraints, they do not create norms. Law usually flows from norms, not the contrary.

Thus, an argument for exclusion from the provisions of the CHRA or the Charter is seen as an argument that runs contrary to Canadian social norms. In this regard, while the Canadian military's response to the legislation has been characterized by philosophical adherence to an operational imperatives model of military service (i.e., by initially resisting change), it has pragmatically accepted, and actively implemented, change toward the social imperatives model. This situation has resulted primarily from the CF's inability to provide bona fide justifications for exclusions, as adjudicated by human rights tribunals and the courts.

Three points may be made from the foregoing, based on Canadian experience. First, it generally has not been sufficient for the military to argue that it is a unique institution, with unique requirements, when it comes to restricting individual or equality rights guaranteed under the CHRA or the Charter. Evidence for exemptions must be clearly and unambiguously related to performance outcomes. Second, the view that only military professionals can fully and accurately apprehend the consequences of internal policy change on the military has not necessarily been accepted by tribunals or the courts; this is in contrast to courts in the U.S. which, in some cases at least,

have shown deference to the military on issues concerning cohesion, morale and discipline (Noone, 1989). Third, and relatedly, arguments of "customer preference" or "convenience" for exclusionary practices tend to carry little weight in human and equality rights judgments. Thus, non-acceptance of specific social categories (e.g., women and homosexuals), by a significant minority or even a majority of service members, is unlikely to be taken as justification for their exclusion from military employment, under the provisions of the CHRA and/or the Charter. These are important considerations in the analysis of policy change respecting sexual orientation.

DOCUMENTARY ANALYSIS

This section reviews the policy, research and other documentation that serve as indicators of change in sexual orientation policy in the CF over a relatively short period. This analysis seeks to highlight the connecting threads and to convey the factors that have influenced the progress of change. It will be shown that unrelenting external pressure on the military--from human and charter rights legislation, from Parliamentary bodies and, laterally, from the legal complaints process--led to changes in policy and practice and, ultimately, to the cancellation of the exclusionary policy.

The examination below reveals that unambiguous social and behavioral science data and other convincing evidence to support the status quo could not be produced. This reduced the military's ability to mount an effective legal defence against specific complaints of former service members placed before the Court, and, more generally, evidence was insufficient to justify exclusion of known homosexuals as "a reasonable limit in a free and democratic society" under the provisions of the Charter.

Background: Homosexuality in the Canadian Military. Consistent with changes in the society and the law, and reflected in policy, views and definitions of what homosexuality and homosexuals represent have evolved in the Canadian military over the past three decades. Before integration and unification, regulations differed

somewhat across the separate services in both the labelling of homosexuality or homosexual acts and in the procedures to be followed in "disposal" of cases brought to the attention of military authorities -- that each service member had a duty to report.

The Navy regulations referred to "unnatural offenses" and "homosexuality generally," the Army to "sexual offenses" / "abnormal sexual tendencies" and the Air Force to "homosexuality and gross indecency". Regulations tended to reflect a strong moral aversion to homosexuals. In fact, naval authorities viewed homosexuality as an "evil" and an abomination to be stamped out, and directed "attention of all concerned to the dangers -- spiritual, moral and physical -- of unnatural practices and of condoning these practices in others" (Department of National Defence, 1962).

Specific commonalities across all three services were: the requirement for action by the commanding officer (CO) regarding suspected or known homosexuals or homosexual acts; investigation by military security officials or military police; a medical examination; the possibility of civil action under the Criminal Code of Canada or court martial; and release of those whom investigation identified as homosexual or otherwise "sexually deviant".

Investigations of homosexuals or alleged deviant acts were to be conducted with care; and cautions were built into each of the regulations lest misidentification occur, causing embarrassment or damage to the character of the service member involved, as well as to the public image of the service. Review by higher headquarters formed part of the safeguards in all procedures and the individual was to be released as being "unsuitable for further service" (i.e., an honorable discharge), unless he or she had been convicted of a serious offence in civil court or by court martial, when release for misconduct was to be seriously considered (Department of National Defence, 1961; 1962; 1964).

Homosexuals were classified as "sexual deviants," and were considered a threat to good order, discipline and security; hence they were either to be prohibited from

entering the armed forces, in the first instance, or, if they managed to enroll undetected, were to be released upon being identified. This view of the homosexual as deviant persisted when regulations were amalgamated into one Canadian Forces Administrative Order (CFAO) 19-20, Sexual Deviation -- Investigation, Medical Examination and Disposal, following unification of the three services.

As part of the reform of the Canadian criminal justice system in 1967, sexual relations between consenting adults ceased to be a criminal offence (Zuliani, 1986); thus there was no basis in civil law to visit penalties upon known or suspected homosexuals, unless specific offenses had been committed. But under the CF regulations, it was still the duty of all service members to report suspected or known homosexuals and the duty of the CO to have each reported case investigated. In fact, the process for "disposal" of homosexual cases remained virtually unchanged until the mid-1970s. However, the vast majority of homosexual releases from the CF were of the administrative type and not the result of disciplinary or criminal proceedings.

In 1976, CFAO 19-20 was amended and retitled "Homosexuality - Sexual Abnormality Investigation, Medical Examination and Disposal". Whereas homosexuality and sexual abnormality had been previously lumped together, they now received separate definition: that is, a "homosexual is one who has a sexual propensity for person's of one's own sex"; and "sexual abnormality is any form of sexual behaviour not conforming with accepted moral standards or constituting an offence under the Criminal Code of Canada, e.g., voyeurism, exhibitionism, gross indecency, bestiality".

The requirement of persons subject to the Code of Service Discipline to report suspected or known homosexuals and sexual abnormals to their CO remained; also , whereas previously, service women could only be questioned in the presence of a women officer, a women non-commissioned officer was now considered acceptable if the former was not available. While this represented a degree of "fine-tuning", the impact for homosexuals remained the same; they would be reported, investigated and,

if confirmed, compulsorily (but usually honorably) released from the CF. Theoretically, at least, this was the case even if a member was a "passive homosexual" or if it was established that propensity for one's own sex existed.

Impetus for Change: Charter-Related Influences. The impetus for change in the policy came with the promulgation of the CHRA and the Charter, as earlier indicated. The latter gave rise to a review of all laws and regulations governing institutions within Federal jurisdiction -- including the military. Moreover, the Canadian Human Rights Commission (CHRC) began almost immediately to advocate for inclusion of sexual orientation as part of the prohibited grounds in the CHRA. This pressure has remained up to the present time, and likely has had an indirect bearing on the policy change recently implemented in the CF.

Government Action. The first phase of the review of the equality rights provisions of the Charter (Section 15) was released by the Canadian Justice Department in January, 1985, as Equality Issues in Federal Law: A Discussion Paper (Section 15 became effective 17 April 1985). The paper only highlighted those areas that appeared not to conform to the Charter but made clear that follow-up action on offending statutes and regulations was to be conscientiously reviewed. It offered three simple suggestions as to what constituted discrimination under the Charter (1985): first, "when unnecessary distinctions are made for irrelevant and capricious reasons"; second, distinctions for "unnecessary reasons that are not relevant in the circumstances"; and, third, "when neutral administration and laws have the effect of disadvantaging people already in need of protection under Section 15". In commenting on areas of possible non-conformity, the CF were singled out for attention in five areas: mandatory retirement ages; physical and medical employment standards; the recognition of common law relationships; the employment of women; and, sexual orientation.

These areas formed part of the hearings and discussions of a Parliamentary Committee on Equality Rights, established in February 1985. In its report, the Committee (1985) recommended, among other things, that the Royal Canadian Mounted Police (RCMP) and the CF "bring their employment practices into conformity with the (CHRA) as amended to prohibit discrimination on the bases of sexual orientation". The Committee noted that it was not convinced by reasons advanced by the RCMP or the CF during its deliberations for continuing discrimination against homosexuals, which were that members:

frequently serve in isolated posts in close physical proximity ... train and often live in confined quarters; homosexual members may be subject to blackmail; some countries to which members may be posted make homosexual relations illegal; the presence of homosexual members undermines morale and confidence; and homosexual members are excluded for their own protection.

In particular, the Committee held that the arguments were based on stereotypical views of homosexuals, that undue weight was given to the sensitivities of others, that risk of blackmail stemmed from current exclusionary policies, and that, further, heterosexuals are as vulnerable to blackmail as are homosexuals. If the RCMP and the CF could not persuade a human rights tribunal that their policy was based on a bona fide occupational requirement, it was to be changed.

A further report, entitled Toward Equality, was published by the Justice Department in 1986, as a response to the Parliamentary Committee's recommendations. It supported most of the recommendations made by the Committee, including the recommendation that the CHRA be amended to include sexual orientation as a prohibited ground of discrimination and stated the Governments' view was "that one's sexual orientation is irrelevant to whether one can perform a job..." (1986). Even though the Government affirmed its interest in the "requirement of the Armed Forces to be operationally effective in the interest of

national security", the CF's position in barring known homosexuals from service was substantially undermined, and the CF were put in a position of formally defending the exclusionary policy.

Department of National Defence (DND)/CF Response. In response to the CHRA, the Charter and the three documents just reviewed, a Charter Task Force (CTF) was established "to examine and make recommendations on courses of action available to the CF in pursuit of the Governments' objectives set out in Toward Equality" (Department of National Defence, 1986). One of the five issues examined was sexual orientation.

For our purposes, the CTF study should be considered as part of "phase one" of a policy review that began in 1985 and did not formally end until the ban was lifted in 1992. During the CTF's study, which lasted some six months, both the Associate Minister of National Defence (AMND) and the Chief of the Defence Staff (CDS) appeared before the (Parliamentary) Standing Committee on National Defence and the Standing Committee on Equality Rights, respectively. In April 1986, the AMND was asked to assure the Committee that action to release militarily qualified homosexuals would not be taken during the CTF's examination of the sexual orientation issue. The AMND stated that it would be behaviour and not just the fact of a CF member being a homosexual, that would lead to dismissal. Inappropriate behaviour of the individual, regardless of sexual orientation, could lead to release. But the simple assertion by an informant that an individual was a homosexual would not be adequate reason to take release action. Although this response questioned the "propensity clause" and the policy of the CO acting on the simple identification of a CF members as homosexual, the CFAO 19-20 remained unamended.

When the CDS was queried by the Committee in June 1986, as to the status of CFAO 19-20, he responded that it had not been changed, but that given the new position indicated by the government, homosexuals would not be released from the

CF "strictly and simply because they might be labelled homosexuals". Also, cases would not be disposed of without the personal sanction of the Assistant-Deputy Minister (Personnel) or himself.

These statements and others made by the Minister of National Defence, without any modification to CFAO 19-20, created incongruence between stated policy and the appropriate course of action to be taken at the unit level. For example, there is no evidence that "appropriate" versus "inappropriate" homosexual behaviour were defined, and CF members who were confirmed to be homosexual continued to be released. Although the exact numbers and the circumstances in each case are not known for this period of policy ambiguity, 60 identified or self-admitted homosexuals left the CF between 1986 and 1992 (DND, 1993). Policy remained in this state of uncertainty during and beyond the life of the CTF study, a brief summary of which is given below.

The Charter Task Force (CTF). In approaching the study of sexual orientation, the CTF undertook to assess "the probability of adverse effect" on national security of removing the barriers to homosexual enrollment and retention, and it limited its examination to homosexuality as it referred to male homosexuals and lesbians (1986, p. 3). While acknowledging that homosexuals had completed successful careers and that they were "capable of performing the duties of all members" (*op. cit.*), the CTF Final Report emphasized that assessment was being made "of the potential impact of the presence of known (my emphasis) homosexuals on operational effectiveness in the CF, particularly in war" (*op. cit.*). The data sources were recent experiences with the presence of known homosexuals in the CF, attitudinal surveys of the public and serving members, and the policies of other nations. Arguments were made under the general headings of: social environment; cohesion and morale; confidence in the CF; discipline; privacy and equality; recruiting and retention; policies of other nations; and medical implications. They are briefly summarized below.

Social Environment. The CTF noted there were "substantial reservations" in acceptance of homosexuals among Canadians and citizens of the Western world; that negative attitudes were deeply rooted, difficult to change, and could lead to violence against homosexuals. The public was "uneasy" regarding employment of homosexuals in the CF, with men being divided in their opinion and a majority of women (59%) being in favour. Sizable minorities of both genders indicated homosexuals would decrease CF effectiveness.

Cohesion and Morale. The CTF cited survey results which indicated that most CF members opposed the idea of working with homosexuals in high stress-low privacy conditions. Underlying causes were heterosexuals' anxiety and discomfort over the prospect of direct or indirect personal contact with homosexuals: said to be influenced by media reports and previous experience with homosexuals. Further, it was argued that subordinate reactions to known homosexual leaders would result in diminished respect and confidence, and homosexual leaders would be unable to elicit the obedience from subordinates that is required in the CF. This was supported by stated intentions of CF survey respondents; 45% of CF males and 20% of CF females would refuse to be supervised by a homosexual of the same gender. According to the CTF, mutual acceptance and respect are lost when homosexuality is discovered, and this leads to a breakdown in cohesion, social isolation of the homosexual and even to harassment and assault.

Confidence in the CF. The CTF argued that employment of homosexuals in the armed services would reduce confidence in the CF among heterosexual members. Drawing on CF survey results, which indicated that 80% of males and 47% of females surveyed predicted a decrease in the effectiveness of the CF, the CTF thus expected loss of confidence in the CF and adverse impact on morale. Bonding and team spirit would be impaired by the presence of homosexuals, causing a breakdown in cohesion, especially in operational units. Statements from the U.S. Court and from

U.S. sociologists that homosexuals would not comply with group mores or conform to "the dominant orientation" of the military were used to buttress these conclusions.

Discipline. The CTF observed that discipline plays a central role in an effective military force. Subordinates must respond to orders from their supervisors, but there is a fear that homosexual supervisors would use their power for sexual ends. Not only would subordinates react unfavourably toward a homosexual authority, and there is a strongly expressed view that homosexuals would be verbally and physically harassed, especially in the army and the navy.

The above views were considered reinforced by data on sexual assault in the CF. From 1981 to 1984, homosexuals were alleged to have been responsible for 41 incidents compared to heterosexuals' responsibility for 197, or about four times as many incidents as were heterosexuals. A review of homosexual incidents from 1966 to 1986 involved cases of abuse of rank and authority, preferential treatment of other homosexuals, and imposition of their practices on others by force, threats, bribery, favours and persuasion. Overall, employment of known homosexuals was predicted to erode standards of discipline in the CF.

Privacy and Equality. Unlike conditions in other occupations, the CTF pointed out that CF members live and work in very close contact with one another. For example, they share common latrine and shower facilities and these might stimulate sexual advances by homosexuals toward heterosexual members. The latter do not object to unavoidable, close physical proximity and contact with other heterosexuals but they are repulsed by the possibility of stimulating a same-sex homosexual. This is supported by CF survey results which indicate 62% of males and 41% of females would refuse to share showers and sleeping accommodations with homosexuals of the same gender. To force such a condition would violate equality rights that have been accorded to heterosexual men and women; the alternative of providing four

separate sets of accommodation and hygiene facilities (especially in the navy) might be possible, but not practical.

Recruiting and Retention. Although accepting homosexuals could potentially broaden the recruitment and selection pool, the CTF concluded this would be more than offset by a reduction in attractiveness of the CF for heterosexuals, and decreased support by CF members, friends and relatives of potential candidates--major sources of influence for CF participation (c.f., James, 1981). This is borne out by responses of 1,200 recent enrollees, of whom 38% of men and 26% of women stated that the enrollment of known homosexuals would have been an important consideration in their decision to join the CF (Zuliani, 1986).

Policies of Other Nations. The CTF Final Report noted that most Western nations have some restrictions on homosexuals. The United Kingdom (U.K.), the U.S., New Zealand and Australia (since revoked) have total exclusionary policies, while only Norway and the Netherlands have no limitations on homosexual employment. This was offered as additional support for the maintenance of the status quo.

Medical Implications. Homosexuals were argued to be greater risks for sexually transmitted diseases (STDs); therefore such diseases as Hepatitis B and AIDS were predicted to increase. Problems would be encountered with blood transfusions on the battlefield. Screening costs for detection of diseases and ensuring uncontaminated blood would be extremely high, as would be the cost of treatment and care with the expected increase of STDs. However, apart from increased costs, there was no compelling medical reason why an open policy toward recruiting homosexuals could not be effected.

Conclusions. Overall, the CTF concluded that there was widespread unacceptance and negativism towards homosexuality in Canadian society and in the CF, that homosexuals were themselves averse to their sexual orientation becoming

known, and there existed policies of exclusion of known homosexuals among all nations with voluntary military systems—including in the U.K. and the U.S., nations most culturally similar to Canada. The presence of known homosexuals was assessed as being detrimental to cohesion, morale, discipline, leadership, recruiting, medical fitness, privacy rights of members and, ultimately, to operational effectiveness. Thus continuation of the policy of not employing known homosexuals was recommended.

Observations on the CTF Final Report. The CTF Final Report, put forward to the Canadian Government as the CF and DND position on sexual orientation in October 1986, represented interpretation of the data used for a position that seemed widely and strongly held within the CF (*c.f.* Zuliani, 1986). As such, it reflected an operational imperatives viewpoint. Much of the empirical data were taken from a research study especially commissioned for that purpose (Zuliani, 1986), which will be reviewed presently. However, it is important to note some of the relevant issues that the CTF Report omitted.

First, there was no attempt to take account of the direction of the trend toward greater acceptance of homosexuality in Canadian society, which Zuliani (1986, p. 3-5) had noted in his report. For example, polling data show that the vast majority of Canadians felt that discrimination on the basis of sexual orientation should be illegal, a majority wanted to see protection for homosexuals in employment and access to services embedded in the CHRA, and a majority agreed that homosexuals should be employed in the CF. In this regard, the CTF's use of statistics was somewhat selective and interpreted to support the exclusionary policy.

Second, there was no attempt to identify responses based on myths, stereotypes and prejudices regarding homosexuals and no discussion of possible methods (e.g., education, leadership influence, heterosexual-homosexual contact, etc.) to overcome them (Kristiansen, 1989; Shawver, 1991a,b,c). In this respect, the CTF

failed to meet one of the major objections of the Parliamentary Committee, noted above.

Third, an undifferentiated view of the CF environment permeates the CTF Report, suggesting that the preponderance of personnel are deployed in operational roles when, in fact, these account for no more than one-third of all military personnel (Cotton et. al., 1978). In attempting to develop an operational imperatives argument for exclusion, the CTF virtually ignored almost 70% of the CF environment where negative consequences of homosexual employment (e.g., on readiness) would be predictably few and manageable. Relatedly, there is no analysis of the efficacy of management strategies from other nations' militaries employing homosexuals, and how they might have been translated to the CF.

Fourth, there is no assessment of the exclusionary policy as a possible causal factor in disciplinary problems created by homosexuals, and the reported incidence of homosexual assault in relation to heterosexual assault was based on inadequate and unreliable investigation methods. In fact, the incident rate for the periods reported remains unknown (DND, 1993).

Fifth, the CTF Report relies heavily on the expressed dislikes and preferences of service member responses on a survey, and offers largely "customer preference" arguments that carry little weight under the CHRA and the Charter. This plays against the aforementioned criticism of the Parliamentary Committee that undue weight is given to the sensitivities of members and insufficient concern for those who are excluded from military service.

RESEARCH RELATED TO CTF STUDY ISSUES

Since the CTF study raised virtually all the issues considered relevant to the employment of homosexuals, this section reviews research and research-based

commentary related to those issues (even though only one of the documents was completed within the life of the CTF). Once this has been done we shall return to policy and other issues.

The Zuliani Study. As noted, the most current and systematic data used by the CTF were generated by an attitude survey of 6,580 CF members, conducted by Zuliani (1986). Land, sea and air operations units were proportionately represented, and women, francophones, operational units, and basic trainees (both officer and non-commissioned) were over-represented, while males, anglophones, support and isolated units were under-represented. The sample was drawn during a period of block leave and this may have affected the representativeness of the sample (Zuliani, 1986).

Respondents were administered an anonymous, 10-part Attitudes Toward Employment of Homosexuals (ATEH) survey, which elicited information on the basis of scaled items, as well as open-ended comment. It attempted to assess the attitudes of CF members toward homosexuals in general, and the potential impact of policy change in areas such as: heterosexuals and homosexuals living and working together; confidence in the effectiveness of CF; and recruiting. It also sought to identify "determinants of the reactions and attitude of homosexuals toward homosexuals", and to arrive at an estimate of the number of homosexuals in the CF (found to be less than 2% "exclusively homosexual" and less than 1.5% "non-exclusively homosexual", based on self-reporting).

In summarizing his study results, Zuliani (1986) concluded that there existed among CF members a good deal of negativism toward homosexuals being openly permitted to serve in the CF. For example, with respect to cohesion and morale, he noted that heterosexual CF members expressed concerns with privacy: "many would refuse to undress, share shower facilities or sleeping accommodation with known homosexuals". Heterosexual males--particularly those in the land and sea operations

groups -- would be unwilling to work with openly homosexual men, with many heterosexual men indicating they would refuse to be supervised by male homosexuals (women were somewhat less negative, with only small percentages indicating they would refuse to be supervised by homosexuals).

Zuliani further concluded that homosexuals would be subjected to harassment and physical violence; that CF members were concerned with contracting disease from homosexuals, and "many would refuse blood transfusions from known homosexuals for fear of contracting AIDS;" and, that CF members generally agreed that operational effectiveness and the CF image would be reduced by the employment of homosexuals. These results were interpreted to predict adverse effects on team spirit, bonding, confidence in leadership and CF image, impairments to cohesion and morale (leading to personnel problems), and an overall threat to military effectiveness.

On the face of it, Zuliani's report appears to offer clear-cut evidence for the continuing ban on homosexuals in the CF; indeed, as summarized above, this was the thrust of the CTF Report. However, there exist a number of deficiencies which call the results and their interpretation into question; these were pointed out by three external reviewers (Kristiansen, 1989; Henderson, 1990; Suedfeld, 1991).

The Kristiansen Review. Kristiansen (1989), whose review is the most comprehensive, detailed, and critical, makes observations in areas of theoretical rationale, methodology, data analysis, the presentation and interpretation, and inferences (my emphasis) drawn from the results. Overall, she finds the Zuliani report extremely deficient.

As to theoretical rationale, Kristiansen (1989) raises four criticisms of Zuliani's report: (1) "the causal impact of demographic characteristics such as age and sex was overstated;" (2) "the explanation of gender differences in attitudes toward homosexuals was simplistic and uninformative;" (3) "the discussion of the theory of

reasoned action was inaccurate;" (4) "the motivational basis for (male) service members attitudes and likely role of social norms was not discussed;" and, (5) "attitudes toward homosexuality may be irrelevant in the military context (and) may have little effect on overt behaviour of service members".

The first criticism speaks to the logic of causal inference, which, of course, should not be made on the basis of correlational or associational data. Henderson (1990) makes a similar observation and refers to "the failure to acknowledge great leaps of inference and overstatement of conclusions". The second criticism is based on competing theoretical explanations of male-female differences in attitude formation regarding homosexuals. This would have been relevant if an attitude change strategy was being developed, but was not crucial in Zuliani's study. However, criticisms (3) and (4), above, are important since the conditions under which behaviour may be predicted were not specified and the role of social norms--which are central to both attitudes and overt behaviours of CF members--was ignored. For example, the prevailing norm of non-acceptance of homosexuals would be expected to produce at least a proportion of the negative intentions observed in Zuliani's study; by the same token, a norm of acceptance would, conceivably, produce a more positive effect. Finally, Kristiansen's suggestion that attitudes of CF members are irrelevant must be qualified; the influence of socialization, training, regulations and supervision on CF members is by no means absolute, and expressed views that run counter to military teaching and direction may indeed be disruptive. The issue is not that attitudes have no relevance, but that the effects of other moderating influences must be taken into account if meaningful interpretations are to be made.

On the methods side, Kristiansen (1989) notes that: (1) "the construct validity of the measure of attitudes toward homosexuals is unknown;" (2) "the validity of the measures of personal and organizational outcomes is suspect owing to the potential misunderstanding, of these items;" (3) "the timing of the survey may have affected service members' response;" and, (4) "justification for excluding the responses of non-

exclusively heterosexuals from the analysis is not convincing". Again, some of these criticisms are more important than others. For example, regarding (1), given the lack of validity data, a confirmatory factor analysis would have been most appropriate, to ensure that the factors conceptually indicated did, in fact, exist. As regards (2), Zuliani indicated that there appeared to be some misunderstanding of the term "heterosexual," and many of the items lacked specificity as to action, context and time, not to mention the fact that a number called for CF members to make predictions regarding organizational outcomes (e.g., on operational effectiveness, recruitment, etc.) that even the most knowledgeable would be hard-pressed to assess accurately. Criticism regarding (3) is justified in that the "AIDS scare" was not only prevalent during the survey period but redolent with misinformation and hysteria; and regarding (4), in the interest of providing a complete picture of CF members' reactions to homosexuals, the "non-exclusively heterosexual" category of respondents should have been included. This is a rather weak objection given that the major concern was with the reaction of heterosexuals.

Kristiansen (1989) raises numerous technical observations on the validity of the data analysis and results, that call the report into question; however, only those considered to be of major import are highlighted as follows: (1) the regression analyses were performed incorrectly and, therefore, "valid conclusions cannot be based on them;" and (2) "the presentation and interpretation of many of the findings appear to be biased and designed to present homosexuals in the most unfavourable light". The point at (1) appears justified, since the manner in which variables are entered in a regression equation can indeed affect the results and the conclusions drawn from them. As to point (2), there are several examples (e.g., contact with homosexuals, harassment expectations), where the results do not permit clear-cut negative depictions and, indeed, the convention in this type of study is to link neutral and positive responses. Also, the fact that Zuliani had omitted a large body of literature which would have debunked some of the negative views regarding homosexuals (c.f., Shawver, 1991 a,b,c, below) and his tendency toward "great leaps

of inference" (Henderson, 1990) suggests, at a minimum, some degree of bias in his report.

In addition to these technical observations, Kristiansen (1989) further noted that the most uncontroversial findings of the survey suggest that "service members are misinformed about homosexual issues". There is no question that CF members are generally misinformed regarding homosexuals; given that this is amenable to change through education, it should have figured into Zuliani's report and, in turn, been translated into the CTF Final Report. In criticizing Zuliani's research, Kristiansen (1989: 36) points to the "value justification affect", which argues that people and organizations will justify their attitudes by appealing to "universally held positive values". She suggests that in trying to perpetuate an exclusionary policy, the CF are pursuing their mission of national security as an end in itself, rather than national security's underlying purpose which is to defend and maintain "a democracy rooted in values of freedom and equality for all, including homosexuals". This is the social imperatives argument that the military should embody the values that it is mandated to protect and defend.

The Henderson Review. As previously indicated, Henderson (1990) finds significant weaknesses in Zuliani's methodology and conclusions, including the tendency to draw unqualified conclusions and inferences of his results. For example, that unrestricted homosexual employment will lead to erosion of cohesion and morale and pose a serious threat to military effectiveness are, according to Henderson, unwarranted inferences, based on the method of inquiry used and results obtained. However, unlike Kristiansen, who assesses Zuliani's survey as lacking research value, Henderson (1990) believes that its results are useful if placed within the context of a cohesion-combat performance impact model.

In his review, Henderson (1990) argues that survey results show open homosexual employment will impact negatively on "primary groups", "horizontal

cohesion" and "vertical bonding". In all areas, the arguments and conclusions he advances are similar to those of the CTF Report, the difference being that they flow from a more tightly conceptualized rationale of the importance of the primary group, leader-follower cohesion and peer bonding to unit effectiveness.

To Henderson (1990, p. 6-8), the degree and intensity of negativism--expressed in the survey by male soldiers toward homosexuals in general and as they specifically relate to issues of sharing facilities and privacy--indicate the "potential for major cleavages within the (CF) should homosexuals be enrolled and retained". Value differences between homosexuals and heterosexuals would impede development and sustainment of high performance combat units. Tensions arising over privacy needs would lead to disruption and militate against teamwork, achievement of high standards and survival/success on the battlefield. As Henderson himself suggests, research-based examples are hard to come by, and he provides none.

The major argument advanced by Henderson (1990) with respect to horizontal or peer cohesion is the need for an integrative value basis to foster "buddy relations" which, in turn, sustain the individual soldier in the face of conditions of danger, isolation and loneliness of the type encountered in listening post and similar missions. "Such situations demand complete trust, confidence, and sharing of basic values if soldiers are to develop and maintain the necessary teamwork and soldierly skills" (p.9). The conflicting values observed in the Zuliani survey would be detrimental to peer cohesion, as would be rumours, the threat to manliness, toughness, etc., attendant upon the inclusion of known homosexuals.

Other examples of threat to horizontal cohesion, as depicted in survey results, revolve around the unacceptance of blood transfusions from homosexuals to heterosexuals, owing to fear of AIDS, etc., and the additional conflict created by "refusals". This, according to Henderson, would erode confidence in the medical system and adversely impact on unit effectiveness.

Regarding vertical bonding, which refers to cohesion up and down the leadership chain, Henderson sees homosexual participation as a barrier to leaders building the essential "enduring primary and personal relationship with their soldiers" (p.12). There should be agreement upon norms between the soldier and the leader and these should be congruent with military objectives--which lead to common values for guidance of "soldiers' day to day behaviour". The presence of homosexuals would pose obstacles in sustaining the leadership/followership process.

Sources of leadership influence are "expert power" (based on real or imputed expertise), "reward/coercive power" (power to reward or punish), "legitimate power" (power based on acquired cultural values), and, "referent power" (power based on personal identification). In Henderson's view, all four sources of influence need to be used "to the fullest" under combat or wartime conditions, and would be adversely effected by the inclusion of known homosexuals. But he is most concerned with the loss of legitimate and referent power (the two most potent influences) that he believes the antipathy expressed toward homosexuals by survey respondents would bring. The presence of homosexuals in leadership positions or the association of leaders implementing homosexual inclusion policies would lead to loss of legitimacy for those in authority and for the military, at the same time that it would erode the close personal relationship, identification, respect and trust of the follower for the leader. Full development of leadership capabilities would be prevented and leader influence would be curtailed.

Finally, Henderson (1990) notes that personal privacy of heterosexuals from the gaze of same-sex homosexuals could not be guaranteed, and to segregate on the basis of sexual orientation would be impractical.

Overall, Henderson's view is: given the strength of negative response in the survey, the CF has the option of choosing either maintenance of combat effectiveness or equal opportunity for homosexuals. Henderson's review is consistent with the

general thrust of the CTF Final Report, but it lacks demonstrable proofs of the negative impact on cohesion by the presence of homosexuals. He also tends to fall into the same trap as Zuliani--assuming that stated intentions and future behaviour are virtually identical. Henderson assumes, as well, that social values, norms and attitudes are static when, in fact, they are subject to change over time and conditions--and may be accelerated through socialization, training and education [see, e.g., Kristiansen (1989), above, and Shawver (1991, below)]. His analysis is also based on an all-male unit scenario, which is not the direction of change in the CF and a number of other militaries. It may be noted that many of the same predictions were made for increased women's participation but they have not been borne out by experience, at least as far as negative impact on operational effectiveness is concerned.

The Suedfeld Review. In his review, Suedfeld (1991b) points up a number of problems with Zuliani's survey, including a sampling bias, that he argues could produce erroneous results. For example, bias was introduced by over-sampling women, who tend to be more tolerant of homosexuals [note, however, that Zuliani (1986) conducted a separate analysis for women, for which he was criticized by Kristiansen (1989)]. Over-sampling of francophones and recruits/officer candidates and under-sampling of support/isolated locations could have produced unknown distortions. In Suedfeld's (p. 2-3) view, high stress locations, such as isolated posts, hazardous situations, peacekeeping missions, etc., should be over-sampled and intensely studied, since negative reactions and acute conflict are most likely to emerge in these settings. Given the fact that many CF members surveyed would have served in such environments makes this a rather weak criticism.

Suedfeld (p.3-6) makes a series of comments on "research artifacts" (factors that confound results and interpretation). Unlike Kristiansen and Henderson, he considers that the "ecological validity" (i.e., the survey resembled non-experimental, everyday life) to be desirable and "in some ways extremely high". Also, he notes that, despite the assurances given by test administrators--CF Personnel Selection Officers--

"expectancy" probably influenced the results of the survey, since it was administered by and for the CF. In particular, serving homosexuals might have been reluctant to admit their sexual orientation. While Suedfeld finds "test validity" and "question phrasing" largely satisfactory, he believes that the definitions of heterosexual and homosexual were inadequate, and that there was ambiguity in scoring the ATEH scale.

Despite these observations, Suedfeld tends to take the findings in the report at face value. However, his analysis of the scale responses of the ATEH indicate to him that CF heterosexuals are not "merely homophobic", but that many react to the possibility of homosexual enrolment with "anger and disgust" (p.8).

Overall, Suedfeld agrees with the import of the study as expressed in Zuliani's report; in fact, he states that the magnitude of negative reactions were probably underestimated (p.9). Similar to Henderson, he agrees that "invasion of privacy" by homosexuals, particularly under conditions of stress, danger, discomfort and already tension-laden privacy conditions, is a serious concern. However, he stops short of making dire predictions regarding degradation of operational or military effectiveness should the policy be changed. The implication to be drawn from Suedfeld's review is that we might expect the integration of known homosexuals to be fraught with difficulty, but that does not necessarily mean that problems would be unresolvable or that the resulting situation would be unmanageable. Again, the ideas provided by Suedfeld are interesting but the evidence regarding exclusion or employment of known homosexuals is inconclusive.

The Internal UDG Study. In 1990, Urban Dimensions Group, Inc. (UDG), was contracted to replicate the Zuliani study: both to overcome some of the weaknesses noted and to determine if attitudes of CF members had changed. Virtually all the issues covered in the earlier survey were included in the UDG study (called the Canadian Forces Internal Survey on Homosexual Issues), as well as additional

information to permit analysis of factors related to acceptance/non-acceptance of homosexuals (UDG, 1991, p. 2, Appendix A). The study was completed in June 1991.

Unfortunately, a major error was made in sampling (for which the DND accepted responsibility), which resulted in a restricted and unrepresentative sample. Moreover, the response rate of the sample selected was just over 40% (2,479 out of a possible 5,973)--low for a study conducted within the CF. Over-represented were those who joined the CF in Atlantic Canada, senior officers and non-commissioned members (NCMs), and those with long service; under-represented were those who enrolled outside Atlantic Canada, junior officers and NCMs, and those with five or fewer years of service. The magnitude of the sampling bias and the unacceptably low response rate means the results cannot be generalized to CF members, as a whole, and the use of inferential statistical procedures is inappropriate. However, as cumulative information on the topic, the results are of some interest.

In general, the structure of the responses in the UDG survey were similar to those reported by Zuliani (UDG. p. 23-24). For example, a greater proportion of men than women exhibited hostility toward homosexuals, and men are more hostile toward gay men than they are toward lesbians. Women are relatively less hostile to both male and female homosexuals. As noted, owing to the restriction of the sample, direct comparisons are not meaningful; however, for the respondent group, while significant minorities are negative on a number of important dimensions, overall, the group is relatively tolerant of homosexuals, and particularly so of female homosexuals.

On the negative side, the vast majority of respondents indicated that lifting the prohibition on homosexuals would decrease operational effectiveness, and a majority would have difficulty working alone with homosexuals or sharing toilet facilities with them. Also, about 40% were doubtful that CF policy would protect heterosexuals from being harassed by homosexuals, and 64% were doubtful that homosexuals would be protected from harassment by heterosexuals. A minority of respondents predicted

various other negative effects if homosexuals were openly employed in the CF, including: support for military service would be reduced; there would be less willingness to give and receive first aid; and, there would be difficulties in interaction between heterosexuals and homosexuals.

A number of relationships were reported which suggested the basis for ameliorating negative attitudes (e.g., exposure to positive media messages, religious affiliation, etc.) but, owing to sampling difficulties, they can be taken only as suggestive rather than conclusive.

Review of UDG Study. Since reviews of the UDG report were completed by Henderson (1991) and Suedfeld (1991) before the sampling error was discovered, it would be unproductive to treat them in detail. However, among other deficiencies, Henderson (1991, p. 13-14) commented on the under-representation of lower-ranking CF members, higher educational levels, etc., of the sample as well as on the effect of less direct attitude measures of feelings toward homosexuals. In his view, these produce an under-estimation of negative effects and, therefore, the greater tolerance noted in the UDG report is unwarranted. Henderson's actual analysis of the survey results indicate an adverse impact on all forms of cohesion and short- and long-term unit degradation. Again, the issue of privacy is raised as a particularly vexing problem if known homosexuals are permitted to openly enrol and serve in the CF.

Suedfeld (1991c, p. 1) finds the UDG survey carefully constructed and views focus group interviews, which formed part of the survey methodology, as strong points in the research design. However, he again points to research artifacts that may confound the results and, again, the effect of a more "mature" sample of CF members is noted--i.e., they would be expected to be more tolerant (social desirability). But he also holds out the possibility that CF members may have responded more negatively than they actually were in order to discourage policy change--i.e., attitude questionnaires are poor predictors of actual behaviour, a point made earlier by

Kristiansen and Henderson. After reviewing all the major indicators of the study, Suedfeld (p. 14) makes the observation "that while CF personnel are not universally hostile to homosexuals, the predominant view is negative". He predicts tension and discomfort among the most vulnerable: "persons with less service and lower rank...in ground and naval units", and envisages the possibility of other negative impacts on discipline, retention and recruiting, as well as "skepticism" regarding protection of both homosexuals and heterosexuals from harassing each other. However, "while problems arising from a policy change would not be overwhelming, they would be substantial and serious"; and the degree of disruption of CF members in a given unit "would vary with a number of characteristics".

Overall, owing to its own deficiencies and the inconsistencies in the reviews, the UDG study contributed little valid, systematic knowledge to the database on sexual orientation or the on-going debate.

Other Research-Related Inputs on Specific Issues. As part of the data-gathering process, Suedfeld (1991 a and c) reviewed an article by Cameron, Cameron and Proctor (1989) on various social impacts of homosexuality and provided an analysis of privacy issues. The former is an analysis of data from a U.S. national sample of 4,340 respondents and a group of 842 Dallas, Texas, residents, conducted in 1983-84. Samples were not representative of the civilian population and contained a high proportion of whites, homosexuals and women. On the items that bear a resemblance to those asked in Canadian surveys--eg., privacy violations and military situations--heterosexuals supported discrimination against homosexuals and otherwise were largely negative in their assessments of the impacts (Suedfeld, 1991c). Homosexuals, on the other hand, were against discrimination and positive toward both heterosexual and homosexuals. Military veterans were more negative toward homosexuals than non-veterans. Much information reported by Cameron *et. al.*, which cast homosexuals in a negative light is dated (e.g., 1940s, 1970s).

Suedfeld (1991c, p. 15) concludes from the study that "under conditions of special stress...the problem (of privacy) would most likely become even more grave than usual" and "the enrolment of known homosexuals...would be felt as an invasion of privacy and a source of discomfort (for heterosexuals opposed to homosexuals); homosexuals would have serious problems being accepted; and the Forces would suffer in effectiveness, public esteem, morale and recruiting". This is a fair comment, if the Cameron *et.al.* study is taken at face value; however, it is inappropriate as a generalization to the Canadian case, owing to the nature of the survey design and the samples from which the results were obtained.

Privacy. Privacy issues were of paramount concern in the consideration of policy change respecting homosexuals, as noted in the CTF Final Report and elsewhere. Suedfeld (1991a) offers a very detailed analysis of privacy in social environments in all its conceptual, definitional and practical complexities. Important points that he makes are that the need for privacy varies across cultures, nations, socio-economic statuses, job statuses, genders, etc. For example, Suedfeld notes that women appear to have lower privacy needs than do men. His analysis also shows that "the search for privacy is marked by both individual and societal ambivalence" (p. 16); and that actual privacy needs, and associated problem identification and prescription are somewhat ambiguous. However, Suedfeld indicates that less than "optimal" privacy leads to "privacy stress", which can result from, e.g., high social density or "unwanted touching of others". Privacy stress is likely to be high in isolated environments, such as those found in the military (e.g., submarines, isolated stations) and where social compatibility is important to avoiding conflict and hostility (p. 25-34).

An individual's privacy stress is increased by the inability to control the degree to which others have access to him or her. This can negatively affect adaptability of the individual and the group. It can be reduced by environmental design, selecting only those who will be compatible in a group, or teaching people how to adapt to

minimal privacy. Respected leaders (typically those who are less authoritarian) may also help relieve privacy stress.

Overall, Suedfeld (1991a) provides a great deal of definitional information on privacy as it relates to a range of environmental factors, and adds some useful refinement of the privacy issues surrounding the introduction of known homosexuals into the CF. For example, important points for policy consideration are the degree to which perceptions of social and personal privacy can be influenced by environmental design and the degree to which persons can be taught to operate within and adapt to a variety of privacy conditions. This underscores the fact the preferences regarding personal privacy are subject to both influence and change.

Bodily Modesty, Social Acceptance, Gender Differences. Shawver (1991a,b,c), offers specific research-based knowledge on issues related to bodily modesty, problems resulting from associating with or accepting homosexuals, and the effect of gender differences in tolerance of homosexuals. In the short space available here, it is not possible to provide the detailed treatment of these topics covered by Shawver, and only those points most directly related to the inclusion of known homosexuals in the CF are offered. Shawver points out that, generally speaking, bodily modesty is learned in family upbringing and through one's culture. "Modesty discomfort" is about half that in same-sex situations as that in opposite-sex situations. Modesty is best understood as part of habit formation, which is influenced by trends in fashion (rather than as a rigid attitude or value), and is demonstrably one of the easiest to modify for most people, through normal exposure or education. Even those who suffer from "neurotic modesty discomfort" are normally responsive to simple therapeutic techniques.

Shawver (1991a, p. 13-17) reports that required measures to change attitudes and habits of bodily modesty are available. They involve providing people with relatively non-threatening, embarrassing situations, using desensitization techniques,

providing "modesty screens", permitting personal techniques for hiding one's body parts from view or minimizing viewing, and training people to reduce embarrassment to others by learning not to stare at their bodies.

Shawver (1991a, p. 18) states there is no documented evidence to show that heterosexuals would be embarrassed undressing in front of same-gender homosexuals, although there might be some initial embarrassment which, by and large, could be overcome. Cameron *et. al.*'s (1989) study (see Suedfeld's review, above) cannot be taken as evidence to the contrary owing to their poorly worded questions. According to Shawver (1991a), negative reactions of heterosexuals to living in close contact with homosexuals are based primarily on ignorance and stereotyping, and are subject to influence by education. For the most part, Shawver (p 19-20) cites research which shows that homosexuals have been quite responsive to heterosexual sensibilities and indicates that most would not violate social norms in bodily modesty situations. She concludes, therefore, that discomfort caused by the presence of known homosexuals would likely be minimal for most heterosexuals.

However, Shawver (p. 20) predicts that an unknown number of homophobic persons--those who suffer fear and discomfort based on their own feelings about sexuality--would experience extreme discomfort and difficulty around homosexuals. Their reactions would tend to be those that heightened their masculinity, aggression, etc., which could be disruptive of the group. This, however, would be a minority phenomenon.

In focusing on potential problems in associating with or accepting homosexuals, Shawver (1991b, p. 31), points out that the number of "pure homosexuals" is quite small, but those with some homosexual tendencies or experience is quite large (including "pseudo-heterosexuals", who hide their homosexual tendencies and "bisexuals", who are sexually drawn to both sexes). Thus, heterosexuals interact on a daily basis with many who are "more or less" homosexual persons. Given this

situation, the association of heterosexuals with homosexuals is unlikely to be harmful or to interfere with their psychological or social functioning. Moreover, homosexuals are generally reluctant to reveal their identity to heterosexuals, for fear of rejection, and it is unlikely that many would "announce themselves" even if discriminatory policies were revoked (Shawver, 1991b, p. 33).

As to disruption of groups, those homosexuals who are most likely to be disliked and assaulted are those who do not conform to social norms -- unlikely to be a widespread phenomenon in the military. Research evidence suggests that male bonding is reduced in the presence of an anti-homosexual attitude, since men who are anti-homosexual seem less capable of developing emotional closeness with other men. Nevertheless, extreme heterosexual antipathy toward homosexuals could lead to physical assault of homosexuals, which would create serious group dysfunction (Shawver, 1991b, p. 35-36).

As regards the possibility of attitude change toward homosexuals, tolerance can be taught through education, and if heterosexuals are more accepting of homosexuals, they are likely to be more accepting of other out-groups (Shawver, 1991b, p. 37-38). Since anti-homosexual males tend to be concerned about heightening their heterosexual image, if they become more tolerant they will be more capable of intimacy in general, leading to more meaningful friendships, more social bonding, contentment, etc. More tolerance would not increase homosexual actions among heterosexuals unless tendencies were already there. On the negative side, extreme homophobics, who have fears regarding their sexuality, could experience "homosexual panic", and might need special attention (Shawver, 1991b, p. 34). Overall, however, increased acceptance of homosexuals should strengthen social functioning.

Finally, with respect to gender differences in tolerance toward homosexuality, Shawver (1991c) notes that men are about as tolerant of lesbians as are women, so

the problem is tolerance for male homosexuals, mainly by male heterosexuals. The difference between men's and women's tolerance for homosexuality appears to lie in the differences in role definition and role development between men and women, which begin very early in the child's upbringing, are linked to perceptions of masculinity and femininity and carry over into adult life. The fact that gender differences in tolerance levels of male homosexuality may be based on social learning means they may be subject to influence and change, in a positive direction.

Shawver's (1991 a, b, c) comprehensive, focused analysis provides evidence for the possibility of moving toward more tolerant norms regarding homosexuals in society and in the CF. While she does not offer specific evidence on homosexuals serving in military units, and tends to underestimate the amount of effort required to overcome negative stereotypes and deep-seated beliefs held by heterosexuals, her analysis suggests that many of the problems anticipated in homosexual-heterosexual interaction and association may be greatly over-stated. The indicated potential for positive change via education programs and other means to increase acceptance of homosexuals by heterosexual males and females argues for accommodation and is consistent with an equality rights approach to social change. These research-based perspectives, translated into a legal argument, would be expected to weaken considerably a case for the continuance of a discriminatory policy excluding homosexual enrollment and retention under the terms of the Charter.

Summary: Research-Related Inputs. This summary review of the research-related documents shows that survey data produced by the CF do not provide clear-cut evidence for banning known homosexuals. The flaws in the Zuliani (1986) and UDG surveys themselves are only slightly compensated by the reviews of Henderson and, to an even lesser extent, by those of Suedfeld (1991a,b,c); and they are greatly undermined by the evidence and competing views of Kristiansen (1989) and Shawver (especially 1991a and b). The latter are also more consistent with the context of change, as embodied in equality rights legislation, as well as with the social imperative

model of military service. Overall, then, neither the CTF Report nor the research inputs offer a basis for successful defence of the exclusionary policy. The next section examines the impact of legal pressure on policy transition.

LEGAL IMPETUS FOR POLICY CHANGE

Second Phase Review. The impetus for a "second phase" examination of the supporting documentation of the exclusionary policy on homosexuals was the assumption there would likely be legal challenges and, as noted above, the CTF Final Report rested on shaky underpinnings. The policy review continued, first by a National Defence Headquarters (NDHQ) committee and then (February, 1989) by an NDHQ Office of Primary Interest (OPI). The latter worked in close liaison with the Department of Justice, which represents the DND/CF in CHRA and Charter cases. A re-examination of all the Charter-related documentation indicated a requirement for additional supporting evidence for continuance of the exclusionary policy.

During the review period, it can be assumed that the undertakings agreed to by the CDS during Parliamentary Committee hearings were indeed carried out, and that identified homosexual cases were reviewed and approved either by the CDS or the senior personnel authority, ADM(Per), before release action was taken. Though not confirmed by documentation, given the uncertainty surrounding the final policy, informal actions and decisions were likely taken to accommodate apparent shifts in policy emphasis. The fate of serving homosexuals no doubt created pressure for a formal, definitive direction from NDHQ to CF units.

Interim Policy. The first documented sign of policy change was the issuance of an interim policy on homosexuality in January 1988, when a number of modifications to CFAO 19-20 were introduced. CF members were no longer obliged to report known or suspected homosexuals to their CO and "propensity" ceased to be a reason for compulsory release. Admitted homosexuals were to have the choice of accepting

honourable voluntary release or retention with restrictions. These included: ineligibility for conversion of terms of service, promotion, career development and training (except as required for restricted employment), posting and transfer to the reserves. This did not legitimize "active homosexuality" but "passive homosexuals" could remain in the CF, albeit that their careers were, for all intents and purposes, at a dead end.

The homosexual exclusion policy was further weakened in November 1990, when an external review by the Federal Security Clearance Committee of government-wide security clearance procedures led to the suspension of the CF's Special Investigation Unit's (SIU's) investigation of suspected homosexuals. Reference to the SIU was deleted from CFAO 19-20 and all sexual behavioral issues were to be referred to NDHQ Personnel staffs (DND, 1990; 1992). This action indicates that sexual orientation, in and of itself, was no longer considered relevant to security classification, and that any *a priori* assumption of homosexuals as security risks was removed.

Court Challenge. The on-going policy review was hastened by a statement of claim filed in the Federal Court of Canada, in January 1990, by Michelle Douglas, a former Lieutenant in the CF, who was released in August 1989, under the interim policy after she admitted to having been involved in homosexual activities. (There were a number of other cases, but hers is of central interest). Her complaint was filed under the provisions of the Charter, and she asked the Court to find that her rights had been denied by the CF and that, more broadly, the CF's policy on homosexuality was in violation of the Charter (Federal Court, 1992).

Thus, in conjunction with information-gathering on the issues raised in the CTF Final Report, carried out by the NDHQ OPI, discovery hearings, aimed at building a foundation based on evidence, also commenced and periodic reviews of the evidence, as it accumulated, were conducted (Personal Communications, Director General Personnel Policy, February 1993). Given the weaknesses and inconsistencies in the social and behavioral science research, indicated earlier, and the events that followed,

the evidence supporting the policy was considered inadequate to meet legal challenge (see, e.g., Clark, 1993).

Counter-Arguments to Current Policy. As already indicated, neither survey results nor external reviews yielded definitive proof that open employment of homosexuals would lead to unmanageable negative effects on cohesion, morale, and unit social and operational functioning. In fact, reports emanating from the U.S. during the review period indicated that declared homosexuals successfully served during the Persian Gulf War, and did not destroy cohesion and morale; known homosexuals in the CF, being held under the interim policy, were not creating difficulties; and, the Australian Defence Force, similar in many ways to the CF, was in the process revoking its homosexual policy. These all represented counter-arguments to retention of current CF policy.

Other issues considered in the review were medical risk and privacy concerns. According to other information made public (DND, 1992), the risk of sexually transmitted diseases (STDs) would unlikely be increased by the open employment of homosexuals. For example, statistics being compiled by Health and Welfare Canada (1990) and reported in the media (Macleans, 1990) indicated that the risk of HIV/AIDS is the lowest among lesbians, and that there is very little difference in risk between homosexual and heterosexual males. (As a matter of policy, CF members are not routinely tested for HIV and their permission must be obtained for doing so). The spread of other STDs can be controlled through conventional medical means. As to risk of contamination from blood transfusions, the CF does not depend on individuals to be walking blood banks; rather, they normally use Red Cross blood and plasma and, where necessary, blood screening can be carried out using Red Cross criteria. Risk to medical personnel can be reduced by normal precautions, which are already part of standard operating procedures. Thus, the medical risk argument is largely one of convenience and is not convincing.

As to privacy, the predicted negative impact of employing homosexuals is, at best, highly speculative, given the questionable validity of the attitude survey data and the lack of direct proof of effect on unit cohesion, effectiveness, etc. Shawver's (1991a and b) assessments suggest that there is a basis for overcoming negative reactions to privacy concerns that might disrupt operations at the unit level, and this alternative carries as much legal weight as the untested assumptions and abstract proofs advanced as evidence for homosexual exclusion. In short, the evidence available for presentation to the Court would not have sustained a legal argument for the exclusionary policy.

All of the above would have been obvious in October 1991, when, according to media reports, the CF was ready to change the homosexual policy (Clark, 1993). However, government approval was not obtained at that time, and the interim policy remained in effect.

Court Declaration/Revocation of Policy. In April 1992, the court date for Michelle Douglas versus Her Majesty the Queen was set for October 27, 1992. Douglas was to be represented by one of Canada's most successful litigation lawyers, and preparations for handling that case and others continued throughout the ensuing period. However, the case was actually settled out of court (again, reinforcing the appearance of weakness of the DND/CF position) but the Federal Court saw fit to issue a declaration stating that CF's policies restricting the service of homosexuals was in violation of Section 15 of the Charter. According to a Canadian Forces Personnel Newsletter (CFPN) (1992) article prepared especially for the purpose of communicating the policy change, the DND and CF agreed that this was the case and all restrictive policies on homosexuals were revoked.

Implementation--New Policy. Direction on the revocation of the policy to commanders in the field was given separately by the CDS and, later, by the Assistant-Deputy Minister (Personnel). Full support was expressed for the change, explanations

as to why the change was necessary were provided, along with a reminder of the responsibility of leadership to support the change and an appeal to the sense of fairness of members. There was also a clear implication that those who could not support the policy change had the option of leaving the CF.

It was pointed out that the exclusion policy was consistent with previous Canadian attitudes and legislation but that both attitudes and legislation had changed, and that "the policy no longer serves the best interests of the CF and its members" (CFPN, p. 2). At the same time, it was emphasized that inappropriate sexual conduct by all members of the CF was unacceptable and would not be tolerated; in this regard, policy and guidance on the changed situation were forthcoming.

Other Actions. The policy change was implemented within the overall context of equality rights and non-discrimination, but without any special education or training centered specially on sexual orientation policy. The approach was deliberately low-key with specific emphasis placed on the responsibility of all levels of leadership to make the change work. However, coincidental with the cancellation of CFAO 19-20 on Homosexuality-Sexual Abnormality, Investigation and Medical Examination and Disposal, were the following: the issuing of a new CFAO 19-36, Sexual Misconduct, which specified "zero tolerance" of both homosexual and heterosexual misconduct; amendment to CFAO 19-39, Personal Harassment to include homosexual harassment, and CFAO 19-38, Mixed Gender Relationships, to include homosexual relationships or restrictions thereof. Taken together, they represent a substantial regulatory framework governing heterosexual and homosexual interaction, and they provide policies and guidelines for conduct and procedures for dealing with violations. These CFAO documents have been widely distributed. The focus on the unacceptance of sexual misconduct and harassment, from whatever source, and the removal of all specific references to homosexuality has signalled the CF's intention to treat all members equally. This applies both positively and negatively.

Henceforth, there can be no attempt to elicit an applicant's or a member's sexual orientation; nor if homosexuals choose to declare themselves can that knowledge be used to justify restrictions. CF members do not have the right to determine with whom they will or will not work or share facilities, and there is no expectation that this will change with the new inclusion policy.

Outstanding Issues. There are, of course, outstanding issues to be resolved, especially since the policy change carries with it a statute of limitations of seven years, dating back to when Section 15 of the Charter came into effect. Human and Charter rights complaints can be expected from former members or from those who were denied entry, owing to sexual orientation, as well as redresses of grievance from those serving, whose careers have been adversely affected by the policies. At least 12 of the latter have already filed (Clark, 1993). Negotiated settlements are being reached with those who have filed complaints through the courts, and those filed with the CHRC will be dealt with in the same way. Those who were restricted under the interim policy have been notified that their restriction is now lifted, and each case will be examined to determine if they have been disadvantaged by the application of the policy. If affirmative, then adjustments will be made on a case-by-case basis. Those who were released before the interim policy came into effect are not part of the review but they are eligible to apply for re-entry.

Impact of Policy Change. Despite the dire predictions, there has thus far been no noticeable impact on recruitment, employment, attrition, retention, cohesion or morale: that is, as nearly as can be determined. There is no systematic monitoring of effects, but if there were major problems they would probably be evident in some part of the military system. Commands, recruiting regions, and NDHQ staffs report that there has been virtually no change since the policy has been announced, and it is not known whether or not homosexuals who were serving have declared themselves -- which would constitute a test of the reactions of heterosexuals.

There are possible explanations for this lack of effect. First, there was a long lead time from October 1991 to October 1992, when it was expected that a policy change announcement was imminent, and this may have permitted CF members to become accustomed to the outcome. Second, since the issue was discussed during senior staff visits from NDHQ to subordinate commands and units, much of the heat may have been taken out of the negative arguments for those who were most adamantly opposed. In many cases, they would have had benefit of the factors upon which the policy had to be defended, including the counter-arguments for policy change. Third, the fact that a great deal of effort was being expended in dealing with discriminatory attitudes toward women and with issues of sexual and personal harassment may have helped create an atmosphere of greater tolerance. Fourth, the fact that the CDS and senior leadership took a positive and supportive approach may have reinforced acceptance of the policy change; the low-key but firm leadership expectation strategy, combined with an effective regulatory framework may have acted as a signal to both homosexuals and heterosexuals that safeguards were adequate to support the change. Fifth, there are a number of other confounds, such as poor job market conditions, low levels of recruitment, and a CF personnel reduction program that may have the effect of suppressing reactions; CF members may well feel it is better to have a job than to tilt against the system.

It is possible that all of these and others unnamed are at work; it is also possible that the affective and potentially dysfunctional side of this change has yet to be worked through. This is somewhat doubtful, however, since both the law of the land and the policy framework itself are strong and logically consistent, and the change is backed by a solid majority of the Canadian public: 67%, according to the most recent poll (Clark, 1993).

Moreover, the CF plans to include homosexual and heterosexual harassment as part of a comprehensive video-based training and education program, and this is bound to have some positive effect. Regardless of the short-term effects, which at this

point appear to be no effect at all, most of the necessary supports are in place or in development to accommodate acceptance of homosexual employment in the long term.

CONCLUSIONS

Concluding Comments. This paper has provided a framework through which to view change on one of the most controversial issues faced by the CF or, indeed, any military: the lifting of prohibitions on the employment of homosexuals. The initial arguments advanced for retaining the policy of exclusion were highly consistent with the operational imperatives conception: homosexuals threaten military group norms and values, and their inclusion risks disruption to group functioning and operational effectiveness. The arguments in favour of inclusion were consistent with the social imperatives conception that the military should reflect changing norms and values of its host society, particularly those that remove discriminatory practices and extend individual rights and opportunities for employment. The removal of restrictions on homosexuals is associated with influential factors in the changing socio-legal context, as they are embodied in strong, effective Canadian human and equality rights legislation; this change brings CF institutional practices more into line with others in Canada, which is the way Canadians want their military to operate.

It is too early to assess fully the various long-term implications of the policy change, but it may be anticipated that most difficulties to be dealt with will have less to do with negative impacts on cohesion, morale and effectiveness than with the provision of equitable levels of compensation and benefit support for same-sex families. At present, the Canadian government defines marriage in terms of opposite gender couples. However, at least two provincial governments and an increasing number of employers are providing leave and other marital/family-related benefits on the basis of same-sex co-habitational arrangements; this trend is likely to continue. At

some point in the future, the CF may have to confront these logical extensions of policy change now in effect.

While we recognize that other Western countries are subject to similar social currents, there is enough uniqueness in the Canadian case to restrict generalizability to other nations' armed forces, including the U.S. That homosexual policy in the latter can or should be changed is obviously a matter for the U.S. government, society and the military to decide. However, it is hoped that this report contributes to identifying some of the key issues and influences that surround such change, and to show that in the short-term, at least, there have been virtually no consequences of lifting the ban on known homosexuals in the CF for all important dimensions.

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