

What Motivates Minnesota's Fortune 500 Companies to Create
Equitable Work Environments for GLBT People?

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Abstract

Due to rapidly changing social movements U.S. organizations have paid increasingly more attention to gay, lesbian, bisexual, and transgender people in the workplace. Organizations are ranked and evaluated by national organizations such as the Human Rights Campaign Foundation (HRC) on work policies about, and inclusion, beliefs, and treatment of gay, lesbian, bisexual, and transgender (GLBT) employees. These factors, combined with the larger GLBT social movement, have caused many organizations to invest heavily on initiatives to create equitable work environments for GLBT people. Developing and adapting Human Resource (HR) policies and practices to accomplish this is difficult, time consuming, and costly to organizations—which begs the question: What motivates organizations to create equitable work environments for GLBT people? To that end, using a qualitative collective case study approach this inquiry provides a deeper understanding of why organizations spend significant resources to create equitable work environments for GLBT employees. The focus centered on the 21 Fortune 500 corporations headquartered in the state of Minnesota. This study found five primary reasons why these organizations have created GLBT inclusive work environments. These five factors are: positive return on investment, element of a broader diversity initiative, internal organizational pressure, parity with other Minnesota companies, and chance.

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CHAPTER 1

Introduction

Study Focus

As outlined by the Human Rights Campaign Foundation (HRC; 2009) the current patchwork of state and local employment discrimination laws which prohibit discrimination based on sexual orientation and gender identity covers few Americans, “approximately 172 million of the 281 million U.S. citizens—more than 3 of every 5 citizens—reside in areas that do not provide protections” (p. 2). Further, the federal government has not provided any legal protections based on sexual orientation or gender identity (HRC, 2009). Given that in most areas protections for gay, lesbian, bisexual, or transgender (GLBT) persons are not outlined by law, coupled with the fact that a significant number of Americans oppose the legitimacy of the GLBT rights, U.S. corporations face a dilemma. With the legislative absence of federal or state regulations, organizations struggle to find a balance between creating equitable work environments while risking potential boycotts from the public. This quandary has emerged to become an intense national debate leaving organizations with significant questions amid a small number of resources, little guidance, and few examples of best practice.

Despite the criticism of support for GLBT rights in the workplace, a drastic increase in the number of corporations which include GLBT-inclusive HR policies and practices has occurred. June 2006 marked a milestone for GLBT employees—for the first time a majority of Fortune 500 companies offered domestic partner benefits (HRC, 2006). In addition, a total of 85% of the Fortune 500 organizations now have protections

based on sexual orientation (HRC, 2009). These recognitions of GLBT rights in the workplace have appeared at a time when the federal government and the majority of states do not recognize same-sex domestic partnerships. As Davidson and Rouse (2004) wrote, “the fact that corporate America is choosing to recognize same-sex couples, despite their lack of legal recognition, is noticeable, puzzling and promising” (p. 23).

The growing trend of GLBT inclusion within Fortune 500 organizations has not been paralleled by an equal amount of scholarly inquiry. Although numerous organizations have developed policies that affirm sexual diversity in the workplace, little research exists on the implications of these policies for the GLBT employee or the organization they work for (Button, 2001). A review of the literature identified few studies that specifically examined the motivation behind corporate America’s move to create GLBT inclusive work environments. In addition, few scholarly inquiries have examined GLBT persons in the workplace. The lack of information available is regrettable as this evidence has the potential to be of great benefit to organizations seeking to create equitable work environments. Until better designed empirical studies are completed, organization leaders need to rely on instinct, consultant recommendations, and the few available scholarly inquiries to make decisions as to how and where to proceed with diversity management programs (Ivancevich & Gilbert, 2000).

Purpose of Study

The purpose of this case study is to investigate the motivational factors of Fortune 500 organizations in the state of Minnesota which spend significant HRD resources to create equitable work environments for GLBT employees. The case is bound by both

location in the state of Minnesota and categorization as a Fortune 500 organization.

Within this inquiry, equitable is defined as dealing fairly and equally to all persons. From the organizational perspective of this inquiry, being equitable requires providing the same benefits, in the same way, to GLBT persons when compared to their heterosexual peers.

The Importance of the Problem

Research on GLBT equality in the workplace is important for four specific reasons: (a) previous inquiry on the topic is lacking, (b) research coincides well with current national discourse, (c) the size of the GLBT population is considerable, and (d) inquiry on sexual orientation raises significant topics not found among other often studied minority groups.

Despite increasing significance, numerous authors have cited empirical inquiry regarding sexual orientation in the workplace as scarce (Pope et al., 2004; Van Hove & Lievens, 2003; Ward & Winstanley, 2006). Numerous authors have cited the lack of scholarly research on the subject of GLBT persons in the workplace (Ragins & Cornwell, 2001). After completion, this research provides a framework for future discussion and advances what has been produced within the literature. Specifically, this research adds significant discourse to the field of human resource development (HRD) in areas of organization development (OD), diversity management, and GLBT employees in the workplace. Recognizing that little research has been conducted on this topic this study ties related research together in a manner that helps further our understanding of GLBT people in the workplace and the study of HRD.

The relevance of GLBT concerns in the workplace comes to fruition during a period when many organizations, and American society as a whole, are debating the rights of GLBT persons. In recent elections GLBT rights, especially same-sex marriage and rights in the workplace, have been contentious political issues. Therefore, the timing of this inquiry coincides well with the national debate on the rights of GLBT persons.

As noted by Kauffman (1998) the exact number of GLBT persons is undoubtedly a matter of debate. Currently the U.S. Census Bureau does not measure the number of people who identify as GLBT. Even if the census did pose the question, many people choose to keep their GLBT identity a private matter. To further complicate the issue, little scholarly inquiry has been done on the number of people who identify as GLBT. A precise answer to this question simply does not exist. In the absence of scholarly inquiry market research may provide some insight. Harris Interactive, a global marketing research company, suggests that 4% to 9% of the population identifies as GLBT (Taylor, 1993). Kinsey (1948) in a ground breaking scientific study found that 4% of the population identified themselves as being exclusively homosexual. The HRC (2007) estimated the number of gay, lesbian and bisexual adults residing in the U.S. range from 8.8 to 15.3 million. For the purpose of this study a conservative range of 3% to 5% of the population is assumed to identify as GLBT. In 2010 the U.S. Census Bureau (2010) measured the total U.S. population to be 308,745,538. Using a rounded total of 309 million as a starting point, and applying our conservative estimate on GLBT population of 3 to 5%—a reasonable estimate can be calculated; the estimated number of GLBT persons in the US is somewhere between 9.27 to 15.45 million.

It is estimated that in 2009 there were 154 million people in the American workforce (Bureau of Labor Statistics, 2009). The conservative estimate used within this inquiry advocates that 3% to 5 % of the population identifies as GLBT. This suggests that of the 154 million people in the workforce approximately 4.62 to 7.7 million people can be considered GLBT, or sexual minorities.

It is important to note that, unlike gender and race, identifying as GLBT is not always apparent to others. Often, people who are GLBT are able to choose who they wish to share their orientation with. This ‘selective disclosure’ is unique in the study of minority groups. In addition, as written by Johnston and Malina (2009), in contrast to societal views on race and gender, a significant portion of the population endorses negative views on GLBT topics. This circumstance creates an interesting, yet challenging layer to research on GLBT people in the workplace.

Taken together these ideas lead to the following conclusions significant to this study: (a) sexual minorities in the U.S. workforce are considerable in number and (b) in the absence of federal legislation a significant number of the U.S. workforce is at risk for discrimination.

General Problem

My inquiry seeks to understand why organizations are spending significant amounts of resources to create equitable work environments for GLBT people. As noted by Johnston and Malina (2009), management should carefully decide how to reconcile competing views of corporate responsibility and society’s occasional negative views of GLBT rights in the workplace. The focus of this study is on Fortune 500 corporations

headquartered in the state of Minnesota. Central to the research agenda is an examination of the interaction between employee advocate groups, senior HRD professionals, and external stakeholders as it relates to an organization's motivation to create equitable work environment. I contend that organizations have found a significant return on investment (ROI) to the bottom line by creating equitable work environments for members of the sexual minority. To help advance the study of GLBT employees in the workplace this inquiry will provide much needed insight on organizations that have been recognized by the Human Rights Campaign Foundation (HRC) as creating an inclusive work environment. This research will include interviews with HRD professionals, leaders of employee advocate groups, and organizational literature from organizations within the study.

Statement of the Research Question

What has motivated Fortune 500 organizations in Minnesota have chosen to spend significant HRD resources to create equitable work environments for GLBT people? The following subquestions will help guide the inquiry: (a) do organizations find a return on investment (ROI) for providing an inclusive work environment for GLBT employees? and (b) from an employee's perspective what are the benefits to the organization for being GLBT inclusive? It is important to recognize that these research questions were used as an initial starting point and additional questions developed during the inquiry. As Maxwell (2005) reported:

Research questions that are precisely framed too early in the study [for qualitative inquiry] may lead researchers to overlook areas of theory or prior experience that are relevant to the understanding of what is going on, or cause researchers to not pay enough attention to a wide range of data,

data that can reveal important and unanticipated phenomena and relationships. (p. 67)

These additional insights help to nurture the investigation and allow the research to adapt as needed. The central question and supporting subquestions will be a starting point that is flexible, fluid, and adaptable as the inquiry progresses.

The Focus on Minnesota

Regional influence on the progression of GLBT rights in the workplace is evident in the literature. As reported by Davidson and Rouse (2004), the surge of GLBT rights in the workplace in 1998 was localized in the Pacific Northwest and may be, in part, due to ordinances passed by the cities of Seattle, Los Angeles, and San Francisco. A recent study found that the Fortune 500 rank, industry sector, commitment to diversity, and region are significant aspects associated with offering domestic partner benefits (Davidson & Rouse, 2004). In the state of Minnesota it is illegal to discriminate based on sexual orientation or gender identity in employment, housing, public accommodations, public service, education, credit, and business. In addition, the cities of Minneapolis and St. Paul have ordinances that make it illegal to discriminate based on gender identity in those jurisdictions—Minneapolis in 1975 and St. Paul in 1990 (HRC, 2008). However, these laws only require that organizations within those jurisdictions do not discriminate; the laws do not require that organizations provide inclusive programs, initiatives, or same-sex benefits to GLBT persons. An organization's decision to be inclusive well beyond the legislative mandate of nondiscrimination makes the focus on Minnesota appropriate and intriguing.

Study Boundaries

This research focuses on the motivational factors for Fortune 500 organizations in the state of Minnesota to spend significant HRD resources to develop equitable work environments for GLBT persons. Various topics relevant to GLBT issues in the workplace or ensuing themes have not been explored and will be considered outside the scope of this research. Specifically, topics not explored include: (a) broad diversity initiatives not focused on GLBT topics, (b) the financial cost to create an equitable work environment, and (c) other measures of workplace equality beyond the Corporate Equality Index (CEI). Last, as noted earlier, this research is limited to Fortune 500 companies headquartered in the state of Minnesota; of which 21 existed in 2010.

Specific limitations have been identified for this study. The first limitation, due to the case study methodology, is that emergent themes can not be generalized beyond the organizations studied. The qualitative case study approach provides an understanding only within the case being studied; e.g., the organizations chosen for this research. Case studies cannot be used to set a precedent, or to apply findings to similar cases. In addition, this case study will collect data in an open, uncontrolled environment in which the phenomena being studied occur. Therefore, case study research has the potential to be impacted by external factors outside the control of the researcher.

Key terms and concepts

For the purpose of this discussion GLBT is an acronym referring collectively to gay, lesbian, bisexual, and transgender people. What exactly is the meaning of GLBT? Defining each subcategory within the GLBT acronym is complicated by significant

disagreement in the literature, especially within the transgender category (see Table 1). It is generally accepted by many people, within and outside the GLBT community, that gay, lesbian, and bisexual people's interests are the same, if not identical, to those of transgender people (Devor, 2002). Although this will be a review for some readers, for clarity I'd like to further define the subcultures within "GLBT" (see Table 1). Within the course of the literature review for this inquiry it has become clear that various vocabulary terms are not used with consistent meaning. Also, some terms used may be new or ambiguous to individuals outside the subject area (see Table 2). To minimize confusion, Table 1 and Table 2 are provided.

Table 1

GLBT Acronyms

Term	Definition
Gay male	Gay refers specifically to males with a sexual orientation or affectional orientation predominantly (not necessarily exclusively) toward males.
Lesbian	In this context, lesbian refers to females with a sexual orientation or affectional orientation predominantly (not necessarily exclusively) towards females.
Bisexual	Bisexual refers to people who are attracted to more than just one sex or gender.
Transgender	This term is generally used as a term describing individuals centered on the partial reversal of gender roles. As an example, people who feel that the gender they were given at birth is a false—or an incomplete—description of themselves.

Note. There is no connection between sexual orientation and transgender. People who are transgender can be heterosexual, gay, lesbian, or bisexual (Smith, 1995); References include: Devor, 2002; Pierce, 2001; & Smith, 1995.

Table 2

Additional Definitions of Importance

Term	Definition
Corporate Equality Index	The HRC Foundation's Corporate Equality Index (CEI report) is released each fall and provides a thorough analysis and rating of large U.S. companies and their policies and practices relevant to gay, lesbian, bisexual, and transgender employees (HRC, 2010).
Closet	Major metaphor for GLBT people who choose not to disclose their sexual orientation
Corporate Social Responsibility	Organizational actions that advance social good or social welfare above and beyond the requirement of the law
Domestic partnership	This term identifies the individual relationship between two people who are living jointly and sharing a common domestic life together who are not coupled in any marriage, civil union, or legal partnership. The term can also apply to a partnership between an unmarried heterosexual or homosexual that implies cohabitation and eligibility for spousal benefits most often associated with marriage.
Domestic Partner Benefits (DPB)	Benefits, including medical, dental, and life insurance provided to the domestic partner of an employee
Employee Advocate Groups	An employer-recognized group created to provide a voice and/or community for underrepresented persons within the organization. Often these groups can increase organizational effectiveness or provide a competitive advantage.
Equality	The state or quality of being essentially equal or equivalent; equally balanced (Merriam-Webster, 2010)
Fortune 500 Organizations	An annual list of the 500 largest companies in the U.S. as compiled by Fortune magazine. The methodology focuses on published revenue data (Fortune, 2010).
Gender	The traits and behavior typically associated with either female or male
Gender identity	How persons identify themselves in terms of their gender. Can be male, female, or neither. Gender identity is not necessarily based on sexual orientation.
Gender Stereotypes	Society's idea of what traits and behavior is associated with being female or male
Heteronormative	Vocabulary used to describe the marginalization of nonheterosexual lifestyles and that the view that "normal" behavior is exclusively heterosexual
Homophile	To be gay (cont.)

Term	Definition
<i>(Table 2, cont.)</i>	
Homophobia	Characterized by dislike or hatred toward homosexuals, including both cultural and personal bias against homosexuals
Homosexual	Directing desire towards someone of the same sex. Having sexual relations between members of the same sex. Often associated negatively with pathology
Human Rights Campaign Foundation (HRC)	Through research, educational efforts, and outreach, the Human Rights Campaign Foundation encourages lesbian, gay, bisexual, and transgender Americans to live their lives openly and seeks to change the hearts and minds of Americans to the side of equality (HRC, 2010). The HRC Foundation is a nonprofit, tax-exempt 501(c)(3) organization.
Nonheterosexual	The opposite of directing desire towards someone of the opposite sex. Often used in GLBT literature to describe a “queer” behavior or lifestyle.
Queer	Pertains to topics of homosexuality and refers specifically to lives or practices not considered normal. Increasingly used in the literature as an alternative to gay or lesbian.
Queer studies	More than researching homosexual lives, it is researching/theorizing why/how/when lives are “queered” outside of the norm.
Senior HRD Professional	Within an organization this person serves as the official leader of the HRD function and its staff (Gilley et al., 2002).
Sexual minority	A group whose sexual identity, behavior, or orientation is different compared to the majority of the surrounding community
Sexual orientation	The orientation within people that leads them to be emotionally and physically attracted to individuals of one gender or the other or both
<i>Note.</i> Adapted from Dilley, 1999; HRC 2009; Johnston & Malina, 2009; Smith, 1995, Sullivan, 2003, and conclusions reached by the author	

Summary

Due to the absence of federal regulations, only some GLBT employees are protected from discrimination by a patchwork of local legislation. The national discourse on the GLBT employment rights, same-sex marriage, and equality is often contentious. That being said, the majority of Fortune 500 companies has chosen to value its GLBT employees and has spent significant resources to create equitable work environments. Surprisingly, authors agree that research on GLBT persons in the workplace and on motivations for companies to create GLBT equitable work environments is scarce.

Due to local employment law, the location of the researcher, and because researchers have noted that location can be a significant influence, the focus is on Fortune 500 organizations in the state of Minnesota. This research project designed to develop a better understanding of why Fortune 500 organizations in the state of Minnesota spend significant HRD resources to develop equitable work environments for GLBT persons. Specifically, this study sought to understand why Fortune 500 organizations in Minnesota have chosen to spend significant HRD resources to create equitable work environments for GLBT people. Following qualitative inquiry best practice, this research question was selected as an initial starting point and additional questions will develop during the inquiry as themes emerge.

As noted by some authors, research on GLBT equality in the workplace is important for four specific reasons: (a) previous inquiry on the topic is lacking, (b) this research focus coincides well with current national discourse, (c) the size of the GLBT population is considerable, and (d) inquiry on sexual orientation examines significant

topics not found among other often studied minority groups. This research helps to fill a void in the subject area and works to advance our understanding of the motivations behind creating GLBT equitable work places.

CHAPTER 2

Review of the Literature

Historical Influences

As Cook-Daniels (2008) wrote, “Every person is shaped in part by the major public events that happen during their lifetime, whether these events are tragedies like 9/11 or struggles and triumphs like the Civil Rights Movement or the passage of the Americans with Disabilities Act” (p. 485), and these life events contribute significantly to a person’s worldview. From a GLBT perspective, numerous public events shape perception of their roles and rights in the workplace and are worth considering. The historical development of GLBT people in the U.S. workplace has been shaped by key factors that include: (a) history of the GLBT movement, (b) changing political and societal ideals (e.g., AIDS, media, and literature), (c) the field of psychology, (d) same-sex marriage debate, and (e) federal legislation (Civil Rights Act, ENDA, political dichotomies). Attempts at a complete study of these historical influences would easily necessitate several books and would be outside the scope of this inquiry. Instead, we recognize that the GLBT movement has been significantly shaped by these key factors and provide only a short overview of noteworthy factors that influenced perceptions of GLBT persons in the workplace. This brief overview is centered in the U.S. and begins in the 1920s.

The first record of an organized, although unsuccessful, gay and lesbian movement in the U.S. took place in Chicago during the early 1920s. Henry Gerber, a postal worker who served in the military throughout World War I, founded the Society

for Human Rights (SHR) which advocated law reform and public education related to GLBT rights (Kepner & Murray, 2002; Cook-Daniels, 2008). SHR is believed to have produced the first gay and lesbian publication in the U.S., titled *Friendship and Freedom*, of which only two editions were published (Kepner & Murray, 2002). By means of these writings Gerber is credited with instigating the early development of the GLBT movement with individuals that would later lead the Homophile movement of the 1950s (Kepner & Murray, 2002).

Internationally, gay and lesbians also began to organize. During the 1920's in Berlin, Germany became a place where gay and lesbian activism flourished. However, the progressive atmosphere in Germany, and indeed around the world, quickly changed with the rise of Nazi power and the beginning of World War II. As war engulfed Europe, GLBT activists and movements found Germany increasingly hostile; gay and lesbian groups were silenced completely, including all their publications. As Churchill (2009) writes:

The period of greatest prosperity of European homosexual sexology and rights discourse simply seems to have vanished in the smoke and flames of the Second World War, and a completely separate historical narrative emerges It is if the Nazi burning of Magnus Hirschfield's library on May 10, 1933 . . . spelled the end of historically important homosexual activism and thought in Europe. (p. 31)

World War II is recognized as a transition point for the GLBT movement in numerous ways. For the international gay and lesbian movement this marked the first significant setback in the quest for equality. In the U.S. the rise of World War II also brought increased attention to military service of gays and lesbians. Gay men and lesbians were considered unfit for military service throughout WWII (Cook-Daniels,

2008; Van Den Bergh, 2003). The war also marks a major transition point between the early GLBT movement and the homophile movement that followed in the 1950s.

Many historians agree that the years after the end of World War II became some of the most socially repressive in U.S. history. American culture vigorously persecuted homosexuality from the 1940s to the 1960s (Drescher, 2008). Between 1947 and 1950 the federal government denied 1700 people employment based solely on alleged homosexual behavior (Van Den Bergh, 2003). In 1950, related to a hearing on State Department dismissals, the Senate endorsed a wide-ranging investigation on homosexuals and other 'perverts' in national government (Cook-Daniels, 2008). Being publicly out as homosexual during the 1950s often led to exile by the heterosexual majority and by homosexuals fearing guilt by association (Martin, 2001).

After the war, GLBT organizations began to re-form and new organizations in the United States were born. The postwar surge of these gay and lesbian organizations is known collectively as the Homophile movement. The term homophile soon became a common designation for the emerging postwar GLBT movements. GLBT organizations were happy to emphasize the respectable romantic side of their relationships, preferring the term homophile over the scientific description of their orientation, homosexual. From a historical perspective these groups are recognized for being politically cautious in comparison to the GLBT movements that came before and after. As Meyer (2006) wrote, homophile organizations sought responsible citizenship while at the same time pursued social and legal reforms to improve the lives of homosexual people.

Two well-known organizations emerged in the United States during the 1950s and 1960s: the Mattachine Society and the Daughters of Bilitis (DOB; Churchill, 2009; Cook-Daniels, 2008). These relatively ‘secret organizations’ held meetings and released publications (Harvard Law Review, 1989). Founded primarily for political activism, support, and social opportunities, these organizations are the predecessors to today’s GLBT organizations. Typical of new organizations, each one had unique struggles and tribulations but emerged to make considerable impact on the GLBT movement. In addition, these decades saw the emergence of the most influential homophile publications, *One Magazine*, *Mattachine Review*, and *The Ladder* (Churchill, 2009). By fighting for equal rights, the homophile movement laid the groundwork for separate, organizationally anonymous, homosexual groups to emerge and thrive in subsequent decades (Hall, 2008).

The Mattachine Society was founded in Los Angeles in 1950 when a small group of gay men came together to organize in defense of their rights as American citizens (Martin, 2001). The society is credited as being the first postwar gay organization in the United States and had significant influence on society during the 1950s and 1960s. By the end of the 1950s the Mattachine Society had evolved as a distinctive, national, nonprofit organization that facilitated a change in the public perception of gays and lesbians from sexual deviants to well-respected and valued human beings (Marcus, 2002; Martin, 2001).

The Mattachine Society also pioneered relationships with researchers who advocated the reform of America’s sexual ideas and laws. Evelyn Hooker, Alfred Kinsey,

and Harry Benjamin utilized the society's resources to assist with research endeavors (Martin, 2001). The organization endeavored to be a national resource for GLBT people and advocates. In June of 1964 *Life Magazine's* article, "Homosexuality in America", prominently featured the Mattachine Society; it resulted in a flood of inquiries that the organization's small staff was unable to answer (Martin, 2001). The history of the Mattachine Society was short lived. By the end of 1964 the society had become obsolete. Financial troubles and competing activist organizations with different agendas took their toll (Martin, 2001).

Founded in San Francisco in 1955, Daughters of Bilitis (DOB) is the first American lesbian rights organization. The organization lasted for 14 years and focused on education, social inquiry, and mental health professionals. The name was chosen during the second meeting. "Bilitis" is based on the fictional lesbian contemporary of the 1894 work, "The Songs of Bilitis". Chosen for its obscurity; even the founders didn't know what it meant (Lyon, 2002). "Daughters" was chosen as it related to other American social movements such as the Daughters of the American Revolution. Just a year after its inception, most of the original founding members were no longer part of the organization, but their membership numbers had grown. By the end of the 1960s, DOB chapters existed in New York, Los Angeles, Chicago, and Rhode Island (Lyon, 2002). After unsuccessful attempts to advertise DOB, the organization began to print its own membership newsletter, *The Ladder*, becoming the first nationally distributed lesbian publication in the U.S. The DOB promoted itself as "A Woman's Organization for the

Purpose of Promoting the Integration of the Homosexual into Society" (Cook-Daniels, 2008; Lyon, 2002).

The homophile movement continued into the 1960s and helped facilitate the creation of visible GLBT communities. During this time frame, the GLBT movement engaged in sit-ins, picketing, and identified itself publically for the first time. In 1966, three members of the Mattachine Society entered a bar, publicly proclaimed they were homosexuals, and ordered drinks, which challenged the bartender to break the State Liquor Authority regulation forbidding service to homosexuals (Clendinen & Nagourney, 1999). This small altercation resulted in a state appellate ruling that struck down the ban on serving homosexuals and was the first successful legal challenge in almost a decade (Clendinen & Nagourney, 1999). Still, at this point in history, most GLBT people were integrated, or hidden, into heterosexual society so that they could hold onto jobs, have decent housing, keep their kids, and avoid physical violence (Devor, 2002).

During the Cold War gays and lesbians faced increased and overt oppression in the U.S. including military and government employment (Cook-Daniels, 2008). Within American culture, anticommunist feelings became associated with government employees who had personal secrets; for example gays and lesbians. As such, the government began to pass legislation to identify members of "subversive" groups and to remove or prevent them from working in the federal government. In 1953 President Dwight Eisenhower issued an executive order banning the employment of homosexuals, labeled sexual deviants, by the federal government (Clendinen & Nagourney, 1999; Leonard, 2003; Cooks-Daniels, 2008). Under this executive order the sex deviates filing

system was created by J. Edgar Hoover, director of the FBI, which shared allegations of homosexuality among government agencies, including agencies outside of the federal government such as those in education and law enforcement (Clendinen & Nagourney, 1999). The visible and explicit oppression of this time period created the impetus for what was to become the modern Gay Rights Movement.

The riot began in the early morning hours on June 28, 1969, in New York City's Greenwich Village (Hall, 2008). On this Saturday morning eight police officers raided the Stonewall Inn, a local gay and lesbian bar. It is not certain how the riot began but, shortly after entering the bar, police officers began beating a person who was resisting arrest. A group of drag queens, lesbians, and street people came to this person's defense hurling jeers, stones, trash cans, and parking meters at the officers (Malone, 2000). The arresting officers were overtaken by the angry crowd. Word about the riot quickly spread to nearby residents and patrons from neighboring bars, many of whom rushed to the scene. Throughout the evening transgender people and nonconformists including masculine women and effeminate men were beaten by police officers regardless of whether or not they were involved in the original incident. The following day and evening brought even more demonstrators along with hundreds of onlookers who had heard about the previous night's uprising (Clendinen & Nagourney, 1999). At the riot's peak, a crowd of nearly 2000 people fought with 400 police officers (Malone, 2000). It is believed that the underlying anger throughout the gay community at being harassed by police and being treated by society as psychopathic perverts made the riots possible (Clendinen & Nagourney, 1999; Malone, 2000).

The Stonewall Riot of 1969 was the watershed moment and birthplace of today's gay rights movement in the United States. Most historians and authors agree that this is considered the key event that empowered the modern gay rights movement (Hall, 2008; Meyer, 2006). The significance of this event was the demonstration of collective resistance by the gay and lesbian community. Messages painted on the front of the Stonewall Inn illustrate and foreshadow this change in activism. In the early morning hours of the riot, the Mattachine Society wrote the following, "We homosexuals plead with our people to please help maintain peaceful and quiet conduct on the streets of the Village" but by the next morning a different message could be found: "Support Gay Power" (Clendinen & Nagourney, 1999). Overnight gay rights activism had moved from a quiet and educative social movement to something much more dissident in nature. The riots would soon become a symbolic force for gay liberationists across the nation well into the future (Hall, 2008; Meyer, 2006).

Three months after the Stonewall Riots activists began planning for and held an anniversary march in New York commemorating the riot. The next summer similar marches would be found in Los Angeles, San Francisco, and Chicago (Clendinen & Nagourney, 1999). Gaining momentum, the gay rights movement began holding major marches across the nation. As an example, in June 1970 possibly as many as 5000 people participated in a march to demonstrate the new strength and pride of gay people (Hall, 2008). These marches soon became known as Gay Pride Day which today is celebrated the last weekend in June. Another important outcome following the Stonewall Riots was the birth of a new organization called the Gay Liberation Front (GLF). Significantly, no

other gay activist group had used “gay” in the name before this (Clendinen & Nagourney, 1999) because the term was considered overly offensive. With posters and numerous manifestos the GLF was adamant on reshaping the vision of what it meant and looked like to be homosexual (Meyer, 2006).

The new gay activism of the 1970s had significant roots in the political activism of the 1960s. Similar to other social movements of the 1970s, gay activism drew on techniques of protest, political rhetoric, and ideology found within the 1960s (Hall, 2008). On the basis of these roots, the gay movement grew exponentially during the decade. As Hall noted, 50 gay organizations existed in 1969 and more than 800 existed 4 years later. Further, the GLBT movement won significant advances during the 1970s. By the end of the decade the gay movement was able to mobilize 100,000 people for the first national march on Washington for gay and lesbian rights, held on October 14, 1979.

American Psychiatric Association

In 1952 the American Psychiatric Association (APA) created a list of disorders formally called the Diagnostic and Statistical Manual (DSM), and described homosexuality as a sociopathic personality disorder, a classification similar to schizophrenia (Drescher, 2008). It is well documented that psychoanalytical attitudes at that time toward homosexuality could be described as hostile (Drescher, 2008). The belief among psychiatrists and the public at large was that homosexuality was a disease, something that needed curing or therapy. Many psychiatrists worked to cure homosexual people and to prevent it from “taking hold” in children (Murphy, 2008). Even today some

therapists and religious leaders claim that therapy can help men and women redirect sexual attraction from members of the same sex to the opposite (Murphy, 2008).

In a reaction to the Stonewall Riots of 1969, the American Psychiatric Association (APA) convened two panels of nonpatient gay activists who explained to audiences the negative stigma caused by psychiatric diagnosis (Drescher, 2008). At the same time the APA began to study the question of whether homosexuality should be considered a disorder (Scasta, 1998). The dilemma was discussed in depth over the course of 3 years. A major victory for gays and lesbians was won in 1973 with a controversial decision by the association's board of trustees that homosexuality alone was not a mental disorder (Drescher, 2008; Scasta, 1998). Two years later this resolution was officially adopted by the American Psychological Association (Conger, 1975) writing:

Homosexuality per se implies no impairment in judgment, stability, reliability, or general social and vocational capabilities; further, the American Psychological Association urges all mental health professionals to take the lead in removing the stigma of mental illness that has long been associated with homosexual orientations (p. 622).

In addition to the reversal of diagnoses on the DSM for homosexual behavior the APA also issued a groundbreaking statement that advocated civil rights protection for gay people in employment, housing, public accommodation and licensing, and the repeal of all sodomy laws (Conger, 1975; Drescher, 2008). After APA's decision the nation's cultural attitudes towards gays and lesbians gradually tended to change. Feelings became more tolerant in the late 1960s through the 1980s and within the field of psychology nonpathological theoretical models surfaced describing homosexuality (Drescher, 2008). Cain (1991) observes that professional understanding of homosexuality has undergone

fundamental transformation in recent decades and is recognized today as a nonpathological variation of human sexual development and expression.

AIDS Epidemic

The AIDS epidemic has had a profound impact on the historic development of GLBT persons in the U.S. workplace. Specifically, this epidemic shaped the discussion of GLBT persons in the workplace and shaped stereotypes, work culture, and national media attention. AIDS first emerged in the West in the early 1980s and had a disproportionate impact on gay and bisexual men (Harvard Law Review, 1989). Originally it was called Socially Transmitted Infection (STI) or Gay-related Immune Deficiency (GRID; Diedrich, 2007). In September of 1982 the CDC formally named the disease Acquired Immune Deficiency Syndrome (AIDS).

The disease was first reported by the Center for Disease Control in 1981. Today we know that HIV and AIDS are not limited to homosexual people. However, for part of the 1980s the epidemic was thought to have been exclusively a gay man's disease (Diedrich, 2007). The impact of this misconception created a new homophobia that accompanied the AIDS hysteria, leading to significant discrimination in the workplace (Harvard Law Review, 1989). Further, early in the history of the disease some organizations terminated employees who became infected.

During the 1980s the disease became a crisis, especially within the gay community. The epidemic first hit gay men in large cities and, in some areas of the nation, entire communities of gay men became ill and died. In response, numerous organizations, some focused exclusively on the gay community, took action. As cited in

the Harvard Law Review (1989), “Sharply conflicting attitudes toward homosexuality (in the 1980s) share(d) an uneasy existence in society. This range of viewpoints is in legislation, legal decision making, and legal scholarship” (p. 1511). We now know HIV is not limited to the GLBT community; however, for some the negative viewpoints linger. By 2001 the global pandemic had killed over 21 million, and an additional 36 million were infected (Markel, 2001).

Opinions Begin to Change

During the mid-1990s most Fortune 500 companies did not include the words homosexual, gay, and lesbian in their formal communications (Etsy, Griffin, & Hirsch, 1995). Further, identifying yourself as GLBT was likely to get you fired. However, recent trends in the workplace for gays and lesbians are increasingly favorable. The corporate emphasis on diversity issues has coincided with the emergence of gay employee organizations (Davidson & Rouse, 2004). Slowly the work climate for gay and lesbian people in the American workplace has undergone a partial revolution over the past 50 years (Leonard, 2003). In 2005 a record 92% of the country’s Fortune 500 companies included sexual orientation in their nondiscrimination policies (Graham, 2005).

The 1990s was a time of unprecedented growth in visibility for the GLBT community and, for the first time, the community was recognized as a considerable voting bloc (Cahill, 2004). In 1990 just 3 organizations in the U.S. provided family and bereavement leave for GLBT employees (Mickens, 1994). In addition, the HRC found (as cited in Raeburn, 2000) in 1991 only 1 employer in the Fortune 1000 had adopted domestic partner benefits. Beginning in the mid-1990s many organizations began to focus

on GLBT persons in the workplace (Maher et al., 2009) and several authors note a significant shift of opinion contradicting an era when sexual orientation may have been an issue (Pope et al., 2004). This shift of opinion was not always well received. Some organizations did experience negative reactions from employees who cited religious discrimination when required to attend GLBT training (Maher et al., 2009). Today 12 states, the District of Columbia, and more than 100 cities and counties prohibit employment discrimination based on gender identity and sexual orientation (HRC, 2009). By 2008 the majority of Fortune 500 organizations had made efforts to be GLBT inclusive, more than half— 263 out of 500—offered domestic partner benefits (DPB; Tannenwald, 2008). From a historical perspective the inclusion of GLBT issues within organizations in the U.S. is a very recent phenomenon.

Legislation

Currently each state, in the absence of federal regulations, has had the right to create and enforce its own discrimination protections based on sexual orientation and gender identity. The first state to provide sexual minorities protection from discrimination in both employment and housing was Wisconsin in 1982 (Romesburg, 2005; Rubenstein, 2002). Currently less than 20 states provide some kind of protection for sexual minorities in the workplace and, contrary to some myths, affirmative action does not include protection for gays and lesbians (Leonard, 2003). As of writing this 12 states: California, Colorado, Illinois, Iowa, Maine, Minnesota, New Jersey, New Mexico, Oregon, Rhode Island, Vermont, Washington, and the District of Columbia, prohibit discrimination on the basis of gender identity and sexual orientation (HRC, 2010a). Nine additional states:

Connecticut, Hawaii, Maryland, Massachusetts, Nevada, New Hampshire, New York, and Wisconsin, prohibit discrimination on the basis of sexual orientation (HRC, 2010a). In other words, it is legal in 29 states to fire someone on the sole basis of being gay, lesbian, or bisexual. Furthermore, over the past couple of years, 26 states have changed their constitution to define marriage as between one woman and one man (Levitt et al., 2009). This creates a challenging dichotomy for organizations wanting to create GLBT-equitable work environments.

Title VII

Contrary to common beliefs, Title VII of the Civil Rights Act and subsequent amendments do not protect GLBT persons from discrimination in the workplace. Specifically, the Civil Rights Act does not extend to protect persons on the basis of gender identity or sexual orientation (Martichowski, 2006; Tannenwald, 2008). What Title VII of the Civil Rights Act does preclude is discrimination based on race, ethnicity, national origin, religion, and sex (Van Den Bergh, 2003). In addition, federal law prohibits discrimination based on age and conditions of disability. As required by federal mandate, U.S. organizations began to formalize efforts to eliminate workplace discrimination beginning in the late 1960s (Ivancevich & Gilbert, 2000). However, since gender identity and sexual orientation is not protected, efforts to eliminate workplace discrimination based on these have not proceeded in the same way.

At this time no U.S. law covers discrimination on the basis of gender identity or sexual orientation (HRC, 2007). In the early 1990s a new strategy emerged that was focused on employment rights rather than on all of the rights outlined within the Civil

Rights Act. Beginning in 1994 the Employment Nondiscrimination Act (ENDA) has been introduced numerous times to Congress (Van Den Bergh, 2003). This legislation would require organizations with 15 or more employees, except religious organizations and the armed forces, to prohibit discrimination based on sexual orientation (Van Den Bergh, 2003). The bill has proposed adding both sexual orientation and gender identity to the list of protections from employment discrimination under federal law (HRC, 2007). ENDA has been proposed a total of 8 times beginning in 1994 (HRC, 2010a). Failure to pass this legislation demonstrates the lack of acceptance of the needs of GLBT in the workplace.

The Defense of Marriage Act

The Defense of Marriage Act (DOMA) was passed in 1996 and under this law states are allowed to disregard same-sex marriages that are legal in other states (Arm, Horne, & Levitt, 2009; Butler, 1998). Further, with the passing of DOMA the federal government defined marriage as a legal union between one man and one woman. Under the Full Faith and Credit clause of the U.S. Constitution, each individual state is required to recognize the public records and judicial proceedings of other states. In effect, DOMA prevents the federal government from recognizing same-sex marriages and gives states an exception to the Full Faith and Credit clause of the U.S. Constitution to do the same. Interesting to note is that Congress passed DOMA to curtail same-sex marriage before any state passed same-sex marriage amendments (Butler, 1998).

In 2010 two federal courts ruled DOMA to be unconstitutional. The first court found it to violate key constitutional principles of equal protection; the second ruled DOMA to exceed the power of Congress under the Spending clause and violated the

Tenth Amendment (Elrod & Spector, 2010). In addition, six states, the District of Columbia, and eight countries have now made same-sex marriage legal. This prompted the Obama administration, in February 2010, to announce it will no longer defend DOMA (Elrod & Spector, 2010).

Don't Ask, Don't Tell

The 'don't ask, don't tell' (DADT) is a landmark federal statute introduced as a compromise between Congress and President Bill Clinton who had campaigned to allow GLBT people to openly serve in the military. At the time, it was legal policy that homosexuality was incompatible with military service and persons who engaged in homosexual acts or stated that they were GLBT were to be discharged. Before DADT, from 1975 to 1985, the U.S. military had discharged over 15,000 people based on homosexuality (Harvard Law Review, 1993). The modified version, DADT, allowed GLB people to serve in the military if they concealed their orientation.

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After years of contentious debate and months of preparation, DADT was officially repealed in September of 2011. As quoted by CBS News, “Some in Congress still oppose the change, but top Pentagon leaders have certified that it will not undermine the military's ability to recruit or to fight wars” (CBS News, 2011). Under this repeal, the Defense Department will modify regulations to reflect the new law allowing gays to serve openly. The repeal also stops all pending investigations, discharges and other administrative proceedings (CBS News, 2011). In the national discourse on equality for GLBT persons, the repeal of this landmark legislation is certainly a celebrated win for gay advocacy groups. Since repeal of this legislation is very recent, it is difficult to foresee the impact of this decision on GLBT equality in the workplace (CBS News, 2011).

Out in the Workplace

Many GLBT people have found that the intersection between work and their personal lives is difficult to traverse. Sexual orientation is an extremely private matter and many people choose to keep private issues out of the work environment, citing professional reasons. Research has shown that lesbians and gay men hold highly varied attitudes toward their sexual identity and that the decision to share this information is highly complex (Button, 2001; Cain, 1991). The topic of self-disclosure, or ‘coming out’, has been a significant research area which has garnered the greatest attention (Creed & Cooper, 2008). As noted by Ellis and Riggle (1995), many gay men and lesbians feel the need to “hide” their sexual orientation in an environment that is not sympathetic to differences in sexual orientation. Ragins and Cornwell (2001) found that gay employees

who perceived discrimination were more likely to conceal their sexual orientation or, vice versa, more likely to disclose their orientation in work environments that were inclusive. The decision to affirm one's sexual identity depends strongly on the organizational context (Day & Schoenrade, 1997) and disclosing sexual orientation within the workplace can: (a) leave one open to discrimination, (b) influence personal and social development, and (c) impact performance and job satisfaction. Within the workplace context GLBT persons are faced with a unique decision: whether or not to share their sexual orientation with coworkers. Cain (1991) noted that gay individuals confront a unique quandary concerning how to present themselves to others.

As part of a stigmatized minority group GLBT persons share common concerns of workplace discrimination with other minorities; however a GLBT person's minority status may not be outwardly visible. The majority of gay men and lesbians are not clearly discernible from the majority population (Paul, 1982). A homosexual orientation is only observable to the degree that the individual chooses to reveal it (Day & Schoenrade, 1997).

Kinsey's groundbreaking work *Sexual Behavior in the Human Male* (1948) estimated that only 1 in 20 lesbians and 1 in 7 gay men are distinguishable to the general public. In this context most GLBT persons face the choice of sharing their sexual identity, commonly known as "coming out" with coworkers. As such, GLBT persons must decide and consciously manage information related to their sexual orientation with their coworkers. As noted by Ragins and Cornwell (2001), since sexual orientation is not observable gay employees can choose to avoid being a target for discrimination by

limiting with whom they share their sexual orientation. Ragins and Cornwell (2001) found a significant variation in the degree to which individuals were out at work and that most concealed their sexual orientation superficially; 11.7% reported they weren't out to any coworkers, 37% out to some coworkers, 24.6% out to most, and 26.7% out to everyone.

The risk of workplace discrimination has caused many GLBT persons to keep their sexual identity a secret (Day & Schoenrade, 1997). It is not surprising that GLBT people feel the need to hide their sexuality for fear of discrimination. Recent research has discovered that 16 to 68% of GLBT people report employment discrimination (Badgett, Lau, Sears, & Ho, 2007). Further, the same research (Badgett et al., 2007) found that many heterosexual employees disclose observing sexual orientation discrimination in the workplace. Workplace personal opinions, feelings, and religious beliefs are taken into consideration when deciding to come out as it relates to how hostile the work environment may be. Many heterosexual people argue that being gay or lesbian is a lifestyle choice and therefore should not be included in organizations' diversity initiatives. Conversely, gays and lesbians argue that being homosexual is not a choice. These beliefs often touch on religious and political issues, creating a difficult and often controversial dilemma within today's organizations.

Studies have shown that the degree to which gays and lesbians are satisfied with work is correlated to how accepting they perceive the workplace environment to be. For both the employee and employer this is an important concept. Research shows that the more open employees are, the more committed to the organization they will be, having

higher job satisfaction, perceiving greater support from top management, having lower role ambiguity, and having less conflict between work and home (Day & Schoenrade, 1997). One study used the Job Descriptive Index (JDI) to measure job satisfaction in relation to the openness of an employer and found that workplaces where gays and lesbians were open about their sexuality were positively associated with increased satisfaction (Ellis & Riggle, 1995). Button (2001) found that discrimination towards GLBT persons was negatively associated with job satisfaction and organizational commitment. Further, because work is a central aspect of one's life and is considered an indication for psychological well-being, a great deal needs to be done to empower GLBT employees (Van Den Bergh, 2003).

Little research has been done on the potential costs and benefits to an organization on employees being out in the workplace. Important questions regarding an employee's perception of organizational environment for levels of workplace "outness" as it relates to organizational performance, including productivity and production, continue to remain (Brenner, Lyons, & Fassinger, 2010). Many authors have theorized that being out in a workplace is related to an increased level of individual performance and, as a result, to an increased level of organizational performance (Powers, 1996). Brenner et al. (2010) discovered that perceptions of an environment as welcome to heterosexism can predict levels of how open GLBT persons can be in the workplace. Organizations can take a step towards decreasing workplace heterosexism while increasing the creation of behaviors that ultimately serve to improve the organization's overall success through support of GLBT employees (Brenner et al., 2010). Organizations that have created environments

supportive of GLBT employees most often have formal policies that forbid discrimination against GLBT employees, offer same-sex benefits, and welcome same-sex partners at organization functions (Ragins & Cornwell, 2001).

HRC Workplace Project and Corporate Quality Index & Minnesota

Numerous political organizations, from small grassroots movements to large national lobbying groups, have worked on behalf of the GLBT movement in an effort to achieve equality. In the area of workplace equality the Human Rights Campaign Foundation (HRC) has by far done the most to advance the rights of GLBT people. The HRC is America's largest civil rights organization working to achieve gay, lesbian, bisexual, and transgender equality (HRC, 2006). The mission of the HRC is as follows:

The Human Rights Campaign is America's largest civil rights organization working to achieve lesbian, gay, bisexual and transgender equality. By inspiring and engaging all Americans, HRC strives to end discrimination against GLBT citizens and realize a nation that achieves fundamental fairness and equality for all. HRC seeks to improve the lives of LGBT Americans by advocating for equal rights and benefits in the workplace, ensuring families are treated equally under the law and increasing public support among all Americans through innovative advocacy, education and outreach programs. HRC works to secure equal rights for LGBT individuals and families at the federal and state levels by lobbying elected officials, mobilizing grassroots supporters, educating Americans, investing strategically to elect fair-minded officials and partnering with other LGBT organizations. (HRC, 2010)

As outlined by the mission statement a core function of the HRC is to advocate for equal rights in the workplace. Much of this work falls under the HRC's Workplace Project.

Since 1995, the HRC's Workplace Project has helped thousands of employees, consumers, and investors by providing current research and onsite training on the topic of GLBT inclusive policies and practices (HRC, 2007). Specifically, the Workplace Project

of the HRC examines and evaluates organization policies and practices surrounding GLBT employees, consumers, and investors. Thanks to these efforts information on workplace benefits for GLBT is slowly becoming publicly available (Davidson & Rouse, 2004). The HRC Business Council was founded in 1997 to support the campaign's goal of creating an America where GLBT people are ensured of basic equal rights (HRC, 2007). Members of the council are corporate professionals from a wide range of industries. In their capacity on the council they provide expert advice on GLBT workplace topics based on their own experience; they are not necessarily serving as official representatives of their companies (HRC, 2007).

Corporate Equality Index

Beginning in 2002, the HRC Corporate Equality Index (CEI) began assisting major U.S. businesses by providing a reference tool for establishing and maintaining inclusive workplaces for GLBT (HRC, 2010). The CEI evaluation has been of vital significance to the GLBT community and to this inquiry. Conducted each year, the methodology of the CEI ranking is a combination of information provided by employers and HRC's review of public information. Due to the HRC's efforts a quantitative measurement of GLBT equality within America's top corporations is published each year. Specifically, *Fortune* magazine's 1,000 largest publicly traded companies and *American Lawyer* magazine's top 200 grossing firms are identified and invited to participate (HRC, 2010). A perfect score of 100 demonstrates that the organization has met all the criteria and in turn is rated as one of the "Best Places to Work for LGBT Equality" (HRC, 2009). Unlike other indexes, the CEI is not based solely on company-

reported information; instead it complements this information using independent research (Johnston & Malina, 2009). Important to note is that protecting GLBT employees from discrimination is just the first step in creating equitable work places. Additional steps such as providing same-sex benefits, advertising appropriately, and supporting the community are of significant value and imbedded within the survey. As outlined by Johnston and Malina (2009) the CEI measures an organization on its ability to implement the following:

1. Has a written nondiscrimination policy covering sexual orientation in its employee handbook or manual;
2. Has a written nondiscrimination policy covering gender identity (one's sense of being male or female) and/or expression in its employee handbook or manual;
3. Offers health insurance coverage to employees' same-sex domestic partners;
4. Officially recognizes and supports a GLBT employee resource group or council or has a firm policy that gives employee resource groups equal standing regardless of sexual orientation and gender identity;
5. Offers diversity training that includes sexual orientation and/or gender expression in the workplace;
6. Engages in respectful and appropriate marketing to the GLBT community and/or provides support through its corporate foundation to GLBT or AIDS-related organizations or events; and

7. Does not engage in corporate action that would undermine the goal of equal rights for GLBT people. (p. 606).

Table 3 outlines the criteria of the Corporate Equality Index (CEI; HRC, 2010).

Table 3

Criteria of the Corporate Equality Index (CEI)

Criteria	Points Possible
1. Nondiscrimination policy, diversity training—sexual orientation	
a) Equal employment opportunity policy includes sexual orientation	15
b) Diversity training covers sexual orientation	5
2. Nondiscrimination policy, diversity training & benefits—gender identity or expression	
a) Equal employment opportunity policy includes gender identity or expression	15
b) Gender identity diversity training offered OR supportive gender transition guidelines in place	5
c) Offers transgender-inclusive insurance coverage for at least one type of benefit. At least one: Counseling by a mental health professional; pharmacy benefits covering hormone therapy; medical visits to monitor the effects of hormonal therapy and other associated lab procedures; medically necessary surgical procedures such as a hysterectomy; or short-term disability leave for surgical procedures	5
3. Partner benefits	
a) Domestic partner health insurance	15
b) Domestic partner COBRA, dental, vision and legal dependent coverage	5
c) Other domestic partner benefits. At least three: FMLA-like leave; bereavement leave; employer-provided supplemental life insurance for a partner; relocation/travel assistance; adoption assistance; qualified joint and survivor annuity for partners; qualified preretirement survivor annuity for domestic partners; retiree healthcare benefits; or employee discounts	5
4. GLBT employee resource group/diversity council, or (half credit) Would support an LGBT employee resource group with employer resources if employees expressed interest	15
5. Engages in appropriate and respectful advertising and marketing or sponsors LGBT community events or organizations	15
6. Employer exhibits responsible behavior toward the LGBT community; does not engage in action that would undermine LGBT community (possible subtraction of 15 points)	
Total possible score	100

Note. Adopted from “Corporate Equality Index 2010,” by Human Rights Campaign Foundation, p. 5. Copyright 2009 by the Human Rights Campaign Foundation.

Data sources used to complete the CEI include: Corporate Equality Index survey, Securities and Exchange Commission filings, Internal Revenue Service 990 tax filings, case law and news accounts for allegations of discrimination, individuals of GLBT employee groups that report information to the HRC, and the HRC Foundation Workplace Project (HRC, 2010).

Each year *Fortune* magazine publishes a list of the 500 largest industrial corporations in the U.S. The corporations are ranked based on measurements such as revenues, profits, and market value. In 1991, Lotus became the first Fortune 1000 company to extend benefits to same-sex partners, followed a year later by Levi Strauss and Co. (Davidson & Rouse, 2004). Today, 85% of the Fortune 500-ranked organizations include workplace protections based on sexual orientation, compared to 51% in 2000 (HRC, State of the Workplace, 2009). Davidson and Rouse (2004) pointed out that these actions by Fortune 500 corporations are significant because in most cases it is still legal to deny employment and housing to GLBT people.

The state of Minnesota prohibits discrimination based on gender identity, sexual orientation, and being transgender in employment, housing, education, credit, and business. Table 4 outlines the Fortune 500 organizations headquartered in Minnesota, including the CEI score for 2006, 2008, 2009, and 2010, if available. It should be noted that CEI scores for 2007 are reported in 2008 due to an HRC effort to more accurately represent when the data were actually released. Organizations that do not have a CEI score chose not to participate and available data were not sufficient for the HRC to complete the ranking.

Table 4

Minnesota's 2010 Fortune 500 Organizations and CEI Rank 2006–2010

Company	Fortune 500 Rank	State Rank	2010 Revenues in Millions	CEI Score 2010	CEI Score 2009	CEI Score 2008	CEI Score 2006
3M Co.	97	5	23,123.0	100	100	85	85
Alliant Techsystems	472	20	4,807.7	65	65	NR	NR
Ameriprise	246	12	10,046.0	100	100	100	100
Best Buy	47	3	49,964.0	100	100	100	100
C. H. Robinson Worldwide	265	13	9,274.3	NR	NR	NR	NR
CHS	103	6	25,267.9	NR	NR	NR	NR
Ecolab	378	17	6,089.7	100	NR	NR	NR
General Mills	166	9	14,796.5	100	95	100	100
Hormel Foods	325	15	7,220.7	NR	NR	NR	NR
Land O'Lakes	218	10	11,146.4	53	53	53	53
Medtronic	158	8	15,817.0	100	95	85	75
Mosaic	346	16	6,759.1	NR	NR	NR	NR
Nash-Finch	449	19	4,992.0	NR	NR	NR	NR
PepsiAmericas	464	21	4,421.3	NR	NR		
St. Jude Medical	436	18	5,164.8	100	100	100	85
Supervalu	61	4	40,597.0	100	100	80	80
Target	33	2	67,390.0	NR	NR	NR	NR
Thrivent Financial for Lutherans	318	14	7,470.5	100	95	NR	NR
United Health Group	22	1	94,155.0	100	100	100	85
U.S. Bancorp	126	7	20,518.0	95	60	60	75

Note. Adopted from “The State of the Workplace,” by Luther, S., Human Rights Campaign Foundation, pp. 17–28; *Fortune*, 2010.

Summary

Over time various events have shaped the nations' perception and beliefs of equality for GLBT persons throughout society and within the workplace. During the 1960s national GLBT organizations focused on equality began to emerge. Following the Stonewall riots and throughout the 1970s, GLBT activism in the forms of protests and marches made national headlines. During the 1980s the HIV/AIDS epidemic took a considerable toll on the GLBT community and refocused the nation's attention on the health of this community. The 1990s saw unprecedented growth in local legislation protecting GLBT persons in areas of employment and housing. Further, the nation witnessed unparalleled growth in the number of top performing companies that sought to create equitable work environments. Political and societal ideals concerning GLBT persons in the workplace have changed dramatically over the past decade. That being said, the topic is still contentious.

Although great strides have been made, most GLBT persons in the workplace are not protected from discrimination and are not provided the same benefits as their heterosexual peers. Encouraged by national discourse and the understanding that treating employees equally makes good business sense, some organizations in the U.S. are becoming more equitable for GLBT employees. Daryl Herrschaft, director of the Human Rights Campaign's (HRC) Workplace Project, described "a race to the top" as organizations seek recognition for their treatment of GLBT employees (Gunther, 2006). However, changing organization policies and practices to be inclusive of GLBT people is difficult and costly to an organization. The framework of this proposal seeks to

understand the motivational factors that have led to many top performing companies to create equitable work environments for GLBT employees.

CHAPTER 3

Research Design and Methodology

Inquiry Framework

From an epistemological viewpoint, qualitative inquiry was believed to be the most appropriate approach for studying this phenomenon. As defined by Denzin and Lincoln (1994):

Qualitative research is multimethod in its focus, involving interpretive, naturalistic approaches to its subject matter. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meanings people bring to them. (p. 2)

Characteristics of qualitative research are different compared to quantitative research. Whereas quantitative research is deeply rooted in the scientific method and focused on developing mathematical models, theories, and hypothesis, qualitative inquiry aspires to gather a thorough understanding of human behavior and explanations that direct that behavior. Since the problem this study seeks to understand is rooted in human behavior and seeks explanations that direct behavior, it was concluded that the most suitable form of inquiry would utilize a qualitative approach. Further, as written by Gay and Airasian (2000), qualitative inquiry is valuable as a means to describe or answer questions about specific, localized phenomena or contexts, and the views of a group toward events, beliefs, or practices. Again, this indicates a good methodological fit for this inquiry. Last, qualitative research is remarkably suited for inquiry on a complex research topic of which little is known (Creswell, 2003). As written by Stake (2010) “There is no one way of qualitative thinking, but a grand collection of ways: It is interpretive, experience-based, situational, and personalistic.” (p. 31). The overarching

goal of qualitative research is not typically to find general social science understandings but instead to find significant insight about a particular situation (Stake, 2010).

Study Design

From a methodological perspective the *case study* is best suited for inquiry on this phenomenon. Case studies typically answers questions like “how” or “why” and are used to study contemporary phenomena in a real-life context where the researcher has little control (Yin, 2009). A type of empirical inquiry, the case study looks intensely at a program, an event, an activity, a process, or one or more individuals (Stake, 2005), drawing conclusions on the phenomena only in that specific context. From an epistemological perspective the case study is rooted in qualitative research. Case study inquiry is an accepted form of inquiry and has been used in a range of explorations, particularly in sociological studies (Tellis, 1997, July; Yin, 2009). In using case study methodology, researchers do not focus on the discovery of a generalizable truth and typically avoid cause–effect relationships; instead importance is placed on discovery and description. Case study is the ideal methodology when a holistic, comprehensive investigation is needed and can be quantitative, qualitative, or both (Yin, 1994). The case(s) are bounded by time and activity, and researchers collect detailed information using a variety of data collection procedures over a sustained period of time. Ivancevich and Gilbert (2000) wrote that:

The complexities of organizational life are usually not well captured using data tapes, historical records, or completed surveys further stating that, “Well designed case studies monitoring a diversity management technique or intervention would be invaluable in learning about and describing the impact and reaction of the workforce.” (p. 86)

Yin (2009) wrote:

In brief, the case study method allows investigators to retain the holistic and characteristics of real-life events—such as individual life cycles, small group behavior, organizational and managerial processes, neighborhood change, school performance, international relations, and the maturation of industries. (p. 4)

Case study designs can be single or multiple case inquiries. Since this inquiry seeks to understand motivational factors across multiple Fortune 500 organizations in the state of Minnesota, it was concluded that a multiple case study would yield the best insight into the selected phenomena.

As shown in Table 5, multiple types of case study inquiries have been identified by authors within the literature. Yin (1994) identified exploratory, explanatory, and descriptive. Stake (2005) included three additional types of case study: intrinsic, instrumental, and collective. Deciding which type of case study to select depends on a variety of factors. Since little to no prior research has been done on this topic an explanatory design would not be an appropriate fit. To research the motivational factors behind Minnesota's Fortune 500 organizations' commitment to equitable workplaces for GLBT persons, a collective (multiple) case study is most appropriate. Multiple authors (Stake, 1995; Yin, 2009) have agreed that collective case study is most suitable to investigate a concept for which there has been little research within the context. As Stake (2000) wrote, "Ultimately, we may be interested in a general phenomenon of a population of cases more than in the individual case, and we cannot understand a given case without knowing about the other cases" (p. 445). The collective case study is an endeavor to look into a phenomenon in a variety of settings under the expectation that the study leads to an enhanced understanding of similar settings (Stake, 1998). This

epistemic approach also aligns with a collective case study as multiple cases are required to reveal similar or contrasting results of this phenomenon (Yin, 2009). Lastly, multiple cases provide a richness of detail appropriate for the theoretical underpinnings of this study.

Table 5

Types of Qualitative Case Studies and Author Summary

Type of Case Study	Definition	Author and Year
Exploratory	Sometimes considered a prelude to social research and typically describes a phenomenon within current context and framework created ahead of time	Yin, 1994
Explanatory	Used to conducting causal investigations	Yin, 1994
Descriptive	Require a descriptive theory to be developed before starting the project	Yin, 1994
Intrinsic	When the researcher has an interest in the case and one wants a better understanding of this specific case	Stake, 1995
Instrumental	When the case is used to understand more than what is obvious to the observer, mainly to provide insight into an issue or redraw a generalization, case itself secondary interest	Stake, 1995
Collective	When a group of cases is studied, also known as multiple case inquiry, number of cases studied to investigate phenomena, population, or general description	Stake, 1995

Note. (Stake, 2005; Tellis, 1997, July; Yin, 1994).

Case study designs can include both single and multiple case inquiries (Yin, 2009). Yin also wrote that the distinction between single and multiple-case designs is significant and whether a single- or multiple-case study is going to answer the research question needs to be determined early in the research inquiry before data can be

collected. Single case studies are best suited when (a) a critical case exists that can test a well-formulated theory, (b) the case is an extreme or unique circumstance, (c) the case is believed representative or typical, or (d) a revolutionary case, where the investigator has the opportunity to observe and analyze a phenomenon formerly inaccessible to inquiry, and (e) longitudinal case, examining the same specific case at two or more different points in time (Yin, 2009). Multiple cases often consist of more than a single case and when employed, are considered a multiple-case design (Yin, 2009). Specific advantages and disadvantages exist when comparing multiple case studies to single-case designs. Findings from multiple-case studies can be viewed as more influential. The majority of multiple-case study designs are expected to be stronger and more compelling compared to single-case designs (Yin, 2009). In comparison, the use of multiple-case studies can require significant resources such as time and staff that is beyond the means of a single investigator (Yin, 2009).

The specific type of case study most appropriate for this inquiry is Stake's (1995) Collective Case Study—also known as a multiple-case study. As Yin (2009) wrote, case studies can include multiple cases that build a single set of “cross-case” conclusions. The logic behind using multiple-case study inquiry is that the multiple cases either (a) show similar results, or (b) show contrasting results (Yin, 2009). Multiple-case studies must be selected carefully so that the cases (a) express similar results (a literal replication) or (b) express contrasting results but for predicted reasons (a theoretical replication; Yin, 2009). The distinction between literal replication and theoretical replication also relates to the number of cases within the multiple-case study. As written by Yin (2009) a few cases (2

or 3) would be literal replications, whereas more cases (4 to 6) would be designed to pursue two different patterns of theoretical replications. As described by Yin (2009) single-case designs are most appropriate for inquiries that: (a) are significant in testing a well-formulated premise, (b) are an extreme or unusual case, (c) are representative of typical cases, (d) the study is a revolutionary case, or (e) the case is longitudinal in nature.

An agreed upon set of methods for qualitative case studies is not evident in the literature (Yin, 2009), as such methods are selected based on their ability to address the inquiry objectives, context of the case, and ontological and epistemological preferences of the researcher (Stake, 1995; 2005). That being said, although the literature is not extensive, it does contain specific guidelines on how to carry out case studies (Tellis, 1997, September). The principal concern of the case study is not to discover a generalizable truth; rather, it is to develop an adequate description, interpretation, and explanation of the case (Maxwell, 2005). Yin (2009) outlined five central components of a case study and their functions:

1. The case study's questions, specifically "how" and "why."
2. Theoretical propositions; pointing attention, restricting scope, suggesting potential links among phenomena.
3. Unit of analysis.
4. The logic linking the data to the propositions.
5. Criteria for interpreting the findings.

After the researcher has solved these five steps a loose theory and a blueprint related to the topic of study emerges (Yin, 1994).

As outlined by Yin (2009) case study designs must capitalize on quality through four conditions related to quality: (a) construct validity, (b) internal validity, (c) external validity, and (d) reliability. These tests are common in social science inquiries and have been summarised by numerous authors. Using construct validity, internal validity, external validity and reliability tests will increase the quality of the social research and each item merits explicit attention (Yin, 2009).

To further increase the quality of this inquiry a case study protocol was developed (Appendix A). As outlined by Yin (2009) the a case study protocol is an important means to increase the reliability of case study inquiry and can guide the researcher in conducting data collection in single cases—or single cases that build a multiple case study. A well-developed case study protocol includes the following (a) a summary of the case study, (b) field procedures, (c) inquiry questions, and (d) an outline of the anticipated case study report (Yin, 2009). It is important to recognise that the protocol is a guide and that during the inquiry this guide should be adapted as needed throughout the process. As noted by Stake (2010) there is risk that the protocol will interfere with the open and interpretive position taken by the qualitative researcher (Stake, 2010). Richards (2005) writes that there is a need to be flexible while also starting with a well-developed plan. This inquiry seeks to accomplish just that.

Construct Validity

Yin (2009) defined construct validity as identifying accurate operational measures for the idea being studied and this can be challenging in case study research. To overcome concerns of construct validity Yin (2009) outlined two steps (a) define the phenomena being studied in terms of explicit concepts and relate those to the original objectives of the inquiry, and (b) identify operational measures that match the concepts. This inquiry accomplished validity by checking the process step by step multiple times and by developing a well-defined case study protocol. As noted by Richards (2005), checking the data gathering step by step several times is an essential task. As Yin (1994) wrote, building the conceptual framework is difficult and takes significant time but is necessary for the success of the study. To build a case study framework, consideration must be given to construct validity, internal validity, external validity, and reliability (Tellis, 1997, September). Construct validity can be enhanced by using multiple sources of data (Yin, 1994). Therefore, this inquiry used data from interviews and review of company literature. Since this study was not focused on cause and effect of causal relationships, internal validity is not relevant. External validity is the extent to which findings of the inquiry can be generalized to groups or situations outside of the study (Gall et al., 2007). Generally speaking case studies do not seek to generalize outcome and inherently assume a lack of credible generalizations (Creswell, 2007). Finally, reliability is established with the development of a formal case study protocol (Tellis, 1997, September).

Internal Validity

Yin (2009) cited that internal validity is appropriate only for explanatory or causal case studies. Since this multiple (collective) case study is descriptive in nature, internal validity does not apply. Internal validity was not a concern of this inquiry as a causal relationship was not part of the study.

External Validity

Yin (2009) defined external validity as the extent to which an inquiry's results can be generalized beyond the specific case study. Since this case study inquiry seeks only to understand the specific (i.e., not intended to draw broader conclusions beyond the case), external validity also does not apply.

Reliability

Yin (2009) defined reliability as demonstrating that the operations of the study, e.g., the data collection procedures can be repeated with the same results. To increase reliability the procedures of the case must be well documented (Yin, 2009). To that end, this inquiry documented all procedures and includes a well-defined case study protocol (Appendix A). As written by Yin (2009), "Having a case study protocol is desirable under all circumstances, but it is essential if you are doing a multiple-case study" (Yin, 2009; p. 79). Richards (2005) further emphasizes that a transparent and well-documented research methodology is essential to assure that work is reliable.

The unit of analysis is a vital factor of the case study methodology and is typically a system of action rather than an individual or group (Tellis, 1997, July). Further, the unit of analysis is the actual source of the information (Yin, 1994). For this inquiry the unit of

analysis is the motivational factors, a system of action, that influence Minnesota's Fortune 500 organizations to create equitable workplaces for GLBT employees. As stated by Tellis (1997, July), case studies also focus on one or two concepts that are essential to the system being examined. The study proposed here sought to understand the concept of why Fortune 500 organizations in Minnesota have chosen to create equitable workplaces for GLBT persons; what is their motivation?

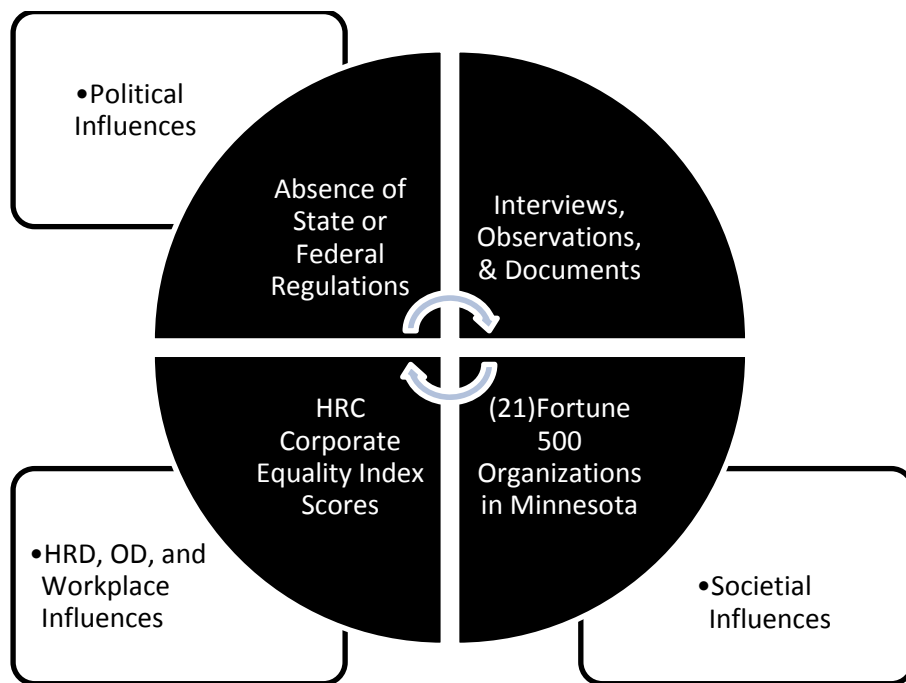


Figure 1. Diagram of case.

Case is bound by: Location in Minnesota, classification as Fortune 500 organization.

Case study evidence: Interviews and document analysis.

Note. Created by author to visualize the case.

Data Collection

Data for case study inquiry may be found in several sources and can include documentation, archival records, interviews, direct observation, participant observation,

and physical artifacts (Yin, 2009). Observation, interviewing, and examination of artifacts (including documents) are the most familiar techniques of qualitative research (Stake, 2010). The quality of these data is of the utmost importance. As Richards (2005) wrote, “The quality of the analysis is dependent on the quality of your data records and your skills for working up from them to ideas and explanations” (p. 67). For this inquiry, interviews and document analysis are the two types of evidence collected. Table 6 outlines the sources and strengths and weaknesses of these two kinds of evidence.

Table 6

Strengths and Weaknesses

Source of Evidence	Strengths	Weaknesses
Documentation	• Stable, can be viewed repeatedly • Unobtrusive—not created as a result of the case study • Exact—contains exact names, references, and details of an event • Broad coverage—long span of time, many events, and many settings	• Retrievalability—can be difficult to find • Biased selectivity, if collection is incomplete • Reporting bias—reflects (unknown) bias of author • Access—may be deliberately withheld
Interviews	• Targeted—focuses directly on case study topics • Insightful—provides perceived causal inferences and explanations	• Bias due to poorly articulated questions • Response bias • Inaccuracies due to poor recall • Reflexivity—interviewee gives what interviewer wants to hear

Note. (Yin, 2009).

Yin (2009) noted that documents must be cautiously used and should not be taken as literal recordings of events that have taken place and that the most significant use of documents is to corroborate and add to evidence from other sources. Further, Yin (2009)

outlined specific uses for documents including verifying accurate spellings and titles of names of organizations, and providing specific details to corroborate information from other sources. In contrast, Yin (2009) also cited that many researchers are critical on the overdependency on documents in case study research (Yin, 2009). This inquiry used documents in a way that supported the research without becoming overly dependent. To accomplish this I outlined specific documents to be reviewed and the purpose behind reviewing them. As an example, Equal Opportunity and Affirmative Action (EOAA) statements were included to verify that each organization protected GLBT persons in their work environment.

A primary and significant source of case study information is the interview (Yin, 2009). Interviews can be directed conversations, often referred to as semistructured interviews, rather than structured queries. Yin (2009) suggested conducting interviews on two levels: satisfying the requirements of your inquiry (level 2 questions; see Appendix B) while at the same time putting forth nonthreatening questions during the open-ended interview (level 1 questions). For this inquiry a semistructured, in-depth interview was used. As Yin wrote, “Well informed interviewees can provide important insight into such affairs or events” (referencing human affairs or behavioral events). Interviewees’ responses can be subject to problems of bias, poor recall, and poor or inaccurate articulation (Yin, 2009). Interviews are conducted in qualitative research for a number of reasons. For the qualitative researcher, perhaps the most significant include obtaining unique data from the person being interviewed, gathering an aggregation of information

from numerous persons, and finding out more about a phenomenon that the researchers were unable to observe themselves (Stake, 2010).

Yin (1994) wrote that cases should reflect the characteristics and problems identified in the underlying theoretical assumptions. As noted in Table 4, Minnesota has 21 Fortune 500 organizations. Of these 21 organizations, 14 have participated in the CEI and have corresponding scores. Participant organizations were identified on the basis of: (a) having a CEI score of 100 or above, (b) being located in Minnesota, and (c) demonstrating (if possible) an increase in scores over the past 4 years; CEI indexes of 2006, 2008, 2009, and 2010. Using these criteria (see Table 4) 11 organizations were identified: 3M, Ameriprise Financial, Best Buy, General Mills, Medtronic, PepsiAmericas, Supervalu, Target, United Health Group, U.S. Bancorp, and Xcel Energy. Each of these organizations was asked to participate in the study. The remaining Fortune 500 organizations in Minnesota: C. H. Robinson Worldwide, CHS, Mosaic, Nash-Finch, St. Jude Medical, and Thrivent Financial for Lutherans are not included within this research as they do not participate in the CEI. As outlined by Yin (2009) the typical criteria, for non-case study research, concerning sample size is irrelevant—instead the choice should reflect the number of case replications needed or wanted for the study. For this inquiry, three cases are appropriate. As written by Richards (2005) “. . . size of data records is not, alone, a relevant criterion for a good outcome” (p. 19). He further stated that a sample is large enough when enough data have been gathered to answer the question. A key to understanding when enough data have been gathered is saturation. As

defined by Richards (2005), saturation occurs when the researcher arrives at a point where nothing new is coming up.

To request access I sent a request letter outlining my research (Appendix C) to a senior HRD professional at each of the 11 primary organizations. To identify these individuals I used Hoovers Company Profiles, a research database accessible from the University of Minnesota library. Within the Hoovers database one can easily search and find the names, job titles, and mailing addresses for an organization's senior leadership, often including email. My preliminary research found contact information for senior HRD professionals for each of the 11 primary companies. Specifically, the data I found include contact information for people with titles such as: EVP Human Resources, SVP Human Resources, and Chief Human Resources Officer. To help assure that my request would be read and responded to, I used my personal network of HRD professionals. I had already built a professional relationship with many of the people I wished to interview. At the companies where I did not personally know the people whom I wished to interview, I knew an individual on their staff who could advocate for the research request on my behalf. After sending the initial letter I followed up once with a telephone call, if necessary. Since the companies chosen for this inquiry are public companies, data needed beyond the interviews were public information and could be found in numerous databases. This information includes industry classification, business description, current news, and annual reports.

Participants

This inquiry required a series of interviews and exhaustive document review to collect data. Interviews were conducted across 4 organizations and included HRD professionals responsible for completing HRC's Corporate Equality Index and employees who were members of the organization's GLBT employee resource groups. A total of 6 interviews were conducted (typically 1 HRD staff and 1 ERG member at each of the 4 organizations)—see Table 7. There are two reasons organizations that met the profile for this research were not included in the interviews. One, due to organizational resistance the company declined to participate. Or, the organization ignored several requests to participate altogether. The means of obtaining people and permission of individuals follows:

1. The researcher identified lead HRD professionals at the companies previously identified by using Hoovers Company Profiles and requested participation by sending an email (see Appendix C).
2. After receiving a response the researcher scheduled a time to complete the interview and provided the respondent with the informed consent form (see Appendix F).
3. At the beginning of the scheduled interview the researcher confirmed that the interviewee had read the consent form and understood the research. Further, the researcher answered any additional questions and then signed the consent form.

4. As outlined in the interview protocol, the interview included the request for a contact, preferably a leader, of the GLBT employee resource group from that organization.
5. Persons identified in number 4 were sent the interview request letter (see Appendix C) and then followed steps 1 through 3 above.

This process followed guidelines outlined in section 8 of the Institutional Review Board (IRB) of the University of Minnesota application (see Appendix E). Although the IRB deemed the research outside of its purview (see Appendix G), it allowed me to move forward as outlined. That being said, I chose to follow all University of Minnesota IRB guidelines as they are considered best practices for conducting social science research.

Table 7

Participant Demographics (n=6)

Characteristic	Number of participants
Female	5
Male	1
Years of employment at organization	
< 1 year	0
2–5 years	2
6–9 years	3
> 10 years	1
Full time employment	6
Company A	1 (1 HRD staff member)
Company B	2 (1 HRD staff and 1 ERG member)
Company C	1 (1 HRD staff member)
Company D	1 (1 ERG member)

Instrumentation

Interviews were conducted with organization leaders instrumental in developing the GLBT inclusive policies of the organization and employees who are long-standing members of the organization's GLBT groups. Senior HRD leaders were selected as they are the most likely to provide reliable information regarding the motivational factors behind creating GLBT equitable work environments. Additionally, employees who are members of the organization's GLBT group are well suited to answer interview questions exploring the subquestion: from an employee's perspective, what are the benefits to the company for creating an equitable work environment for GLBT persons? As Maxwell

(2005) wrote, it will be important to distinguish between the research questions of the study, what the research seeks to understand, and the interview questions that generate the data needed to understand these questions. Each interview was anticipated to last 1–1½ hours as can be seen on the interview guide (Appendix B). Open-ended, semistructured interview questions were used to extract each participant's insight (Appendix B).

The specific research methods of this case study and the protocol included in-depth interviews and a review of existing organizational documentation of at least 3 Minnesota Fortune 500 organizations that score well on the Corporate Equality Index (CEI). As outlined by Yin (1994), interviews and documentation used within this study are acceptable sources of evidence. Additional sources of evidence appropriate for case study inquiry, but not used in this study, include physical artifacts, observation, participant observation, and archival records (Yin, 1994). As suggested by Creswell (2003) case study diagrams can help readers to visualize the components of the case. Figure 1 outlines the visual diagram for the case being studied in this inquiry.

Case study is well known as a triangulated research strategy (Stake, 1995; Tellis, 1997, July). In case studies triangulation can be accomplished in multiple ways. This study has been triangulated using interviews and documentation. A significant strength of case study data collection is the ability to include several different sources of evidence that can frequently exceed the sources found through other research methods (Yin, 2009). In addition, it is becoming ever more common for qualitative researchers to use resources other than people. Taken together, this significant strength allows for straightforward

triangulation of the data. As such, the research findings are likely to be more convincing and true if they are based on multiple sources of data (Yin, 2009). Patton (2002) recommended four kinds of triangulations: (a) of data sources—data triangulation, (b) among different evaluators—investigator triangulation, (c) of perspectives to the same data set—theory triangulation, and (d) of methods—methodological triangulation. This study uses data triangulation, i.e., multiple data sources.

To reduce bias and strengthen the reliability of this inquiry ‘bracketing’ was employed. As described by Gearing (2008), “bracketing is a scientific process where a researcher suspends or holds in abeyance his or her presuppositions, biases, assumptions, theories, or previous experience to see and describe the essence of a specific phenomenon” (p. 63). In other words, bracketing allows the researcher to set aside biases by sharing them in a specific way throughout the research inquiry. In much of qualitative research, bracketing is completed in three ways. Gearing (2004) succinctly stated that the three phases of bracketing include (a) abstract formulation, (b) research praxis, and (c) reintegration. First, the author fully describes the foundation of the inquiry. Gearing (2004) suggested this can be done simply by acknowledging the researcher’s philosophical origins and methodology. Second, the author recognizes and self-discloses any assumptions about the phenomena. Third, beliefs about phenomenology itself are shared. The process of bracketing enables researchers to better understand themselves and the case being studied while recognizing that the two are distinctly separate. Within my dissertation bracketing was an ongoing process of self-disclosure, including foundations of the inquiry, personal assumptions, and beliefs about phenomenology.

Data Analysis

The inquiry was supported using NVivo 9, a qualitative research software program. Tools such as NVivo have become diverse, functional, and more common over the past decade (Yin, 2009). NVivo was developed by researchers and intended to support researchers in the diverse ways in which they work with data (Bazeley, 2007). The use of the NVivo software does not supersede the ways in which one learns from working with the data; instead it is used to increase the learning by allowing the researcher to be more efficient. As suggested by Bazeley (2007), NVivo supports qualitative data analysis in five primary ways: (a) manages data, (b) manages ideas, (c) queries data, (d) graphically models, and (e) reports from the data. A common misperception is that a computer increases the rigor of the analysis process—this is incorrect. Using a computer, or in this case a software program and computer, simply helps the researcher be more methodical, thorough, and attentive (Bazeley, 2007). Also important to note is that the software does not prescribe a method of data analysis and that all responsibility for this is still the researcher's.

The analysis of evidence is one of the least developed and most difficult aspects of conducting case study inquiry (Yin, 1994) and various viewpoints relating to this phase exist (Tellis, 1997, September). Therefore, it was of vital importance to develop an explicit analytical strategy. Miles and Huberman (1994) recommended three concurrent steps for data analysis: data reduction, data display, and conclusive drawing and verification. As outlined earlier, data were provided from three sources: (a) interviews including a senior HRD professional and a long-standing member of the organization's

employee advocate group, (b) documents created and published by the organization, and (c) news stories and research written about the organization from third parties. Once an organization agreed to participate, two in-depth interviews and a review of company information and literature began. These were the early stages of the study and data preparation.

Data Reduction

To convert the raw data into a valid structure for this inquiry, i.e., data reduction, an organized approach was implemented that involved preliminary sorting and coding during the transcription process. As outlined by Marshal and Rossman (2006) initial sorting and coding makes the data more accessible for subsequent, and deeper, examination and interpretation. Coding is a system of data reduction that is based on symbols or numbers (Richards, 2005). Further, three kinds of coding exist in qualitative research: descriptive, topic, and analytical (Richards, 2005). A code key of pre-formulated codes (Appendix D) was developed based on the original research questions (see Appendix B) and rooted in the initiation literature review of the dissertation. During the transcription process memos were taken and placed in NVivo for further analysis. Richards (2005) recommends visiting the data several times during the research because each time you may see something differently. Knowing this, the data were transcribed, then read and reflected upon numerous times to allow patterns to emerge, and in turn, these patterns were coded using the preformulated codes. Although it is expected that the emerging themes will generally fall within the categories of the preformulated codes it is

important be open to unexpected themes that may emerge and include these themes within the study.

Data display. To display and organize data effectively, a visual format consisting of tables and other designs was implemented. NVivo 9 was used to assist in pulling together and visually displaying the data. A central function of NVivo is the ability to cluster and arrange documents to observe relationships and create visual models based upon these relationships. This feature was of significant value when analyzing company literature. Tables showing preformulated codes, code categories, and emerging themes depicted the research. These visual depictions guided the in-depth literature review, Chapter 6 of this dissertation, and follow-up data analysis.

Conclusive drawings and verification. After developing an in-depth review of each individual case, comparisons were made across the multiple organizations (cross case) included in the study. Using ‘within case’ and ‘cross case’ analysis provided a fuller, more robust interpretation and enhanced the overall extent of the analysis (Yin, 2003). By carrying out an established method of coding data, themes evolved that were examined and tied to the literature in the research summery; Chapter 5. The thorough literature review linked to themes found from this inquiry supported and verified the conclusion.

Document Review

The document review focused on the organizational mission, Equal Employment and Opportunity (EEO), and diversity statements from each of the selected organizations. Since Fortune 500 organizations are some of the most financially successful in the world,

they usually have accessible websites that include this information (Cunningham, Cornwell, & Coote, 2009; Williams, 2008). Organizations selected to participate in this research all had extensive presence on the Internet. From organizational websites the mission, Equal Employment and Opportunity statement (EEO statement), and diversity philosophy could easily be found in the public domain. Information that was not directly related to the inquiry was not gathered. After textual data for the mission, EEO, and diversity statements had been identified for each of the 10 organizations, it was stored and analyzed using NVivo 9.

The mission, EEO statement, and diversity philosophy were purposely chosen for review because these statements capture companies' unique and lasting aspirations, purposes, and practices. As noted in the literature, mission statements may be written to portray a company's objectives and values to be consistent with those of their stakeholders and to disclose organizational distinctiveness (Peyrefitte & David, 2006). Mission statements are generally accepted as necessary for an organization in order to form its identity, purpose, and direction (Leuthesser & Kholi, 1997). Further, mission statements still serve as common corporate reporting tools (Williams, 2008). In this sense, a review of these documents can provide significant insight into the strategic planning of an organization to create equality in the workplace for GLBT employees, especially since the focus is on organizations that have demonstrated equality by scoring well on the Corporate Equality Index (CEI).

It is often argued that organizational mission statements articulate a shared purpose which is a prerequisite first step to broader organizational success and necessary

for the strategic planning process (Morphew & Hartley, 2006). A mission statement communicates two things about an organization: who it is and what it does (Williams, 2008). Web Finance, Inc. (2010) defined a mission statement as being:

A written declaration of an organization's core purpose and focus that normally remains unchanged over time. Properly crafted mission statements (a) serve as filters to separate what is important from what is not, (b) clearly state which markets will be served and how, and (c) communicate a sense of intended direction to the entire organization.

In addition, mission statements can be an important means for organizations to demonstrate their awareness and responsiveness to constituents' concerns (Peyrefitte & David, 2006) and for conveying where a company is headed and how it plans to get there (Williams, 2008).

Last, there is significant support in the literature for the belief that higher performing firms discuss and disseminate philosophies and target markets, strategies, concern for public image, and concern for employees more often when compared to lower performing firms (Williams, 2008). Authors also noted that 'mission statement' is often equal to numerous other metaphors that may refer to elements typically found in a mission statement (Leuthesser & Kholi, 1997). These may include elements of a diversity philosophy or supporting pieces of an Equal Employment and Opportunity statement. It is under this premise that mission statements and related company literature have been reviewed in this study to determine if, and in what ways, the motivation for creating equality in the workplace has been expressed.

Analysis of the selected documents was supported by NVivo 9; a qualitative research software program. Using NVivo I was able to store, code, and compile themes from the documents. First documents were taken from the organization's website and placed in a word. Second, these word documents were imported into NVivo where the third step, coding, could take place. To code the documents I read each one several times to identify common themes. Once these themes emerged I was able to go return to the statements and using the NVivo software code for the themes outlined in Table 8.

After a comprehensive analysis of the collected documents (mission statements, EEO statements, and diversity statements) was complete, several elements surfaced. These elements supported the themes identified in Table 10 which were either premeditated or emerged during analysis.

Table 8

Most Common Elements among Reviewed Documents

Mission Statement	EEO Statement	Diversity Statement
Commitment to diversity (3)	Commitment to diversity (7)	Commitment to diversity (10)
	Sexual Orientation protection (6)	Sexual Orientation protection (3)
Commitment to Community (6)	Commitment to Community (1)	Commitment to Community (4)
Reference to Core Business (8)		
	Federal or State Law (5)	Gender Identity (1)
	Gender Identity (5)	Gender Expression (1)
	Gender Expression (4)	Definition of Diversity and Inclusion (5)
	Value reference (1)	Supplier or customer diversity (5)
		Changing Demographics (1)

Note. Themes that emerged after document review are shaded.

Data Analysis—Interviews

All recorded interview data were transcribed and placed in NVivo 9. The data were collected, then thematically examined several times, assisted by NVivo 9. Through multiple examinations, preassigned codes (see Appendix D) were placed on data and as themes emerged, additional codes were developed and placed. After coding was completed, patterns and relationships between the codes were expanded upon and clarified, ultimately leading to the development of overall themes. Both codes and themes were continually reviewed in relation to the research questions.

These interviews were recorded and were conducted at the University of Minnesota campus or at the interviewee's office at prearranged, mutually agreed upon times. The interviews generally followed the interview guide (see Appendix B) and the

opportunity was provided to participants to ask their own questions. Descriptions of the data collected from participant interviews with supporting quotations to illustrate themes and subthemes are incorporated within these findings.

It was anticipated that each interview would last one hour in length. Of the six interviews four of them had a total length of 40 to 50 minutes, one less than 30, and the remaining 70 minutes. Although the same questions and process were used for each interview the length varied dependent upon how long the interviewee took to answer the questions. From these recorded interviews, it averaged 5 to 6 hours of transcription work per one hour interview. Since I was seeking the content of the interview participants' answers and not their reaction to their answers I did not focus on transcribing nonverbal cues in the transcription process.

Rigor

Methodological rigor was established using multiple means as outlined in Chapter 3, including data reduction, data display, and conclusive drawing. To help increase rigor I kept a detailed account in a research journal which included ongoing feelings, evolving ideas, questions, and personal insights. As noted in Chapter 3, bracketing was also used so that I could set aside my own personal hunches and move forward as unbiased as possible with the inquiry.

Ethical Considerations

As written by the National Research Council (2002), ethical concerns involving the protection of human participants in the research have real impact on the methodology, data collection, and, consequently, the results that can be generated from research. Within

the social sciences, ethics for scholarly and professional associations are the conventional format for moral principles (Christians, 2005). By the 1980s each of the major academic associations had written its own code of ethics with overlapping emphasis on four guidelines including: (a) informed consent, (b) deception, (c) privacy and confidentiality, and (d) accuracy (Christians, 2005). This study followed all these ethical considerations and all Institutional Review Board (IRB) requirements. Specifically, this study: (a) gained informed consent from all participants, (b) research techniques did not employ deception in any way, (c) the privacy of participants was protected by coding data and keeping data secure, and (d) research did not include vulnerable populations. As written by Martin and Meezan (2003),

GLBT populations are marginalized in American society, and their members are at risk for experiencing violence, discrimination, and exploitation in a variety of contexts. Because research involving GLBT populations always occurs within this context, there may be greater potential for exploitation and harm to participants . . . (p. 183).

Recognizing these potential consequences, every step was taken to protect participants and this GLBT community at large, specifically, as outlined by this study's application to University of Minnesota's Institutional Review Board (IRB; see Appendix E).

Strengths and Weakness

Advantages of conducting a case study are abundant. As Yin (2009) wrote, "the case study's unique strength is its ability to deal with a full variety of evidence—documents, artifacts, interviews, and observations—beyond what might be available in a conventional historical study" (p. 11). The case study methodology allows flexibility in data collection, as the researcher is free to collect data from interviews, observations,

company literature, and files (Ivancevich & Gilbert, 2000). Data collection does not need to be embedded in one type of process and gives the researcher the ability to choose from multiple options. Second, the research questions begin as guides but are tailored as the research progresses (Yin, 1994). Questions are adapted as new insights are discovered, giving the researcher an opportunity to change questions without violating the procedures of the research. Third, the partnership between the practitioner and researcher is a strength. By collaborating, researchers and HRD practitioners will be able to use the research project to the benefit of the organization. As suggested by Ivancevich and Gilbert (2000), the majority of academic researchers do not understand how practitioners conceptualize or use research, or have little comprehension for the realities practitioners deal with while carrying out their work. The approach outlined in this study overcomes this issue.

Although a case study was best suited for this research inquiry, the approach does have weaknesses that must be acknowledged. Table 9 outlines common criticisms of the case study inquiry and recommends methods to overcome these criticisms. As Tellis (1997, September) reported, the issue of generalization has occurred frequently in the literature and is a repeated criticism of case study research. To counter the generalization criticism, it is important to understand the difference between analytical and statistical generalization (Yin, 1994).

Table 9

Case Study Criticisms and Methods to Overcome

Risk/Criticism	Correcting Action
Lack of rigor	Create a well-defined methodology and structure
Lack of systematic handling of data	Researcher reports all evidence
Generalization not obtainable	Be clear that the objective of inquiry is not to generalize theoretical propositions or statistical research; instead the goal is deeper understanding of the phenomenon in its own context
Significant time expended to conduct inquiry	Place time limits on study
End up with unreadable documents	Researchers develop writing formula
Hypothesis can create a blinder preventing the researcher from seeing the phenomena fully	Using guiding questions that are fluid and adaptable as the research progresses
Allowing a variance ideology to supersede understanding the process being studied	Avoid framing research questions in a way that focuses on differences and their explanation

Note. Adapted from Maxwell, 2005; Yin, 1994; Yin, 2009.

In addition to the aforementioned weaknesses other specific weaknesses of this study must be recognized. These weaknesses are associated with other methods of inquiry in addition to case study. First, a potential risk to this study is the danger of what qualitative researchers call a Type III error—answering the wrong question (Maxwell, 2005). Second, there is a risk of smuggling unexamined assumptions that impact the results (Maxwell, 2005). And third, the semistructured interview questions might elicit responses in such a way that influences categories (Lien, Hung, & McLean, 2007).

Limitations

Three noteworthy limitations to this inquiry are discussed in this section: (a) challenges with case study methodology, (b) flawed or biased data, and (c) researcher bias.

Case Study Methodology

Case study methodology does not allow findings to be drawn or generalized beyond the actual case or phenomena studied. As noted by Yin (2009) . . . case studies, like experiments, are generalizable to theoretical propositions and not to populations or universes. In this sense, the case study, like the experiment, does not represent a “sample,” and in doing a case study, your goal will be to expand and generalize theories (analytic generalization) and not to enumerate frequencies (statistical generalization; p. 15).

Therefore, the results of this inquiry are limited only to an in-depth understanding of the organizations found within the study. External validity is the extent to which findings of the inquiry can be generalized to groups or situations outside of the study (Gall et al., 2007). Generally speaking case studies do not seek a generalizable outcome and inherently assume a lack of generalizability (Creswell, 2007). This research inquiry is also bound by design, sample size, and framework, i.e., Fortune 500 organizations in Minnesota that score 100% on the HRC’s Corporate Equality Index (CEI). While these organizations were most desirable for the study, it is not viable to make generalizations to organizations not ranked in the Fortune 500.

Bias or Flawed Data

A primary means of data collection for this study was through interviews. There is some risk that the interviewees may not have a sound understanding concerning motivations behind their employing organization to create GLBT-friendly work environments. Therefore, there is inherent risk in using data from interviews. A second way that data could be flawed is that the sample set focused on 3 specific organizations and may not represent the full range of industries found in Minnesota's Fortune 500 organizations. A third and final limitation due to data in this study is that it is based solely on available data published by each organization for a distinct purpose different from that of this study. It should be recognized that secondary data cannot always be considered accurate or current (Cunningham et al., 2009). Further, using statements found online means that these were written for public consumption which may be a reflection of where a company wants to be, not where it actually is.

Researcher Bias

As outlined earlier, bracketing is used throughout this study in an effort to reduce researcher bias and strengthen reliability. That being said, it is important to note that researcher bias is a limitation of this study.

Bracketing occurs in three ways (a) abstract formulation, (b) research praxis, and (c) reintegration. Abstract formulation, the full description of the underlying theory, is discussed in full within this chapter—*Methodology*. The element discussed here is part (b)—research praxis, where the author recognizes and self-discloses assumptions about

the phenomena. A valuable way to separate out, or bracket, prior knowledge and assumptions is to document them (Richards, 2005). In this spirit, I share the following.

First, it is imperative that I share my personal interest in these phenomena. As an openly gay man I have a deep and personal interest in this topic. As a member of the GLBT community I am personally involved and passionate about equality for GLBT people in the workplace. My motivation for completing this line of inquiry is intrinsic and personal. Specifically, it is my hope that deeper understanding of the positive benefits to creating equitable GLBT work environments will someday lead to better work places for GLBT people.

It should also be recognized that I'm a young scholar and that I'm just beginning my research journey. My understanding is limited by my age, degree, and work experience. A more seasoned researcher may have insight beyond my current means. That being said, my passion for studying the workplace has well equipped me for dedication to complete a study of this length and magnitude. It is my personal take that this passion and endurance makes up for experience.

There are three minor challenges for me to overcome to complete this research with minimal bias. First, I have endeavored to create a frame of thinking that organizations that do not score well on the CEI are not inherently flawed and ones that score 100% are not inherently exceptional. Second, as an openly gay man, I must think beyond the "G" of the GLBT acronym to lesbian, bisexual, and transgender. Specifically, I do not know what it is like to be lesbian, bisexual, or transgender and therefore must avoid assumptions or generalizations of people who identify in this manner. Last, I must

recognize that I'm extremely passionate concerning the development of GLBT-inclusive organizational policies and practices. As a researcher I must identify and admit this passion and endeavor to draw conclusions based on the research data and not my own dispositions.

It is also important to mention that the conclusions drawn within this study are solely those of the author. These conclusions are not to be accepted as the only possible interpretation of the data, but rather as an interpretive understanding based on thoughtful study of the data collected, documents and interviews, reviewed over several months.

Researcher's Role

During this inquiry, I was a full-time doctoral student in Organizational Leadership and Policy Development (OLPD) with a focus on HRD. In addition, during the research project I was employed as full-time staff at the University of Minnesota–Carlson School of Management. During my doctoral studies I was both a full-time and part-time student. In my work at the Carlson School I was able to build a network of peer HRD professionals who helped me negotiate the large organizations that are part of this study. Although this network was important, it only assisted in reaching the individuals whom I needed to interview to complete the research inquiry. My research agenda, data collection, range and depth of my doctoral committee, and propensity to minimize bias provided me a sound footing for this inquiry.

Summary

This is a multiple case study aimed at examining why Fortune 500 organizations in Minnesota have chosen to spend significant HRD resources to create equitable work environments for GLBT people.

To complete this line of inquiry, semistructured interviews were conducted with 6 individuals from 3 of Minnesota's Fortune 500 companies. These interviews followed a well-developed case protocol to increase the quality of the data gathered. To complement the interviews, and to triangulate the data, a review of organization documents was also conducted. Companies were identified using several criteria including location in Minnesota, ranked by *Fortune* magazine as one of the country's largest 500 public companies, and by the company's score on the Corporate Equality Index. To reduce researcher bias and strengthen reliability, bracketing was used by: (a) describing the foundation of the inquiry, (b) as the author I disclosed my assumptions about the phenomena, and (c) my beliefs about the phenomenology have been shared.

The inquiry was supported by using NVivo 9 and analyzed in several ways. Data analysis included data reduction, data display, which allowed conclusive drawings, and verification.

CHAPTER 4

Findings

In this chapter the findings are presented and analyzed. The focus of this inquiry sought to understand why Fortune 500 organizations in Minnesota have been motivated to spend significant HRD resources to create equitable work environments for GLBT people. To explore this phenomenon the following subquestions guided the inquiry: (a) do organizations find a return on investment (ROI) for providing an inclusive work environment for GLBT employees? and (b) from an employee's perspective, what are the benefits to the organization for being GLBT-inclusive? The following are the five major themes and related subthemes that emerged from this inquiry—see Table 10.

Table 10

Major Themes and Subthemes of the Inquiry

Major Themes	Subtheme
Positive Return on Investment (ROI)	A. Increased productivity, job satisfaction, employee retention B. Corporate Social Responsibility (CSR)
Element of a Broader Diversity Initiative	A. Sexual orientation and/or gender identity included within diversity and inclusion initiatives B. Company cites importance of supplier or customer diversity*
Internal organizational pressure	A. Grass roots initiative B. Employee Resource Group (ERG) C. Senior leadership
Parity with other Minnesota companies*	A. Aspirational company* B. Competition for skilled employees
Fortuitous chance	

* Indicates a theme that emerged during analysis

As outlined in the original prospectus, this research endeavor included a document review, research journal, and interviews, which together were triangulated to develop the aforementioned themes—see Table 10. The document review included mission statements, EEO statements, and diversity and inclusion statements for the 10 Fortune 500 organizations in Minnesota that score 100% on the Corporate Equality Index (CEI). A research journal, created in NVivo 9, was consistently and extensively used as a way to contribute to the data and rigor of the study. A significant source of data was also collected from 6 semistructured interviews, across 3 of these organizations.

Data analysis was conducted using NVivo 9 to sort, code, and organize the data. Following the methodology outlined in Chapter 3, the interview and document review data were placed in NVivo 9 software, reviewed thoroughly, coded using predetermined themes, and coded a second time with emergent themes; completing data reduction. To complete data display, tables and significant quotations from the interviews have been included in the discussion. These visual depictions are instrumental in communicating large amounts of qualitative data and helping to guide the in-depth literature review.

The final hierarchy of findings included five major themes and five significant supporting themes—see Table 11. Each of the themes is described and supplemented with quotes from the interviews and described in detail.

Table 11

Major Themes, With Number of Participants that Contributed to Each

Major or supporting theme	Theme Supported in Interviews By:	
	Number of Sources	Total References
Positive return on investment (ROI)	5	12
Increased productivity, job satisfaction, employee retention	4	14
Corporate social responsibility (CSR)	5	11
Element of a broader diversity initiative	5	18
Internal organizational pressure	4	8
Grass roots initiative	5	11
Employee resource group (ERG)	5	11
Request by senior leadership	4	5
Parity with other Minnesota companies	4	11
Aspirational companies	2	4
Competition for skilled employees	5	10
Fortuitous chance	3	5

The subsequent discussion describes in detail the themes and subthemes shown in Table 10. The discussion begins with the overall themes supported by the triangulated data (interviews, document review, and research journal). Then, specific examinations providing additional insight on a select number of data categories are discussed (e.g., insights from interviews, mission statements, etc.).

Theme 1: Positive Return on Investment (ROI)

This central finding is that companies found a return on investment (ROI) that positively impacted the organizations' bottom line. The two subthemes identified within this theme are: (a) increased productivity, job satisfaction, employee retention, and (b) the perspective that it directly related to the company's core business function. Overall, participant interviews revealed critical factors that support this theme. Participants described ways in which creating a GLBT inclusive work environment helped retain employees and helped to create a favorable recruiting environment for prospective employees. In addition, participants shared ways in which they believe their company's inclusive work environment increased productivity by creating a climate where all employees felt they could bring their whole selves to work. As one participant summarized the return on investment,

Diversity and inclusion is a driver of business. It drives innovation, it drives . . . an inclusive work environment, it drives engagement, within our business. The more engagement you have, the more innovation you have, the better your business does. So I think the decision [to be GLBT inclusive] is to be better for business. And you know by believing and knowing it is a driver of business and that it provides value on the business end. It is an easy decision to make, to say we are going to be inclusive of everybody. So I think the decision really came from the fact that [diversity] is what drives our business. I think it is hard as a business . . . to make a decision if we can't really relate it to the value of business, but we can. We know having a diverse population means better innovation. We know that having higher employee engagement means that we are getting more return on our value from every employee and we can't do those things unless we are being inclusive.

A second interview participant characterized the positive return on investment this way,

The motivation is this idea of getting that diverse thought . . .you know when it comes to, you know, where we are a for-profit company, we have

diverse stakeholders, how can we drive business, how can we generate revenues, and the strong belief is that you need diversity in thought and if that requires diversity in employees. If we get the same type of employees with the same ethnic background, the same religious experiences, the same, you know, born and raised in Minnesota, you kind of run the risk of that group thought. You don't have the opportunity to challenge yourself to think differently. But when you start bringing people in and partnering with people across the globe, especially when you want to be an international leader, ah, you start getting divergent ideas and experiences. You start thinking, you know, out of the box, and, um, you start identifying areas where you can create additional revenue streams. But more importantly you create an environment where your employees want to continue working here if they can bring their full self to work they are going to want to stay here. So you are not losing, um, talent because you know they're uncomfortable talking about their partners or their transitions. And you keep that top talent with those diverse ideas and experiences that are just a different perspective when it comes to whether you are generating revenues or not, maybe you just come up with a new way to improve a process or create a new product that would help, you know, Company D and the community at large, with, um, longer health. Um, so that is kind of high level, the overall drive—certainly there is that business piece but also retaining top talent.

Increased productivity, job satisfaction, employee retention. This subtheme is characterized by participants' comments or documents which supported the premise that creating a GLBT inclusive workplace increases company productivity, increases employee job satisfaction, or increases employee retention. All of these are significant measures that can impact a company's bottom line.

Employee retention was a prevalent theme cited within the participant interviews. One participant, in particular, expressed it well, "[Our company is] motivated number 1, primarily by parity with other companies. We don't want to be losing people to other [Minnesota companies] in town. You don't need to lose them across town."

Some of the participants revealed that the score on the CEI was an indicator as to whether or not they or prospective employees would seek employment there. This theme

was anticipated because the Corporate Equality Index was developed, in part, to be a tool for prospective employees to measure how amicable the work environment is for GLBT employees. Recognizing this, it is not surprising that this theme emerged as robustly as it did. Participant comments across multiple interviews and organizations included,

[GLBT employees] said [they] use [the CEI score] as an index for consumer buying decisions and for whether they want to be an employee at that company.

You know we have seen greater retention. We have seen greater engagement. We have seen, you know, happier employees because they know we are offering the benefit [transgender health benefits] whether they are going to use it or not. You know we are being supportive whether they need that support or not.

In the recession we had people that were laid off, of course. I've had people tell me that [they were] at the point in [their] life where [they] can afford to not work for a while and that [they] will only seek employment at companies that score 100%—that's it, I had a couple people tell me that. He [and others] said that he would only look at 100% rated companies.

Getting the best people into our organization and retaining that talent, building [company] leadership, and building strong leaders, [by doing this] we will have innovative products and better market position so I think that's why [we value creating a GLBT inclusive work environment] and I think that is why for a lot of companies.

I think being a competitive employer absolutely [in reference to recruiting talent] . . . especially with the GLBT community I think about when I was looking for a job I immediately [sought] where do they rank on the index? You know, and I remember when I first started, when I was on [position x] team here working on behalf of Company D. I even looked them up then and I wasn't even looking for a job here. I wanted to know how are you at meeting the inclusive standards and that was in back in 2006. I want to say they ranked 94% and I was disappointed. I was like, where is my 6%?

This interview participant further elaborated on the recruitment and retention theme relating it to the current legislative movement in Minnesota to constitutionally define marriage to a man and a women, adding,

. . . also just legislation in front of Minnesota Legislature now, the amendment, there is a strong concern as to [the ability for our company] to attract top talent within a state that creates this amendment to our constitution that says marriage is a man and a women. So the answer is probably not, it is going to be harder. You are going to find it way more difficult. So asking Company D to step up and take a public position [and] say you know diversity of thought, keeping and retaining top talent, [and] recruiting top talent to come here. And I think when you have such an open and inclusive environment, whether or not you identify with the community or not, it's just good to come to work.

Creating an inclusive work environment also impacted an organization's productivity, especially in an economy where organizations have been under extreme pressure to increase efficiency while decreasing staff. One participant quoted the CEO of their company as saying,

Everyone needs to feel like they are included [and] they are important. We need everybody, we have so much work to get done. We need everybody to feel they can bring their full selves to work. We have to have it. We need it for growth, for innovation.

The same participant further elaborated, "We need everybody because [this organization] runs so incredibly lean, we need everyone to come and be 100% and give 100%. We need that."

Several participants shared that their organizations discovered creating a GLBT inclusive work environment was vital to employee satisfaction. This theme was also anticipated as significant to the research, shared in Chapter 2, and the Corporate Equality Index (CEI) itself suggested the importance of this theme. One company in particular

ascertained the importance of employee satisfaction by looking deeper into the organization's turnover rates. Specifically,

The first time I think [senior leadership] heard or felt that our culture may not be inclusive, because our turnover was 5%—no one ever leaves, but looking at [an] analysis of who is really content or not [when departing] we discovered disparity.

Other interview participants shared their personal belief in the importance of creating an inclusive workplace,

One of my primary reasons for wanting an ERG is to support and develop employees that are here, to give us some community and to help navigate benefits, to help with leadership development, and retention of gay and lesbian employees. And so that's so for me personally. It is, of course, community and giving back to other gay and lesbian employees who are here. So that's my main purpose and I think the other thing within the group, everyone has different reasons for being part of it and I think, you know, coming from HR, one of our objectives will be recruitment.

Creating an inclusive workplace is echoed by the following interview participant while at the same time illustrating the importance and impact that communicating the GLBT initiatives in a workplace can have.

I like to let people know that we [GLBT Employee Resource Group] are out there. And you know it is not just good for the GLBT people, it is good for others too – to know that they are in a company that is accepting. A lot of young people, at least in my division, this is what they are looking for. We have a lot of contractors, that's kind of our [business]. That is kind of where [our company] hires a lot of people that are from our contract staff. So [this contract experience] you know gives them a chance to look around the company looking for [inclusion]. Is this an inclusive place? And they can see from things like [seeing our ERG] that it is.

One interview participant in particular summarized the positive return on investment theme well,

You know you're creating this environment that employees want to stay here. You want to attract the talent that is inclusive of the LGBT community to create the diversity of thought and to really drive business

in the future. But also, how do you take that [diversity of thought] and harness that and create new products? Help our community, drive market share, and make your stockholders happy. I've been really struck by the complexity of it and, um, the navigation of it, and you know it comes up everywhere.

This subtheme characterizes the motivation of companies to create GLBT-inclusive work environments because doing so directly relates to a core business function. As identified in this research, most often these core business functions are related to sales, entering new market segments, and better understanding customers. One step in creating an inclusive workplace is by employee training and development. To score 100% on the CEI, companies need to offer training and development for all employees specific to GLBT topics in the workplace. Therefore, all the companies included in this research have offered this type of training. As I discovered, several organizations used this training to educate sales staff in ways that allow them to enter new markets or better understand their customers. One interview participant shared what they had learned from their sales team.

[In reference to GLBT inclusive training] a lot of our sales people went through it [who said] I need this and we need more of it, and I need more of it because I need to know for business development, bring more business into the company. I need to understand my current customers.

Commenting on entering new market segments, one participant shared,

Another piece that we can impact [sales] and also then [demonstrate] the “so what” for [our company] will be that [by scoring well on the CEI] we are building a future consumer, recognition that we are a gay and lesbian GLBT-supporting company.

A different participant revealed a similar viewpoint,

I'm trying to [demonstrate the ability to enter new markets] when I bring forward recommendations like the HRC Corporate Equality Index [and say] you know, there is this buyers' guide [and] here is why it is

important. I think that now we really are trying to build that case where it wasn't part of the equation at all before.

Another participant described the motivational factors for creating a GLBT-inclusive work environment as a way to be innovative, therefore giving their company a competitive advantage. They are at least recognizing that most companies are taking this step so because by not doing so, they would lose this innovation or competitive advantage. The participant stated,

[By doing so] we have innovative products and better market position so I think that's why [we create GLBT inclusive work environments] and I think that is why for a lot of companies.

From a different organization a participant had a similar view,

This is important to us as a company and our innovation, he [the CEO] was very clear we absolutely believe this. One, it's the right thing to do, to make sure all employees are included and not excluded.

For some organizations creating an inclusive work environment that embraces diversity is due primarily to the way in which an organization chooses its economic, social, and environmental impacts—recognized in the management literature as Corporate Social Responsibility (CSR). As stated by a senior HRD professional, “Well you know I think the one thing that, um, my boss has always drilled in and that we say all of the time is that diversity and inclusion is the driver of our business value.”

This statement was not unexpected as most of the organizations that participated in this study have mission and diversity statements that indicate diversity itself is a core value that drives their overall business. These statements relate to Corporate Social Responsibility (CSR) and are outlined in depth later in the discussion. At a fundamental level CSR is a business concept which, instead of being focused solely on profits or the

bottom line, is focused on a desire to be compassionate and have a value-based response to challenges facing society. One interview participant shared the following in reference to CSR and their choice to find employment at that organization,

As an organization, one of the reasons why I really like [this organization] as an employee, is that it tries to do the right thing. Like [offering] things like partner benefits way before [the competition], you know, like they must have started like 15 years ago when you know that wasn't a given that the larger organization would have partner benefits at that time and it was kind of unusual. [This organization] is or they were actually on the forefront because I think the leadership here thought it was the right thing to do.

Echoing this, a second participant stated quoted their CEO as saying,

This is important to us as a company, and our innovation, [our CEO] was very clear we absolutely believe this. One, it's the right thing to do, to make sure all employees are included and not excluded . . . micro-inequity, we can't have that. I have to be aware of what I am doing around that, making sure that everybody feels everybody's voice is heard.

Framing the importance of CSR to driving business, one participant shared the following summary,

Diversity and inclusion is a driver of our business value. On top of that we [the organization] think, it [creating a GLBT inclusive workspace] is the right thing to do, so we want to connect with consumers and customers and our communities that we work with and that we, um, work with and that we offer products to. We want make sure that our employee population mirrors the demographics of the constituents we serve whether they are consumers, customers, or communities. And so I think having our work place reflect that, um, includes LGBT as well as all of the other different ethnicities.

Several organizations have also stated that a core business function of their employee resource groups, including the GLBT resource group, is to help drive and inform business practice. As an example, one participant shared the following in reference to engaging an employee resource group,

So when it comes to we're expanding in China, how can I use our Asian Resource Group to help understand the cultural difference as we expand out there? So he [our CEO] looks at us [employee resource groups] as business models and uses our expertise and our thoughts about how we can expand to not just make Company D more inclusive as an organization, but how we can take those individuals within those resource groups and really branch out to the community to reach out to those people that need [our product] to choose us as a provider over someone else. Also as we expand into these different markets, making sure that we do so in a way that is not, you know, that isn't US-centric but represents their culture and their needs. He [our CEO] is really tapping into the resource groups to have them guide him as we expand into Latin America or Asia. To make sure we are doing it in a way that mirrors their culture.

A specific example of the way an organization can engage a GLBT resource group which directly related to a core business function was shared by one of the interview participants,

Embedded within our mission is our idea of addressing healthcare disparity and so where we [GLBT employee resource group] have been specifically tapped is . . . disparity issues within our community. You know the lesbian population is more prone to diabetes and lung cancer, we are more prone to be smoking, but that also creates a lot of cardiovascular problems, but we are also less likely than our heterosexual counterparts to go out and seek healthcare. So how can [our company] engage that community from a disparity healthcare issue? And the transgender community would be a good example of a community that is a little less prone to go to healthcare providers . . . that is what they need most as they begin to transition. So that is where we [GLBT employee resource group] are being pulled into larger business strategy discussions.

Important to note is that organizations in Minnesota are also concerned about the potential impact of the state legislation defining marriage between a man and a women. Specifically, one participated disclosed the following:

There is a strong concern as to are we [the company] going to be able to attract top talent within a state that creates this amendment to our constitution that says marriage is a man and a woman. And, so the answer is probably not, it is going to be harder. You are going to find it way more difficult. So asking to [our company] to step up and take a public position, and, ah, so would say you know diversity of thought, keeping and

retaining top talent, but also, you know, recruiting top talent to come here. And I think when you have such an open and inclusive environment whether or not you identify with the community or not, it's just good to come to work.

The document review also revealed insight related to core business functions. Not surprisingly, there is an apparent predisposition for mission statements to reference the organization's core business function; 8 of the 10 organization mission statements made this reference. The following are excerpts, which reference core business function, from the mission statements of 3 of the 10 organizations that are included in this study. Since these mission statements are public documents, the names of the companies correspond to the mission statement excerpts.

. . . we provide investors with an attractive return through sustained, quality growth . . . (3M)

. . . nourish every one by making their lives healthier, easier and richer. (General Mills)

We will provide America's Neighborhoods with a superior grocery shopping experience enhanced by local expertise, national strength and a passion for our customers. (Supervalu)

Theme 2: Element of a Broader Diversity Initiative

This theme describes the notion that creating a GLBT-inclusive work environment was simply part of an organization's broader diversity initiative. Specifically, creating a GLBT-inclusive work environment was not a stand-alone initiative but the result of a larger move to create an inclusive work environment for all employees. As one participant shared,

You know what, it just evolved, it wasn't part of any specific area or dimension of diversity. It was just, well, why wouldn't we kind of have this thing. Why wouldn't we? Of course we are going to be inclusive and it isn't, you know, GLBT isn't that inclusive. Yes it is, so what about

religion, so yes it is. We need to be inclusive. So it wasn't really called out as a decision specifically, it was just almost more all-inclusive.

Another participant shared,

We [the company] want to make sure that our employee population mirrors the demographics of the constituents we serve, whether they are consumers, customers or communities. And so I think having our work place reflect that it includes LGBT [employees] as well as all of the other different ethnicities that we look at [is important].

Placing emphasis on an organization's broader diversity initiative, one participant described the intersection between GLBT-inclusive work and the broader initiative in the following manner,

In the past 3 years they [the company] started a diversity and inclusion progression or mission program and slowly in the past year, year and half especially, we've started to incorporate GLBT into that.

Another participant conveyed,

I said we need to expand, we need to do more with diversity and inclusion. Great, we got a council, they were doing a couple different heritage months, Black history month, Asian Pacific heritage month, Hispanic heritage month, and an American Indian heritage month. So it was like a few different things, but there was not much being done for females or [the] GLBT [community] or really much of anything else.

And this participant went on to disclose,

So it wasn't called out separately but it was a natural part of that evolution so it has been the past 2 years.

Some participants described the intersection of GLBT inclusivity and the broader diversity initiative as simply being part of the organizational culture,

You know, I think that for as long as I have been within Company C it is simply part of who we are. I say a lot of times when I talk to other companies or other people that Company C 'walks the walk' but we don't do a lot of talking about it. And I think it is hard for anybody unless they were part of a movement or they were part of a committee to say this is

when they started doing something because really it is ingrained in a lot of who we are and what we do.

In reference to how one company's ERG corresponded to peer ERGs, one participant divulged the following,

One of 9 or maybe 10 employee resource groups, so we are certainly a part of [the broader organization of ERGs], I would say as far as, you know, we are definitely on the radar as an important part. I know we are thought of as important. At least that is my sense from the diversity and inclusion people.

This participant went on to provide an example of the forward movement, "You know since then we have filled in some other things like in 2008 we added gender identity and [gender] expression to the EEO harassment policies."

Another example of the relationship of the GLBT employee resource group compared to the others within the organization is described in this way,

Our diversity strategy, I would say that [company D's GLBT ERG] community is, you know, imbedded with all the other different affinity [ERGs] groups. But interesting now, with our new CEO, is that he has only been around for 6 months. Now he looks at the diversity groups, including the GLBT groups, as, you know, representative of the overall community.

Broader diversity initiatives manifest themselves in a variety of ways within organizations. One of those ways is developing a diversity and inclusion plan which is supported by training or other OD interventions to advance the goals of the plan. During the interviews the following statements were made that support this premise,

I think that we really do have a need for a unified diversity progression plan for progression and we need to include GLBT because we need that leveling education piece about how should we act, how we should be included, and what that means, ah, what that means for our organization.

A second participant from a different organization shared,

Year and a half later they started diversity activities within Company B. They did include one of the first waves of that, that push was to do training with all Company B employees, kind of Diversity 101, and as part of that training they included, um, an example of a gay scenario where you had to examine your bias or like what would your action be if you heard this in passing [yeah] um, so that was really, you know, sitting in that class, you know, that was a really good exercise for that diversity training because it kept us talking about something beyond racial diversity.

Theme 3: Internal Organizational Pressure

A significant theme that emerged from this inquiry was internal organizational pressure to create GLBT inclusive work environments. Three subthemes within this major theme include: (a) grass roots initiative, (b) a formal request from the GLBT employee resources group, and (c) a formal request from senior leadership of the organization.

Through several of the interviews it became clear that the motivation to create a GLBT-inclusive work environment often started internally when employees requested or inquired about it. One participant shared the following example of how their company decided to include GLBT diversity within the company's diversity and inclusion survey.

You know [the company] said when they were going to do a diversity survey to see what the needs were within [Company B] I asked HR, are you going to include GLBT [diversity]? And they said [employee name] sure give us some names. Then, between myself and another manager, we came up with a group of about eight gay and lesbian employees that [the company included] on a focus group survey.

The same participant further elaborated,

So I was asking the question [about resources for GLBT employees] and [the company] put me on the diversity council. Then, just this year, and newly on the council, I kind of got an 'ok' if I had some employees, gay and lesbian employees, that I could start informally meeting with them. So that is what we have been doing and we've been feeding up [to the

diversity council], you know, what kind of activities we have been progressing on. [We have been] working [with] the diversity council to start some structure to formally have an [GLBT focused] ERG.

Grass roots initiative. Several of the interview participants noted that changes in company culture, HR practices, and ways in which GLBT employees are recognized at their organization, fundamentally started as part of a grass roots initiative. Participants further noted that often these grass roots initiatives began a significant time ago, often before the interview participant was in their current position. When asked if moving the organization culture to be GLBT-inclusive started at the top, with senior leadership, one participant noted,

No, the top, definitely not, no, I don't think anyone sought us out and said, hey how do we get to 100 [on the CEI]? I think it has been us [employees] pushing it.

The participant further elaborated that,

It was long enough ago that I have to guess that it was probably grass roots, but there are a few of those questions out there, like when did something start, that we just don't know [the actions were too long ago].

Several participants also noted that they, or other individuals, took ideas and requests to senior leaders of the organization to improve the work environment for GLBT employees. One person shared the following,

I know that [our company] isn't this bad [in reference to score on CEI]. I know we have partner benefits, I know we have a lot of good things. This [the CEI] is a reference for, you know, people who are job shopping that are gay and lesbian so then [once pointed out to HR] took that to upper leadership who said, yeah that is terrible, move on it.

Another participant conveyed,

About a year and half ago [employee X] came forward and said, have you ever thought about doing GLBT or LGBT employee resource group? and [I said] no. I had just started and had launched a diversity enrichment

council [and a] women's leadership network that was our first official employee resource group. And that came out of [a survey] and focus groups. I said, well we don't have one yet, but absolutely, let's talk about it. What would that look like? So at that time we [HR] got involved.

Request for GLBT employee resource group. Collectively this theme has several strong references across multiple interviews. Interestingly, and very differently compared to the other themes, this theme didn't emerge with concrete examples provided by the interview participants. Instead, much of what was shared by participants is the understanding, based on what they had been told by others at their organization, is that the GLBT employee resource group had made the formal request to senior leadership and that this request motivated the company to change HR policy to create a GLBT working environment. Participants often noted that they could not provide specific examples because ERG had been formed before their employment with the organization began.

It was long enough ago that I have to guess that it was probably grass roots, but I'll ask for sure, there are a few of those questions out there, like when did something start, that we just don't know.

A different participant noted,

It was around 1990, somewhere in '94 to '96, and it was certainly led by our affinity group. There was an appetite for it but we needed that one person to stand up and drive, and at that time the chair of the affinity group [ERG]. . . she's been an advocate in the community at large so she's already familiar with, you know, everything from the HRC to Out and Equal, to Quorum, and she really had that drive and that business knowledge to attack it.

The final way in which this theme emerged follows,

Company B was actually on the forefront because I think Company B's leadership here thought it was the right thing to do and so I think there is a little prolonged history [before my time with the company] with the history of Company B. There are a lot of decisions that are made because it is the right thing to do, it's right for the employees, it reflects the values that Company B honors.

Request from senior leadership. In sharp contrast to the aforementioned theme, formal request from the GLBT employee resource group, a considerable portion of the interview participants noted that several organizational changes had occurred due to the recommendations of senior leadership. When asked the question, “Was the business decision to include GLBT diversity within the organization’s strategy a ‘top down’ decision or encouraged from others within the organization?” The following answers were provided by several participants.

I think it started with [HR] senior leadership and senior leadership. Recognizing that for the health of the organization [creating an inclusive work environment] is what we need to focus on [because] we need the best people and [satisfied] employees too, you know [the organization needs to] think, who is here? And who is going to be here?

A different interviewee noted,

The one thing that I can think of that came from the top down, versus the bottom up, was the overall commitment. When there have been questions of, you know, are we going to continue to remain at 100 [on the CEI] all the time regardless of what the survey [requires]? Or, you know, what is our commitment level? That really came from the top down. The top down said we are committed to this. There is not a question.

Another participant acknowledged,

You know [organizational policies] might be changing though, because I’m told that the board is, you know, the corporate board, is really starting to take a look at diversity and they are [making requests] in terms of diversity because the company has [been given from the board] this extra funding for the diversity and inclusion [work].

The same participant further noted later in the interview,

There is some pressure from the board, [but] I don’t know if there is enough [or any] pressure from shareholders or not.

One participant summarized,

It [the process of change] was partnering with HR, it was partnering with our executives, senior executive sponsors, and our board of directors. They have always been 100% on board: just tell us what we need to support, so it was a lot of partnering with leadership.

When recalling a discussion with senior leadership, one interview participant shared the following story which illustrates the importance of public perception for the organization,

Look at this—this is terrible, um, this is not where we are at, and by the way they [the Human Rights Campaign] also have a buyers’ guide and look, Company B [our company] is terrible on the buyers’ guide because we were bad on this survey [CEI].

Theme 4: Parity with Other Minnesota Companies

This theme is based on the premise that interviewee’s organizations have sought to create GLBT inclusive work environments in an effort to find parity with other companies based in Minnesota. Although this theme was not originally anticipated, it emerged early and is significantly supported by the participant interviews across several organizations. Many interview participants named aspirational peers, a subtheme, or asked what my research had found at other companies.

[Our] organization is motivated by parity with other companies. We don’t want to be a leader, but we want to be in the pack. Okay. And you know what? I like where the pack is, so I can use that and I did. I don’t know if it worked or not, but you know, if I can go ahead and say, well we’d like family medical leave benefits because General Mills and, you know, these six other companies around town have it. And by the way, here is a copy of General Mills’ policy and, you know, if that works, I am fine with that.

Later during the interview, the same participant elaborated further,

Like I said before, with the motivator, it’s going to be our VP of Benefits talking to the VP of Benefits across town at General Mills, who she had lunch with the day before, so say you gotta call her back about this FMLA

thing. You know she is going to ask about the retiree benefit thing, and say, hey, how did you guys do this? So, if we overcome it [get the benefits we seek] that will be the motivator.

One participant noted,

If it is benefits [the needed change] there might be multiple factors especially if there are external surveys done. Meaning more benchmarking on what our competitors are offering.

Of interesting note was the description of the collaborative process across organizations in Minnesota to find parity when making changes to HR policy to be GLBT inclusive,

It was a lot of partnering with a lot of organizations around the Twin Cities, you know, what are you doing? The chair [of our GLBT ERG], her partner works at Best Buy, so what is her affinity group doing? We met with Best Buy, Target, General Mills, and 3M because it was new for everyone.

An interviewee further described the continued collaborative process to share costs and find parity with Twin Cities organizations, “We are also really kind of branching out this year asking how can we partner with Best Buy and General Mills to consider sharing budgets and reach more people to share in promoting our scores on the CEI.”

Also of important note is the process of benchmarking across and among Twin Cities Companies Fortune 500 organizations. In reference to changing health benefits to include transgender health benefits one participant articulated the following,

We didn’t really have any data that said it [adding transgender health benefits] did cost anything. Everything we saw was a myth or preconceived notion or kind of a fear of what was going to happen, but once you got down to it – it was all kind of smoke to stop companies and make great excuses. But once we started looking at facts we are, like, it doesn’t equate. We are not seeing that. None of the companies we spoke to [across the Twin Cities or nationally] said that either. You know all of

the companies we spoke to when we made some of these changes and did our benchmarking, you know, said really the opposite. You know we haven't seen any increase in cost in how healthcare is managed.

Aspirational companies. This subtheme is characterized by interview participants naming companies they “aspire” to be more like in the area of GLBT inclusiveness. As such, I have left the names of the companies named within these findings because they do not reveal what companies participated in the research. They are merely cited by participants as companies they would like their own organization to be more like.

When discussing the process by which one company started moving towards changing HR policies to create GLBT working environments one participant shared the following aspirational narrative,

So a year ago she [director of Twin Cities Quorum] said, let's get you to General Mills. They are hosting [an event] for the Twin Cities Pride, let's get you there and see what other companies are doing and just get you to start networking. She said, I can help you with where to be at so that as a company you can start this journey [to create a GLBT inclusive work environment].

While commenting on the wishes of their organization to be more active in the GLBT community one participant shared the following,

Now we [my employing organization] are trying to look higher but we are not near on par with, like, let's say Target or Best Buy. We are not even in the same league as them and I don't think we will be ever [in reference to GLBT activism in the community].

Competition for skilled employees. As a subtheme within parity with other Minnesota companies, I have chosen to include competition for skilled employees. As noted by several of the interview participants, one of the primary reasons their

organization seeks parity is due to competition for top talent and retention of their current employees. One participant summarized it well,

So [the CEI score] matters. Maybe not to everybody but it is a quick scorecard and I imagine for some people and I have to think for the top talent out there in the workforce, if you're gay, you're gonna know about the CEI and that is going to be key in your job search.

A second participant made the following comments concerning competition for skilled employees, specifically the savvy GLBT consumer,

You think about the savvy LGBT consumer looking for future job employment or where they want to buy products—they look there [score on the CEI]. And our community has a lot of money. We did an analysis recently that, compared to other affinity groups, our buying power is intense. It is something like close to 10 billion dollars and we compare it to some of the other affinity groups you know. There is a good business reason to reach out to us.

As an example, one participant shared the following in regards to the importance of the CEI score to people without insider knowledge,

Because it [CEI score] is a quick way that a lot the rank and file people, who are not necessarily in touch with the leadership like I am, it is a chance for them to get a quick score card on how we [the employing organization] are really doing.

Another participant shared,

[Our GLBT ERG] likes to let people know that we are out there. This is often accomplished by the Corporate Equality Index score. And you know it is not just good for the GLBT people, it is good for the others, too. To know that they are in a company that is accepting.

In a unique way, an interview participant described the intersection of offering transgender health benefits and competition for employees, suggesting that some people felt offering this benefit would bring people to the company in a way that would increase costs.

There is a myth that people are going to come to your company, get the surgery [sex reassignment surgery] and leave. It is going to cost you [the organization] money. But when you take a look at how long it takes someone to go through all of counseling and the surgery and the follow up—that is a pretty good retention rate.

Theme 5: Fortuitous Chance

A significant theme that emerged from this inquiry is that chance, an unpredictable element, has played a key role in creating a GLBT-inclusive work environment. This surprising but intriguing theme was not anticipated by the researcher. Central to the theme of chance is that the motivational factor, as outlined by this inquiry, simply didn't exist for making a decision. Instead, the decision was completely unrelated to the motivation, or effect, of creating a GLBT-inclusive work environment. In describing how transgender health benefits became part of an organization's benefits offering, one participant shared the following,

I think that [it happened] because it was written into a generic Blue Cross policy. We just finally added it with Health Partners, so it was likely when Blue Cross did it. . . .and it must be somewhere in history. Somebody in legal has a copy of every plan we ever offered, and no one ever red-lined it, you know, it just happened.

The same participant further elaborated,

Or maybe somebody was actually reviewing the policy, and maybe that one person who was reviewing it was in favor of it and therefore didn't red-line it and didn't bring it to anybody's attention, and just let it slide by them. It could have been something like that.

When discussing how one organization scored better on the CEI compared to peer organizations, one participant disclosed the following sentiment regarding their ability to change their HR records system to include same-sex partners,

There are a couple things that we score well on, on the CEI, where a lot of people didn't. It is just because it just kind of happened. It makes us [our

company] look like leaders but it just kind of happened. Like one of them was [how our HR records system] defaults. And of course it means defined [to married same-sex spouse] which by most companies, those are challenges [to change]. Our default was, you have to sign somebody up [anyone] so there is no default. Well you know, that makes it easy. It looks like we are leaders then and in some ways I think we are doing pretty well.

When describing the process, the journey, of how one company became GLBT inclusive, an interview participant shared the following,

You know what, it just evolved, just evolved, wasn't part of any specific, um, area or dimension of diversity. It was just, well, why wouldn't we kind of thing. Why wouldn't we? Of course we are going to be inclusive and isn't, you know, GLBT—isn't that inclusive? Yes it is, so, what about religion? So yes it is, we need to be inclusive. So it wasn't really called out as a, um, a decision specifically. It was just almost more all-inclusive.

As outlined in Chapter 3, a relevant piece of this research which complements the data collected from the interviews is a review of company documentation. Including a document review also triangulates the research strategy. For this research endeavor, the mission statements, EEO (Equal Employment Opportunity) statements, diversity and inclusion statements, and company snapshots from Standard and Poor's were included for analysis within the document review. A summary of those findings relevant to the motivational factors for creating a GLBT inclusive work environment follow.

Mission Statements

A textual examination of the different ways that elements are articulated within mission statements identified some interesting insights. An example is the lack of any language around sexual orientation, gender identity, or gender expression. Also of interest, only 3 of the organizations articulated a commitment for diversity within their mission statement.

- “ . . . Promote a culture of diversity and inclusion . . .” Excel Energy

- “We serve people through a value and performance culture based on integrity, quality, innovation, diversity and social responsibility.” United Health Group
- “To support our mission, we are guided by our commitments to great value, the community, diversity . . .” Target Corporation

Equal Employment and Opportunity Statements

A review of the Equal Employment and Opportunity statements revealed significant similarities across organizations. An example is the language around the protection of sexual orientation. Eight of the 10 organizations reviewed specifically articulated sexual orientation and gender identity. There is a clear affinity for citing sexual orientation within the list of protected populations. The following are excerpts from the EEO Statements collected and reviewed.

Federal or state law.

- “Our programs are designed to comply with all applicable federal, state, and local laws, directives and regulations and cover all human resource actions”
- following employment practices designed to prevent illegal discrimination.
- in accordance with applicable federal, state and local laws

Gender identity.

- “ . . . affirms the right of every person to participate in all aspects of employment without regard to race, . . gender identity or expression, marital status . . .” 3M
- “Best Buy will not discriminate on the basis of age, . . gender identity, gender expression, . . . or veteran status, or any other legally recognized protected basis . . .” Best Buy
- “This means that we will strive to hire and promote individuals and to administer all human resources actions without regard to race, . . . gender identity, sexual orientation, disabilities of otherwise qualified individuals, . . any other protected group.” Supervalu

Commitment to diversity.

- “Diversity is more than a priority at 3M. Diversity is our business model.” 3M
- “By leveraging a diverse, highly skilled workforce, we create strategic and competitive advantages. Valuing diversity is about respecting all people and creating an inclusive environment” Xcel Energy
- “. . . strives to maintain a workplace that accepts and appreciates the differences among our employees.” United Health Group

Diversity and Inclusion Statements

A content analysis of the numerous ways that diversity is articulated suggests some interesting observations. Within the diversity and inclusion statements a pattern

emerged that included defining what diversity and inclusion meant for each company and relating the importance of diversity to workplace performance. An illustrative example includes,

Diversity is individuality. It's a wide spectrum of traits, including personal style, age, race, gender, ethnicity, sexual orientation, gender identity or expression, language, physical ability, religion, family, citizenship status, socioeconomic circumstances, education and life experiences. We see diversity as any trait that makes someone unique and does not interfere with effective job performance.

The following are additional excerpts from the diversity philosophy statements that seek to define diversity and inclusion,

- “ . . . Diversity is all of the ways we are similar and different. Inclusion on the other hand, is about finding ways to honor, enable and celebrate these things that make us who we are as individuals.” Best Buy
- “Diversity is the essence of our work place: age, gender, ethnicity, sexual orientation, native language, geographic allegiance, race, education, background, and personality. Inclusion is the culture we build, welcoming our diversity and the opportunities that lie within the talent and knowledge of our employees.” Xcel Energy

Supplier or customer diversity.

- “ . . . encourages diversity, across its supply chain and throughout society. We purchase from minority- and women-owned suppliers, opening avenues of opportunity in the marketplace.” General Mills

- “We rely on our diverse global work force to understand the needs of these diverse customers and to generate a breadth of ideas that yield innovative solutions.” 3M
- “. . . give us a competitive edge and enable us to build an associate population that more accurately mirrors the customers who shop in our . . .” Supervalu

Commitment to diversity.

- “. . . committed to developing and maintaining a workplace that reflects the diversity of the communities we serve.” U.S. Bank
- “We work hard to make diversity an integral part of our culture . . . We respect and value the individuality of all team members and guests.” Target Corporation
- “Principles of diversity and inclusion are integrated into learning, development, performance, and reward programs helping to ensure advancement and retention of talent within the organization.” United Health Group

The organizational mission statements provided little insight on the motivational factors for companies to create GLBT inclusive work environments. Not surprisingly, these mission statements typically focused on success in core business practices. In contrast, the EEO statements conveyed much more. The EEO statements are where an organization’s respect and protection of gender identity is often communicated. The EEO statement is also where several sources cited they follow guidelines set by state and

federal law—which is important, and directly related, because state and federal law often provide mixed or conflicting practices for protecting GLBT persons in the workplace.

Organizational Resistance to Inquiry

A significant amount of evidence suggests that organizations welcome scholarly inquiry (Rynes & McNatt, 2001). Throughout this research inquiry I generally found this to be true. However, on two specific occasions I discovered organizational resistance to participation in this research project. Academic scholars have noted perceived barriers to conduct research within organizations because the organization questions the practical benefits of the research or because the topic is sensitive in nature with the potential to harm operations (Rynes & McNatt, 2001). My research endeavor found the latter to be true.

The two organizations that declined to participate cited sensitivity due to recent negative media headlines pertaining to their organization and GLBT equality in their workplace. In 1 of these 2 circumstances, the primary organization contact made it apparent that although their organization supported GLBT equality in the workplace, and supported the idea of this research endeavor, the organization simply could not risk additional exposure on this topic and therefore declined to participate. Further, it was my understanding that for this organization the discussion as to whether or not to participate occurred among high-level leaders. Although the impact to this research project was minimal, these experiences demonstrate that in some cases barriers of access exist. Although not significant to my research findings, this barrier has the potential to bias the research and impact findings.

One interesting question that should be explored in further research pertains to my perception that organizations that recently scored 100% on the Corporate Equality Index (CEI) were less likely to agree to participate. Specifically, is there a correlation between an organization's willingness to discuss this topic and the length of time the organization has been a leader in creating a GLBT inclusive work environment?

After analyzing the Company Snapshots, as provide by Standard and Poor's, several conclusions could be made—see Table 12. The first conclusion is that an organization's primary industry is not an influential motivator to create GLBT inclusive work environments. Of the 10 companies that score 100% on the CEI in Minnesota, each of these organizations are in different industries as supported by their Standard Industrial Classification (SIC) code. Further, only a few of the organizations are in related industries.

Another conclusion that can be made is that smaller companies, 10,000 employees or less, do not participate in the CEI. Of the 20 Fortune 500 organizations in Minnesota only 1, Land O'Lakes, with less than 10,000 employees participated in the index—see Table 12. Significant disparity in participation exists due to the size of the organization. This is an interesting insight that should be researched further. Related to company size, there is also a correlation between Fortune 500 rank and completing the survey. The higher the rank the more likely it is that the company participated. As an example, the top 5 ranked companies all participated, of the top 12 ranked companies only 1 chose not to report/participate.

Table 12

Minnesota's 2010 Fortune 500 Organizations CEI Score 100% and Industry Breakdown

Company	Fortune 500 Rank	State Rank	2011 Revenues Millions	CEI Score 2011	Number of Employees	Primary SIC Code
3M Co.	97	5	23,123.0	100	80,057	Surgical and Medical Instruments (3841)
Alliant Techsystems	472	20	4,807.7	65	18,000	Ammunition, exc. For small arms, nec (3483)
Ameriprise	246	12	10,046.0	100	10,472	Investment Advice (6282)
Best Buy	47	3	49,964.0	100	180,000	Radio, TV, & electronics stores (5731)
C. H. Robinson Worldwide	265	13	9,274.3	NR	7,347	Freight transportations arrangement (4731)
CHS	103	6	25,267.9	NR	7,641	Grain and field beans (5153)
Ecolab	378	17	6,089.7	100	20,000	Polishes and sanitation goods (2842)
General Mills	166	9	14,796.5	100	33,000	Cereal breakfast foods (2043)
Hormel Foods	325	15	7,220.7	NR	456	Meats and meat products (5147)
Land O'Lakes	218	10	11,146.4	53	8,700	Creamery butter (2021)
Medtronic	158	8	15,817.0	100	43,000	Electromedical equipment (3845)
Mosaic	346	16	6,759.1	NR	3,000	Phosphatic fertilizers (2874)
Nash-Finch	449	19	4,992.0	NR	5,030	Groceries, general line (5141)
St. Jude Medical	436	18	5,164.8	NR	14,000	Electromedical equipment (3845)
Supervalu	61	4	40,597.0	100	142,000	Grocery stores (5411)
Target	33	2	67,390.0	100	355,000	Variety stores (5331)
Thrivent Financial for Lutherans	318	14	7,470.5	NR	3,009	Life insurance (6311)
United Health Group	22	1	94,155.0	100	87,000	Hospital and medical service plans (6324)
U.S. Bancorp	126	7	20,518.0	100	56,000	National commercial banks (6021)
Xcel Energy	237	11	10,310.9	95	11,351	Electronic and other services combined (4931)

Note. Adopted from "The State of the Workplace," by Luther, S., Human Rights Campaign Foundation, p. 17–28; Fortune, 2011.

Throughout Chapter 4, I have endeavored to relate the findings of the interviews and document review data to the questions of this inquiry. By incorporating quotations and literature references and expanding upon each theme, this inquiry has made significant progress in identifying the motivational factors of Minnesota's Fortune 500 organizations to create GLBT-inclusive work environments; answering the research questions. These characterizing findings provide the fundamental framework for the discussion in the next chapter. In summary, the findings of this case study outline six major motivating factors for Minnesota's Fortune 500 to create GLBT-inclusive work environments. These themes are: (a) positive return on investment, (b) element of a broader diversity initiative, (c) internal organizational pressure, (d) parity with other Minnesota companies, and (e) chance. , Chapter 6 discusses these findings and ties them to the literature.

CHAPTER 5

Research Summary

This study was designed to break new ground by providing insight regarding why Fortune 500 organizations in Minnesota have spent significant HRD resources to create GLBT-equitable work environments. This chapter provides an analysis of those data that were collected by interviews and document review by way of the inquiry methodology described in Chapter 3.

The literature review in Chapter 2 provides support that despite criticism of GLBT rights in the workplace, a significant increase in the number of Fortune 500 organizations that have created GLBT-inclusive HR policies and practices has occurred (HRC, 2009), and that companies in Minnesota are no exception. The literature review reveals that federal legislation such as Title VII, The Defense of Marriage Act (DOMA), and Don't Ask Don't Tell (DADT) have not provided companies with federal guidelines to direct the development of policy (Butler, 1998). In fact, the federal government has not provided any legal protections based on sexual orientation or gender identity (HRC, 2009). To further convolute matters, the Obama Administration, in a major policy reversal, has directed the Department of Justice (DOJ) to no longer defend DOMA due to questions regarding the constitutionality of this legislation. Yet, DOMA is still the prevailing law that many organizations feel obligated to follow. Given that, in most areas, protections for GLBT persons are not outlined by law, coupled with the fact that a significant number of Americans oppose the legitimacy of GLBT rights, organizations face a dilemma. This quandary has emerged as an intense national debate leaving

organizations with significant questions amid a small number of resources, little guidance, and few examples of best practice.

Throughout this chapter, I present a summary of the research inquiry and provide an in-depth discussion of the five identified themes that emerged from this study, while at the same time grounding them within existing literature. The major themes of this study identify five motivating factors for Minnesota's Fortune 500 to create GLBT-inclusive work environments. These themes are: (a) positive return on investment, (b) element of a broader diversity initiative, (c) internal organizational pressure, (d) parity with other companies, and (e) chance.

Study Overview

Given the current national discourse concerning the Defense of Marriage Act (DOMA) and Minnesota's 2012 ballot measure proposing to amend the state constitution to define marriage as being between a man and a woman (Stassen-Berger, 2011) this study emerges at a time when the rights of GLBT people in the workplace and broader society often lead news headlines. Within the literature it is well recognized that developing and adapting Human Resource (HR) policies and practices is difficult, time consuming, and, therefore, costly to organizations. Within this framework I ask the question, what motivates Minnesota's Fortune 500 organizations to make significant changes to HR policies in an effort to create equitable work environments for GLBT people? To that end, this inquiry seeks an improved understanding of why companies expend considerable resources to create equitable work environments for GLBT employees.

The study focused on Fortune 500 corporations headquartered in the state of Minnesota; a total of 20 in 2011. A document review including the mission statement, Equal Employment and Opportunity (EEO) statements, diversity philosophy, and company snapshot was conducted on each of Minnesota's Fortune 500 organizations that scored 100% on the Corporate Equality Index (CEI); a total of 10 in 2011. The inquiry also included semistructured interviews with lead HRD professionals and members of that organization's GLBT employee resource group. A total of 6 participants representing 4 companies participated in the interviews, representing 40% of Minnesota's Fortune 500 organizations that score 100% on the CEI. A collective (multiple) case study methodology is used to study this phenomenon.

The growing trend of Fortune 500 organizations to create GLBT-inclusive work environments has not been paralleled by an equal amount of scholarly inquiry. Although numerous organizations have developed policies that affirm sexual diversity in the workplace, little research exists on the implications of these policies for GLBT employees or the organization they work for (Button, 2001). Following a review of the literature, I found few scholarly articles or research that examined the motivation behind corporate America's move to create GLBT-inclusive work environments. Even more surprising, I found few scholarly inquiries studying the intersection of GLBT equality and the workplace. The lack of scholarly inquiry is regrettable as this research has the potential to significantly shape organizational practice in creating equitable work environments. Ivancevich and Gilbert (2000) advocate that until a greater number of empirical studies is completed, organization leaders need to rely on instinct, consultant

recommendations, and the few available scholarly inquiries to make decisions as to how and where to proceed with diversity management programs.

Restatement of the Inquiry Purpose

My research endeavored to study the motivational factors behind Fortune 500 companies in the state of Minnesota to spend significant HRD resources to create equitable work environments for GLBT employees. This case study is confined by both location in the state of Minnesota and categorization as a Fortune 500 organization. Within this study, equitable is defined as dealing fairly and equally to all persons. From the company perspective of this study, being equitable requires providing the same HR benefits, in the same way, to GLBT persons when compared to their heterosexual peers. Due to the absence of previous inquiry and literature on this topic, the themes that emerged from this study rely exclusively on the data gathered.

Data Findings and Analysis

This segment delves deeper into themes which emerged from the inquiry while relating these themes to an in-depth literature review.

Theme 1: Positive Return on Investment (ROI)

This significant movement towards GLBT-inclusive HR policy consumes considerable time, energy, and cost for organizations. However, regardless of cost to the organization, the majority of Fortune 500 corporations have chosen to be inclusive (HRC, 2009). In comparison some companies have chosen to not be inclusive. What then is the Return on Investment (ROI) for the companies that choose to be inclusive? The primary finding of this inquiry is that companies found a ROI that positively impacted the

organizations' bottom line. Specifically, themes within in this inquiry that are measurable and positive ROIs for organizations include: (a) job satisfaction, (b) increased productivity, (c) employee retention, and (d) an impact directly related to the company's core business function—often in the form of Corporate Social Responsibility (CSR).

At a fundamental level, return on investment (ROI) is the most common profitability ratio that organizations use to measure the effectiveness of an initiative at creating revenue; the higher the ROI the better. It is in this spirit that increased productivity, job satisfaction, employee retention, and positive impact to a core business function are significant ROIs which have motivated organizations to create GLBT-inclusive work environments. This theme is exceptionally well supported in the scholarly literature. As an example, an extensive review by the Department of Labor covering more than 100 studies that explored the association between progressive people practices and improved bottom-line results indicated a positive correlation among training, motivating, and empowering employees and improvements in productivity, employee satisfaction, and financial performance (Winston, 2008).

Job satisfaction and work environment. The literature is replete with definitions of job satisfaction. For this discussion I chose to apply Locke's (1976) notably influential definition of job satisfaction as "a pleasurable or positive emotional state resulting from the appraisal of one's job or job experiences" (p. 1300). A supplementary definition is that 'satisfaction of one's job is the degree to which employees have a positive affective orientation toward employment of the organization' (Mor Barak & Levin, 2002; p. 137). During the 1990s scholarly inquiry introduced considerable

questions about the causes of job satisfaction while also advancing a deeper understanding and means to measure (Brief & Weiss, 2002). It is during this time frame that the discussion concerning culture of the work environment and job satisfaction truly emerged.

The environment of the workplace has long been recognized as having a significant effect on job satisfaction. As noted by Kane-Urrabazo (2006) culture symbolizes the personality of the company having both influence on employee satisfaction and company success. As Ostroff and Bowen (2000) suggest, the workplace environment, the shared understanding of the work environment, is a significant determinant that influences whether or not employees in the company will empower the organization to attain competitive advantage. Several studies have recognized that diversity characteristics correlate negatively with job satisfaction (Mor Barak & Levin, 2002). Studies cite that employees' perception of exclusion may be central to explaining the correlation between the absence of opportunities experienced by individuals who are different from the traditional company stereotype and their capabilities in, and satisfaction from, their roles as employees in companies (Greenhaus, Parasuraman, & Wormley, 1990). Mor Barak and Levin (2002) suggested that a significant element in retention of employees from underrepresented backgrounds is their perception that they are regarded fairly by the company and that they are provided similar options for promotion and equal job opportunities. It is within this notion that GLBT employees may feel different from the company norm, therefore excluded, even though they have the talent and skills necessary to perform the work. In contrast, companies that create a

welcoming and inclusive work environment can better capture employee talent and create a competitive advantage.

Several studies have indicated that the degree to which gays and lesbians are satisfied with work is directly correlated to how accepting they perceive the workplace environment to be (Button, 2001; Day & Schoenrade, 1997; Ellis & Riggle, 1995). Additional research has shown that lesbians and gay men are increasingly sensitive to and, therefore, affected by their work climate when making appraisals of workplace outcomes (Lyons, Brenner, & Fassinger, 2005). Earlier research has suggested this heightened sensitivity may be due to GLBT persons being pressured into managing a stigmatized identity (Fassinger, 2000). While completing the participant interviews the researcher saw a noticeable theme emerging centered on creating a work environment that supported retention; comments included retaining talent, building company leaders, being a competitive employer, and creating an inclusive work environment.

Person-Organization (P-O) fit is defined as the compatibility between a person and the organization, focused on the extent to which the person and the organization share similarities and/or meet one another's needs (Kristof, 1996). Since the late 1990s, management scholars have shown an interest in P-O fit (Lauver & Kristof-Brown, 2001). This interest can be credited to several benefits to a person's career—including job satisfaction and organizational commitment. As it relates to this inquiry, researchers have found P-O fit is of greater importance to LGB employees compared to their heterosexual peers (Lyons et al., 2005). Specifically, Lyons et al. (2005) found that roughly one half (48%) of LGB employees' job satisfaction can be credited to the degree to which they

feel they fit with their environment. In an interesting comparison, results of this study suggest that, for LGB employees, perceived fit with an organization has more influence on job satisfaction compared to perceived discrimination. This supports the research findings that GLBT employees are notably concerned about their fit within an organization, increasing the importance for organizations to create GLBT-inclusive work environments.

Creating an inclusive work environment that enables all employees, including GLBT employees, to bring their whole selves to work has a significant and favorable impact on an organization's bottom line. In contrast, if employees perceive it to be better to stay in the closet, or if they have negative experiences centered on sexual identity in the workplace, this can create a negative stereotype of the entire organization. Research by Day and Schoenrade (1997) demonstrated that the more open employees are about their sexual identity the more committed to the organization they will be, have higher job satisfaction, perceive greater support from top management, have lower role ambiguity, and have less conflict between work and home. Ragins and Cornwell (2001) found that managing diversity, specifically GLBT diversity, well increases employee levels of satisfaction, commitment, and positive attitudes. One study used the Job Descriptive Index (JDI) to evaluate job satisfaction in relation to the openness of an employer and found gays and lesbians open about their sexuality was positively related to increased job satisfaction (Ellis & Riggle, 1995). Mor Barak and Levin (2002) advocated that employees' perceived level of inclusion came out as the greatest predictor for both job

satisfaction and well-being. Given these findings in the literature, is it clear that the work environment as perceived by GLBT employees is significant and progressive.

Scholarly research also has identified several ways in which negative factors in the work environment can be detrimental to organizational success. Button (2001) found that discrimination in the workplace, perceived or outright, towards GLBT persons was negatively correlated to job satisfaction and organizational commitment. Observations of heterosexism, discrimination that favors heterosexuals, can also have a negative impact. Brenner et al. (2010) uncovered that perceptions of heterosexism in the workplace can predict levels of how open GLBT persons will be in that environment. Recognizing this, organizations can take steps to decrease heterosexism to improve the work environment. A fundamental influencing element in decisions to remain with an employer is whether or not employees feel included in the workplace environment (Mor Barak & Cherin, 1998). Companies that have created environments affirming GLBT employees most often have articulated policies that forbid discrimination against GLBT employees, offer same-sex benefits, and welcome same-sex partners at organization functions (Ragins & Cornwell, 2001). Further, companies can take a step towards decreasing heterosexism while increasing behaviors that ultimately support the organization's overall success through support of GLBT employees (Brenner et al., 2010). These negative factors can have an adverse impact on an organization's bottom line.

Increased productivity and greater innovation. A theme of increased productivity and greater innovation within the ROI context emerged during the inquiry. This theme is characterized by participants' comments or documents which supported the

premise that creating a GLBT inclusive workplace increases company productivity and promotes greater innovation. As noted earlier, little research has been done on the potential costs and benefits to an organization on employees being out in the workplace. Important questions relating an employee's perception of organizational environment in terms of levels of workplace "outness" to organizational performance, including productivity and production, remain (Brenner et al., 2010). In comparison, research on the relationship between climate and work performance at the organizational level has been of interest to scholars for much of the past century (MacCormick & Parker, 2010).

Within the literature it is well documented that in today's dynamic and progressively competitive business environments, companies must consistently seek out innovative solutions to organizational or market problems (De Clercq, Thongpapanl, & Dimov; 2011). Over the last few years, accelerating trends in globalization and technology have created an even more complex environment that tests and challenges the ability of organizations to adapt to these fast-paced changes and to respond with innovative strategies (Berchicci, 2011; p. 674). For the purpose of this inquiry, innovation is defined simply as the degree to which an organization works to develop new products and services that are accepted by economic markets. Productivity is defined herein as the measure of efficiency in production of a good or service. From a management perspective, increased productivity equals better performance.

Combined, job satisfaction and commitment lead to increased company performance. De Clercq et al. (2011) found that lack of organizational commitment can be counterproductive while having organizational commitment can positively influence

the extent to which the company's innovative ventures can lead to increased performance. Further, De Clercq et al. identified many arguments about how greater organizational commitment increases the innovation–firm performance association. As noted by Mor Barak and Levin (2002), a significant concept in the retention of diverse employees is their sense that they are being treated fairly. Taken together, support in the literature and the finding of this inquiry suggest that companies are motivated to create GLBT-inclusive work environments because doing so increases an organization's ability to benefit from the intersection of job satisfaction, commitment, and innovation—leading to increased company performance.

Organizational commitment holds an important place within organizational development (OD) and several definition of organizational commitment can be found in the literature. Bateman and Strasser (1984) defined organizational commitment as “multidimensional in nature, involving an employee's loyalty to the organization, willingness to exert effort on behalf of the organization, degree of goal and value congruency with the organization, and desire to maintain membership” (p. 95).

Many authors have theorized that being out in the workplace is related to an increased level of individual performance and, as a result, to an increased level of organizational performance (Powers, 1996). When considering the importance of P-O fit, one study found that promoting high levels of P-O fit among employees (e.g., creating a GLBT-inclusive work environment) encouraged high levels of performance and extra-role behaviors (Lauver & Kristof-Brown, 2001), i.e., behaviors which are not part of an employee's formal job functions. Evidence also suggests a positive ROI when offering progressive human resource practice (Johnston & Malina, 2009).

Companies also can receive a significant ROI by participating, and scoring well, on any one of the numerous diversity rankings authored by national publications. As an example, *Fortune* magazine cites a positive correlation between organizations listed in “The Best Places to Work in America” and greater company performance (Winston, 2008). Hannon and Milkovich (1996) found positive stock market returns for companies named “Best Company for Working Mothers.” As it relates to this inquiry, it is plausible to assume that organizations that score well on the Corporate Equality Index also receive a positive ROI in company performance and stock market returns.

Employee retention and recruitment. A compelling return on investment for creating an inclusive work environment is the notion that employees are the company’s competitive future and, therefore, creating an inclusive work environment retains these employees and provides a competitive advantage. Employee retention was a prevalent theme cited within the participant interviews. In fact, all of the interview participants cited employee retention as a motivating factor to create a GLBT-inclusive work environment. Friedman and Holtom (2002) noted that scholarly articles within the literature identify retention of minority employees, including GLBT employees, to be affected by several considerations including job satisfaction, organizational commitment, and perceived availability of alternate employment opportunities. It should also be noted that providing same-sex benefits, which is discussed in greater detail later, is recognized to increase the pool of qualified candidates (Astray-Caneda, 2011). As discussed previously, the beliefs employees hold about their work environment, their perception of the company’s equity in its policies and practices, the support they receive from

colleagues, and their sense of stress all impact job satisfaction and, in the end, the employee's desire to remain in the organization (Mor Barak & Levin, 2002).

As the research progressed, it became apparent that an organization's score on the CEI was related to the rate of employee retention. Several people stated during their interviews that they or people they knew would only consider employment at companies that scored 100. Further, many of the participants in the research indicated that when providing a service to another company on behalf of their current employer they researched that company's CEI score in an effort to determine how GLBT-friendly the organization was.

GLBT employee resource groups (ERGs) offer a space for social support and a systemized manner for employees to advocated for changes in their organization (Githens & Aragon, 2009). An organization's GLBT ERG can significantly shape the work environment for GLBT employees, is a significant factor on the CEI score, and directly impacts employee retention. As Friedman and Holtom (2002) wrote, "These groups—usually initiated by the employees themselves, but supported by the company—are designed to help minority employees be better connected to each other, and thus gain greater access to information, social support, and mentoring" (p. 405).

Of significant insight and having practical application, Friedman and Holtom (2002) found that ERGs can be advantageous for helping organizations retain supervisory-level minority employees, thereby helping companies meet their diversity objectives. It should be no surprise that a significant growth of GLBT ERGs has occurred in the U.S. Raeburn (2004) found that the number of GLBT ERGs in the Fortune 500

grew from 2 in 1980 to 69 in 1998. Currently, 64% of the organizations rated by the Corporate Equality Index have GLBT ERGs (HRC, 2012).

Joining network groups, it appears, is associated with reduced turnover intentions for higher ranked employees. This is critical for companies that are moving from “creating diversity” at entry levels within the organization to “managing diversity” by ensuring that minority employees succeed once they are hired into the organization (Friedman & Holtom, 2002, p. 407).

Organizations have a long history of using employee benefits to recruit and retain employees. In the same manner, organizations have recognized that providing same-sex benefits is a means for companies to stay competitive by recruiting and retaining GLBT and other fair-minded staff. In this way, companies recruit and retain employees to advance a competitive advantage (Abrigo, 2008). In addition to recruitment, companies have chosen to provide same-sex benefits based on a point of fairness and many believe offering these kinds of benefits works to alleviate civil rights inequities (Astray-Caneda, 2011; Ash & Badgett, 2006). This has led to a substantial increase in the number of organizations that provide same-sex benefits. A study by Chuang, Church, and Ophir (2011) found that same-sex benefits in Fortune 500-ranked organizations increased from 2 in 1992 to 218 in 2003. According to the HRC, 89% of CEI-rated employers provide medical and comprehensive health benefits (HRC, 2012). Providing same-sex benefits can be a significant challenge for today’s organization. Concerns about cost and the complexities of the tax system, balanced with the return on investment, have shaped the development of offering same-sex benefits.

The practice of offering same-sex benefits truly took off in the 1990s during which the practice was considered extremely controversial because gays and lesbians were socially stigmatized (Chuang et al., 2011). Initially many employers and insurance companies were concerned that people most likely to use the same-sex coverage would have above-average health costs due to supporting HIV-infected gay men (Ash & Badgett, 2006), an incorrect assumption. Movements that have promoted same-sex benefits are based primarily on fairness and that exclusion was a matter of unequal pay (Costello, 2002). The civil rights and equality arguments for providing same-sex benefits have gained significant momentum in U.S. corporations. Even in manufacturing industries, companies including General Motors, Ford, and Chrysler have accepted UAW requests to offer same-sex benefits (Boris, 2010). At the time of the research there is a significant acceptance of same-sex benefits and, as Costello (2002) noted, today it is practically an expectation that companies will provide this benefit.

Numerous studies attest that GLBT employees are happier and perform better when they feel supported in the work environment (Astray-Caneda, 2011). In a study looking at the relationship between gay and lesbian perceptions of the workplace and same-sex benefits, Ragins and Cornwell (2001) found significant correlation between offering same sex benefits and perception of workplace discrimination of gays and lesbian employees. The HRC also noted that providing same-sex partner benefits is a low-cost means for companies to remain competitive by attracting and retaining GLBT employees and other fair-minded staff (HRC, 2012).

From an organizational perspective, providing same-sex benefits is complex (Travinski, 2006). Although significant advances in the extension of same-sex benefits have been made, the movement has also incurred recent setbacks (Costello, 2002). As Travinski (2006) wrote, despite the fact that numerous states and local governments work to offer same-sex benefits, their efforts are encumbered by federal law. Organizations must be familiar with the complicated benefits, employment, and tax issues that come along with same-sex benefits (Abrigo, 2008; Travinski, 2006). Tax consequences impede employees from enrolling their partners for health care benefits as the value of these benefits is taxable (Costello, 2002). This is because under the Defense of Marriage Act (DOMA) same-sex partners cannot be recognized as spouses under the federal tax code (Costello, 2002). The larger the organization, the more complex the practice becomes. While the tax issue is difficult for single-state employers, it is compounded for multistate companies that want to use a single company-wide policy (Abrigo, 2008; p. 18).

The literature has supported the assertion that the advantage of providing same-sex benefits outweighs the costs (Abrigo, 2008; Costello, 2002; Ash & Badgett, 2006). The majority of companies providing same-sex benefits experience a financial impact of less than 1% of the total benefits cost (HRC, 2010; p. 16). Some literature also suggested that the cost of same-sex benefits is no greater than benefits to married couples (Astray-Caneda, 2011). The spirit of equality, plus more successful recruitment and retention, make it well worth organizations' decisions to offer these benefits (Costello, 2002). A prevailing concern of offering same-sex benefits is cost due to increased health care, however, organizations have found that the cost increase is minimal (Costello, 2002; Ash

& Badgett, 2006). Costello (2002) and HRC (2012) specifically cited that adding same-sex, or domestic partner benefits, raises costs by .5 to 3%.

The increasing prevalence of domestic partner benefits has begun to encourage legislation, making it easier for companies to offer same-sex benefits. Two recent bills, The Tax Equity for Health Benefits Act (H.R. 1820) and The Tax Equity for Domestic Partner and Health Plan Beneficiaries Act (S. 1556), would preclude health benefits from federal income tax (Abrigo, 2008).

Leaders of today's organizations recognize that HRD programs can represent major outlays of organizational resources and thus require proof of an HRD program's expected impact on performance (Swanson & Holton, 2001). When organization leaders make decisions to spend significant amounts of money on HRD they seek to evaluate these decisions in the same way they evaluate other significant investments, most often on the foundation of financial returns (Swanson & Holton, 2001). Recognizing this, it is clear that organizations must see a significant ROI for creating HRD programs that encourage GLBT inclusiveness. Organizations that wish to increase employee retention metrics among diverse employees and successfully manage the careers of these employees should seriously contemplate supporting and advancing ERGs (Friedman & Holton, 2002).

Corporate social responsibility. A critical theme that emerged from the inquiry is that organizations sought to create GLBT-inclusive work environments because doing so directly relates to a core business function. As noted by interview participants, most often these core business functions included increasing profit by entering a new market

segment, better understanding GLBT customers, and—notably—the positive impact that corporate social responsibility (CSR) can produce.

Branchik (2002) conjectured that advancement and maturity of the GLBT market segment parallels the advancement of the gay community and rights movement in the U.S. and is underscored by significant historical events that helped propel the segment forward by means of recognition, size, and ability to be identified. A limited history of the GLBT community is outlined in Chapter 2. Johnston and Malina (2009) recognized the GLBT community as an active, considerable, and growing group of stakeholders. Currently recognized by organizations as a lucrative minority market segment with comparatively elevated disposable income, the gay community has been sought after by an ever-growing variety of organizations and featured in various articles and books directed at organizations that want to reach this market (Branchik, 2002).

Corporate America is beginning to recognize the GLBT community is no longer a narrow niche market (Witeck-Combs, 2007). Estimates in the mid-2000s suggested the GLBT market segment was worth \$75 billion (Halpern, 2004). A market survey completed in 1977 identified the average compensation for readers of *The Advocate*, a gay magazine, was approximately 50% above the national average. Weathers et al. (1979) revealed that gays oversaw an astounding 19% of spendable earning in the U.S. Ten years later, in 1988, Simmons reported the average per capita gay income of \$36,800 versus \$12,287 for the overall U.S. population, 60% compared to 18% when including college degrees, and 49% compared to 16% when considering executive or management positions. Gay travel alone is estimated to be a \$55 billion market (Boyd, 2008). In 2004

Forbes magazine estimated same-sex marriage, if legalized, could generate \$16.8 billion in wedding services (Boyd, 2008). Witeck-Combs Communications, a leading strategic marketing firm, estimates that the LGBT expendable net income will exceed \$835 billion in 2011 (Witeck-Combs, 2011). A second example is Toronto's Pride Parade, which is Canada's single most attended 1-day event, with crowd estimates exceeding more than 1 million people and an estimated \$60 million revenue for the city (Halpern, 2004). Finally, such exponential growth has given LOGO, the new GLBT cable channel, over 80 major brands as sponsors (Witeck-Combs, 2007).

Many authors argue that GLBT consumption is an insidious vehicle for civil rights (Boyd, 2008). That being said, companies operating in a free market must produce revenue to meet business objectives, e.g., paying employees. Many organizations have identified that the intersection of these ideas can be an impactful and profitable business opportunity. Specifically, organizations can make a profit while also making a contribution to society, often opening a new market niche for business. This concept has become known as Corporate Social Responsibility (CSR). At a fundamental level, CSR is a business concept which, instead of being focused solely on profits or the bottom line, is focused on a desire to be compassionate and have a value-based response to challenges facing society. Compared to other approaches in management, CSR is relatively new, having been discussed considerably only during the past 2 decades (Campbell, 2006). The data produced during this inquiry support the belief that creating a GLBT-inclusive work environment is meaningful CSR to stakeholders in particular, organization employees, the GLBT community, and greater society.

Social and political forces can fundamentally alter an industry's strategic environment. Companies have historically had a contract with society embracing stakeholders, customers, employees, and a broader set of shareholders (such as communities, media, academics, and the nonprofit sector; Bonini et al., 2006). Corporations may lead the way in social welfare issues, while at other times may follow the leadership of the community in which they operate. The successful organization builds social interests, such as protection of sexual minorities, into their strategic plans. Major corporations need to build social issues into business strategy in ways that reflect their actual business importance (Davis, 2005).

On the other side of the debate are those who argue that the business of business is business. This belief is most established in Anglo-Saxon economies. Within this view, social issues are peripheral to the challenges of corporate management. The sole legitimate purpose of business is to create shareholder value (Davis, 2005). Further, Nobel economist and libertarian Milton Friedman suggested that business has no social responsibility except to increase profits while refraining from deception and fraud (Friedman, 1970). Further, Friedman (1970) explained that when organizations seek to increase profits they almost always incidentally do what is good for the larger society.

The argument to not include social welfare in business fails for two specific reasons. Social issues are not so much peripheral to business practice as fundamental to it. A reactionary point of view establishes that companies that ignore public sentiment on social issues make themselves vulnerable to attack (Davis, 2005). In addition, social pressures can generate valuable market opportunities by highlighting unmet social needs

and new customer preferences (Bonini et al., 2006). These early indicators are core to corporate profitability and increasing market share.

CSR is an expansive organizational theory which has led to the emergence of several definitions of the theory (Mohr, Webb, & Harris, 2001). Johnston and Malina (2009) defined CSR as actions that appear to further some social good over and above what is required by law and encompassing the wide-ranging relationship of the organization with all constituents, including everyone from customers, to company personnel, to the competition. Campbell (2006) identified a commonly held definition of CSR as being actions taken by an organization that are intended to further social welfare outside the direct economic, technical, and legal interests of the organization. As defined by Harvard's Kennedy School of Government,

Corporate social responsibility encompasses not only what companies do with their profits, but also how they make them. It goes beyond philanthropy and compliance and addresses how companies manage their economic, social, and environmental impacts, as well as their relationships in all key spheres of influence: the workplace, the marketplace, the supply chain, the community, and the public policy realm.

For the purpose of this inquiry, CSR was defined as an organization's decision to use its resources to advance a social cause beyond what is expected by law or societal norms by actively managing its economic, social, and environmental impact.

As related to the findings of this study, CSR initiatives important to the GLBT community can have a positive impact to an organization's bottom line, thereby providing that organization with a positive return on investment. Several of the interview participants shared that their company's motivation to create a GLBT-inclusive work environment stemmed from believing it was the "right thing to do" in the absence of legal

guidelines, while also recognizing the positive impact on society that well-managed support of the GLBT community can constitute. As outlined in Chapter 4, interview participants stated that supporting the GLBT community made a positive impact on the company's bottom line. Specific examples included building future customers, recognizing that diversity and inclusion are drivers of business, and supporting the GLBT community in order to help overcome a disparity in society that is important for the organization to address.

Dutton and Dukerich (1991) found that employees in organizations actively monitor a company's actions on social issues as those actions can be (from an organizational perspective) character-enhancing or condemning. Recognizing this, organizations must pay attention to and manage their involvement in social issues to enhance the organization's image. A positive impact to the bottom line can be made by figuring out the underlying dynamics of the role of CSR in customer purchase decisions (Mohr, Webb, & Harris, 2001), e.g., GLBT people are more likely to spend their money at organizations that they feel are giving back to their community.

The research of Mohr, Webb, and Harris (2001) supported previous findings reported in the literature and proposes that a considerable, viable, and discernible market segment exists that considers an organization's level of CSR when making purchase and investment decisions. Therefore, to take advantage of this reality, organizations must work to advance social causes, such as supporting the GLBT community, that have the potential to increase profit. Businesses have an opportunity to appeal to this group while

at the same time meeting their business objectives and advancing a social cause in society (Mohr, Webb, & Harris, 2001).

During data collection, it became clear that many organizations simply felt that creating GLBT-equitable work environments was the “right thing to do.” Specifically, when asked what the primary motivational factor was for creating an inclusive work environment, several participants stated their organization did so solely because of internal beliefs. The literature supports these statements. Dunne (2008) wrote, “Over half a century of scholarly work in the area of corporate social responsibility now shows us, beyond any reasonable doubt, that corporations today require a moral compass” (p. 135).

A second reference in the literature suggests that organizations themselves make it clear that ethical behavior has a positive impact on business, and in contrast, human rights violations can cost an organization a great deal in potential litigation expenses (Harvard Law Review, 2009).

Organizations have several reasons to manage CSR effectively. First, it may be that incentives to make CSR a priority currently exist because organizations have internalized social responsibility into their day-to-day functions (Harvard Law Review, 2009). Second, as Sahlin-Andersson writes, CSR is “an extensive regulatory framework—predominantly voluntary, soft and self-regulatory. The media . . . have been visible in their treatment of CSR issues and have expanded both the audience and the group of active participants” (p. 95).

Lack of CSR can also increase risk to the organization. In particular, one study found absence of CSR may expose an organization to considerable additional risk from

lawsuits and reparations and can limit its strategic alternatives (McGuire, Sundgren, & Schneeweis, 1988). People consider an organization's behavior towards social causes when they interpret, react, and commit to organizational actions. Recognizing this, scholarly inquiry might attempt to better understand how companies behave by asking where people look, what they see, and whether or not they like what they see reflected (Dutton & Dukerich, 1991). Results suggest that reduction of risk is an important benefit to CSR (McGuire, Sundgren, Schneeweis, 1988), and therefore also relates to the aforementioned theme of positive return on investment.

The cost, both financially and to productivity, of noninclusive or discriminatory practices to GLBT people is astounding. Estimates indicate that 42,000 employees are dismissed each year due to sexual orientation, which results in an estimated cost of \$47 million (Van Den Bergh, 2003). As found in the literature, employee productivity can be significantly impacted by the work environment. A hostile work environment for GLBT persons is estimated to cost organizations \$1.4 billion each year (Poverny, 2000). Employee satisfaction can have a significant impact on the bottom line and culture of an organization.

Theme 2: Element of a Broader Diversity Initiative

During the participant interviews it became apparent that for several organizations, the motivation for creating a GLBT-inclusive work environment was an element of a broader diversity initiative. Specifically, creating a GLBT-inclusive work environment was not a stand-alone initiative but the result of a larger move to create an inclusive work environment for all employees.

Today's U.S. workforce is a montage of race, age, gender, religion, and sexual orientation. There is now more diversity among the workforce than ever before and this trend is predicted to persist well into the 21st century (Ivancevich & Gilbert, 2000). To maximize the skills and talents within an organization it is important to ensure harmonious integration of all employees. Managing diversity well can bring a competitive advantage to an organization and, conversely, if not managed well, it can lead to negative impact on an organizations' profitability. The underlying premise is that individuals are valuable and can be helpful in the achievement of organizational goals (Barry & Batemen, 1996; Van Hoya & Lievens, 2003). One of the components of diversity in the workplace is sexual orientation, which may be heterosexual, bisexual, or homosexual. Often sexual orientation represents a nonobservable or underlying type of diversity and in recent years has received a significant amount of increased attention (Van Hoya & Lievens, 2003). Numerous U.S. organizations are integrating diversity management into their HR practices and some companies are including sexual identity within their lists of chief sources of diversity (Day & Schoenrade, 1997).

Diversity of employees has been a significant HR issue for corporate America for decades (Davidson & Rouse, 2004). Indeed, many organizations have endeavored to embed the importance of diversity in their company culture. A diverse workforce also creates a daily challenge for many businesses (Van Hoya & Lievens, 2003). The increasing diversity and associated challenges have given rise to diversity management that works to create an environment where all persons feel good and develop themselves, regardless of their differences (Van Hoya & Lievens, 2003). The term diversity

management refers to the systematic and planned dedication of businesses to recruit, retain, reward, and encourage a heterogeneous mix of employees (Ivancevich & Gilbert, 2000). As organizations seek high-skilled employees, look to retain human capital, and seek the competitive edge, the impact of GLBT people in the workplace, like all minority groups, is clearly significant. To the HRD professional, the diversity initiative provides an opportunity to differentiate the organization from competitors and build competitive advantage. Overall the case for diversity is well established in the literature (Ivancevich & Gilbert, 2000). Creating a diverse workforce builds stronger constituent relationships, inclusive workplaces, enduring sustainability, and better decision making.

In addition, a growing number of businesses have created policies intended to recognize and affirm sexual orientation diversity in the workplace (Button, 2001). To understand this element of diversity management it is necessary to understand the specific work-related experiences and discrimination encountered by GLBT persons. As a result, both practitioners and scholars have called for additional research on the effects of sexual orientation in workplace-related issues (Button, 2001; Van Hove & Lievens, 2003).

When strategic HRD planning and implementation is inclusive of GLBT issues the organization is recognized as an innovative leader and sees a return on investment (ROI). Operational, or short term, planning is not going to provide a positive ROI and can lead to solutions that are shortsighted or that bow to short-term financial pressures and will ultimately do the organization more harm than good. A long-term, strategic plan that includes the protection and inclusion of sexual minorities will result in an increased

return on investment (ROI), increased market share, and will be difficult for competition to imitate. As cited by the HRC (2008c) corporations that offer protection for transgender employees are ahead of the curve on evolving local, state, and federal laws.

Theme 3: Internal Organizational Pressure

A significant theme that emerged from this inquiry related to internal organizational pressure to create GLBT-inclusive work environments. Two subthemes within this major theme include: (a) a formal request from the GLBT employee resources group, and (b) a formal request from senior leadership of the organization.

Formal request from employee resource group. This subtheme has several significant references across multiple interviews. As outlined in Chapter 4, compared to the other themes this theme didn't emerge with concrete examples provided by the interview participants. Statements by participants indicated that their understanding was based on conversations with others at their organization rather than direct experience. Instead of concrete examples, stories emerged that indicated the GLBT ERG had made a formal request to senior leadership to create a more GLBT-inclusive work environment. This request, according to the stories, motivated the company to change HR policy to create a GLBT-inclusive working environment. Participants often noted that they could not provide specific examples because these actions took place before their employment with the organization.

Employee Resource Groups (ERGs) are a significant asset to organizations, creating a welcoming and encouraging culture for minority or underrepresented employees. GLBT-focused ERGs can provide visibility and significantly advance an

organization's ability to create a GLBT-inclusive work environment. Fundamentally, these ERGs focus on retention and development of GLBT employees. In addition, these ERGs can also advance and provide insight on important organizational initiatives related to the GLBT community, consumers, and other company ventures. As noted by the HRC (2010; p. 18) 78% of CEI-rated companies have an employee resource group or diversity council that includes GLBT topics.

GLBT employees often create formal and informal employee groups at organizations to provide social and networking opportunities, to advocate for policy changes, and to find ways to support one another. At many organizations employee resource groups advocated for years to create equitable work environments. Often these groups become formal employee resource groups (ERGs) that are recognized, supported, and that engaged with organization management. To be supported, ERGs are typically expected to improve organizational effectiveness or increase competitive advantage (Githens & Aragon, 2009). These GLBT ERGs can be found across sectors, organized in various ways, and serving multiple purposes (Githens & Aragon, 2009). The number of GLBT ERGs has grown considerably in the past 30 years. In 1980 only 2 Fortune 1000 organizations had GLBT ERGs, by 1998 a total of 69, and by 2010, 78% (HRC, 2010). When ERGs work well, they have the potential to foster an inclusive workplace environment that helps the employer by increasing productivity and organizational effectiveness (Githens & Aragon, 2009). The Corporate Equality Index (CEI; see Table 3) awards 15 points for having a GLBT Employee Resource Group/diversity council, or gives half credit if the organization would support a GLBT ERG (HRC, 2010).

Senior leadership. Contradicting the aforementioned theme, a considerable segment of the interview participants noted that several organizational changes to create GLBT-inclusive work environments occurred not because of an ERG request but because of the recommendations of senior leadership. This theme draws attention to the belief that a company's senior leadership felt that creating an equitable work environment for GLBT people was simply, the "right thing to do." Decisions made within this theme were not motivated by a grass roots initiative or compelled by a GLBT ERG, or even by simply moving a diversity initiative forward. Instead, findings within this theme focus solely on the decision of a senior leader of the organization.

In addition to the findings of the inquiry, the literature also supports this theme. Bell, Özbilgin, Beauregard, and Sürgevil (2011) suggested that under the current contentious and politicized environment, proactive leaders should implement policies and practices that advocate equality in the workplace, especially in the absence of legislation. One bona fide example discussed in the literature cites the senior leadership of the United Auto Workers (UAW), who, shortly after merging with the National Writers Guild, expressed support for equal treatment of GLBT people, asking the union to address sexual orientation (Bielski, 2010).

Theme 4: Parity with Other Companies

This theme is based on the premise that organizations sought to create GLBT-inclusive work environments in an effort to find parity with other companies based in Minnesota. This theme can also be subdivided into three supporting pieces: (a) organizations wanted parity due to competition in Minnesota for skilled employees, (b)

companies wanted to create a GLBT-inclusive work environment but didn't want to lead the movement purposefully, but rather making the move at the same time as other Minnesota organizations, and (c) organizations in Minnesota consulted, supported, and at times competed with each other throughout the process in an effort to find parity with each other.

In today's business environment competition for skilled employees is a significant challenge for many organizations. As noted by several of the interview participants, one of the primary reasons their organizations seek parity is due to competition for top talent and retention of their current employees.

Within the literature it is recognized that GLBT persons commonly seek employment with businesses that prohibit sexual orientation discrimination (Van Den Bergh, 2003). In today's competitive business environment the field of HRD is changing at an astounding pace and organizations are under immense pressure to reorganize themselves and their human resources policies. Several causes can be attributed to this rapid change. Gilley and Maycunich (2000) suggested competition, globalization, continuous change in markets, and cost effectiveness are all forces that contribute to change in the field. Competition from regional to worldwide organizations is becoming more and more intense, which causes organization leaders to increasingly recognize that employees are resources that must be sustained and developed (Swanson & Holton, 2001). As Van Den Bergh (2003) wrote, "In a service, postindustrial economy where the demand for qualified employees exceeds the supply, firms are advantaged by creating a welcome and inclusive workplace for sexual minority employees" (p. 62). Further, Gilley

and Maycunich (2000) cited recent studies that establish human resources as a significant contributor to competitive advantage. Hence, organizations are seeking ways to attract talented employees. Because GLBT persons embody a considerable portion of the work force, approximately 3% to 5%, it is imperative to enhance their interest to the organization (Van Hove & Lievens, 2003).

The cost, both financially and to productivity, of noninclusive or discriminatory practices toward GLBT people is astounding. Estimates indicate that 42,000 employees are dismissed each year due to sexual orientation which results in an estimated cost of \$47 million (Van Den Bergh, 2003). As found in the literature, employee productivity can be significantly impacted by the work environment. A hostile work environment for GLBT persons is estimated to cost organizations \$1.4 billion each year (Poverny, 2000).

Theme 5: Fortuitus Chance

Merriam-Webster (2011) defined chance as something that happens unpredictably without discernible human intention or observable cause. My research revealed an unexpected theme indicating that some decisions to construct HRD policies and practices to create GLBT-inclusive work environments happened by chance. Central to the theme of chance is that the motivational factor, as outlined by this inquiry, simply didn't exist for the organization. Instead, the decision was completely unrelated, lacking any human intention to create a GLBT-inclusive work environment.

Several principal reasons may explain this phenomenon. First, a unified purpose for creating a GLBT-inclusive work environment was not apparent. It is plausible that organizations moved forward to change policy and practice without articulating a

specific, strategic need, just letting it happen without communicating a goal to employees. Second, organizations can be extremely complex; especially large Fortune 500 companies included within this study. Companies are comprised of distinct staff with assorted interests, making unified purpose and consistent decision making seem improbable. Also related to the complexity of organizations, organizational structures and processes can lead to deficiencies that either keep or allow the pieces to come together without an articulated plan to do so. Third, the organizations may have fundamental deficiencies that keep them from putting it all together, e.g., separate units may not communicate effectively with each other. Another example may be fragmentation; the results could be the product of lapses or omissions that compound into a major policy or practice which cannot be clearly attributed to a person, decision, or unit. The impact of this finding is significant. If organizations do not always act in a rational, planned manner, then OD interventions to change the organization will not achieve desired results.

Summary

Within this chapter, I have sought to relate the findings of the document review and interview data with support from the literature. Five significant themes were discussed in detail. Those themes are: (a) positive return on investment, (b) element of a broader diversity initiative, (c) internal organizational pressure, (d) parity with other companies, and (e) fortuitous chance. After each theme was presented, the literature was reviewed. The five themes, complemented by the literature review, lead to the discussions in Chapter 6.

CHAPTER 6

Discussion

For this case study I documented and analyzed the motivational factors of Minnesota's Fortune 500 organizations to create GLBT-inclusive work environments. This chapter starts by outlining the major findings of the inquiry. A discussion of the major findings is followed by restating the limitations of the study and implications for practice. Finally, calls for further inquiry and a summary of contributions of this work are presented.

Summary of the Major Findings of this Study

The major themes of this study identify five motivating factors for Minnesota's Fortune 500 companies to create GLBT-inclusive work environments. These themes are: (a) positive return on investment, (b) element of a broader diversity initiative, (c) internal organizational pressure, (d) parity with other companies, and (e) fortuitous chance. See Table 10 for a visual outline of the findings. In an effort to summarize them, one quotation from the participant interviews has been chosen that speaks appropriately to each individual theme.

Positive Return on Investment (ROI)

This central finding is that companies found a return on investment (ROI) that positively impacted the organizations' bottom line. The two subthemes identified within this theme are: (a) increased productivity, job satisfaction, employee retention, and (b) the perspective that it directly related to the company's core business function. Overall, participant interviews revealed critical factors that support this theme. Participants

described ways in which creating a GLBT-inclusive work environment helped retain employees and helped to create a favorable recruiting environment for prospective employees. In addition, participants shared ways in which they believe their company's inclusive work environment increased productivity by creating a climate where all employees felt they could bring their whole selves to work. One participant in particular summarized this theme well,

Diversity and inclusion is a driver of business. It drives innovation, it drives . . . an inclusive work environment, it drives engagement within our business. The more engagement you have, the more innovation you have, the better your business does. We know having a diverse population means better innovation. We know that having higher employee engagement means that we are getting more return on our value from every employee and we can't do those things unless we are being inclusive.

Element of a Broader Diversity Initiative

This theme is characterized by the belief that creating a GLBT-inclusive work place was a component of the company's broader diversity initiative. Specifically, creating a GLBT-inclusive work environment was not a stand-alone initiative but the result of a larger move to create an inclusive work environment for all employees. As one participant shared,

You know what, it just evolved, it wasn't part of any specific area or dimension of diversity. It was just, well, a why wouldn't we kind of thing. Why wouldn't we? Of course we are going to be inclusive and it isn't, you know, GLBT isn't that inclusive. Yes it is, so what about religion, so yes, it is. We need to be inclusive. So it wasn't really called out as a decision specifically, it was just almost more all-inclusive.

Internal Organizational Pressure

This theme related to internal organizational pressure to create GLBT-inclusive work environments. Three subthemes within this theme include: (a) grass roots initiative,

(b) a formal request from the GLBT employee resources group, and (c) a formal request from senior leadership of the organization. Several of the interview participants noted that changes in company culture, HR practices, and ways in which GLBT employees are recognized at their organization fundamentally started as part of a grass roots initiative. In reference to the motivation being a grass roots initiative, one participant stated the following,

I know that [our company] isn't this bad [in reference to score on CEI]. I know we have partner benefits, I know we have a lot of good things. This [the CEI] is a reference for, you know, people who are job shopping that are gay and lesbian so then [once pointed out to HR] took that to upper leadership who said, yeah, that is terrible. Move on it.

Crediting an Employee Resource Group (ERG) one person asserted the following,

It was around 1990, somewhere in '94 to '96, and it was certainly led by our affinity group. There was an appetite for it but we needed that one person to stand up and drive, and at that time the chair of the affinity group [ERG]. . . she's been an advocate in the community at large so she's already familiar with, you know, everything from the HRC to Out and Equal, to Quorum, and she really had that drive and that business knowledge to attack it.

One last participant quotation credited senior leadership as the motivation stating,

The one thing that I can think of that came from the top down versus the bottom up was the overall commitment. When there have been questions of – you know, are we going to continue to remain at 100 [on the CEI] all the time regardless of what the survey [requires]? Or, you know, what is our commitment level? That really came from the top down. The top down said we are committed to this. There is not a question.

Parity with Other Minnesota Companies

This theme is based on the premise that organizations sought to create GLBT-inclusive work environments in an effort to find parity with other companies based in Minnesota. Although this theme was not originally anticipated, it emerged early and was

significantly supported by the participant interviews across several organizations. The following statement from an interview participant summarized this theme well,

[Our] organization is motivated by parity with other companies. We don't want to be a leader, but we want to be in the pack. Okay. And you know what? I like where the pack is, so I can use that, and I did. I don't know if it worked or not, but you know if I can go ahead and say, well we'd like family medical leave benefits because General Mills and, you know, these six other companies around town have it. And by the way, here is a copy of General Mills' policy and, you know, if that works, I am fine with that.

Fortuitous Chance

A noticeable theme that emerged from this inquiry was that chance, an unpredictable element, played a key role in creating some GLBT-inclusive work environments. Central to the theme of chance is that the motivational factor, as outlined by this inquiry, simply didn't exist. Instead, the decision was completely unrelated to the motivation for creating a GLBT-inclusive work environment. In describing how transgender health benefits became part of an organization's benefits offering, one participant shared the following—I believe the statement illustrates this theme well:

There are a couple things that we score well on, on the CEI, where a lot of people didn't. It is just because it just kind of happened. It makes us [our company] look like leaders but it just kind of happened. Like one of them was [how our HR records system] defaults. And of course it means defined [to married same-sex spouse] which by most companies those are challenges [to change]. Our default was, you have to sign somebody up [anyone] so there is no default. Well, you know, that makes it easy. It looks like we are leaders then and in some ways I think we are doing pretty well.

Conclusion

My findings resonate with a number of related studies on GLBT persons in the workplace (Brenner et al., 2010; Giuffre, Dellinger, & Williams, 2008; Githens & Aragon, 2009). However, this study focused exclusively on what motivates organizations

to create GLBT equality in the workplace. To my knowledge this topic has not yet been studied within the literature.

Restatement of Limitations

In trying to understand the motivational factors behind Minnesota's Fortune 500 organizations to create equitable work environments for GLBT people I have attempted to accomplish much in this inquiry. It is my sentiment that I have studied these phenomena thoroughly with considerable rigor worthy of a Ph. D. dissertation from a Tier 1 research university. That being said, there are limitations to this study which offer opportunities for further inquiry.

First, in terms of research design, the case study methodology does not allow these findings to be used to draw conclusions about other organizations. This inquiry is limited to understanding only the organizations found within the study. It cannot be compared to, for example, Fortune 500 organizations in California.

Second, included in the research design were sample size and framework, i.e., Fortune 500 organizations in Minnesota that score well on the HRC's Corporate Equality Index. While these organizations were most desirable for the study, it is difficult to draw comparisons with smaller organizations not ranked in the Fortune 500.

A third limitation is that 1 of the 2 primary means of data collection was through interviews. It is possible that the individuals could be mistaken in their answers to questions about the motivations of their employing organization to create GLBT-friendly work environments.

Fourth, these conclusions are not intended to be read as the only feasible interpretation of the data, but instead are intended as an interpretive understanding on the basis of careful analysis of interviews and organizational documents reviewed over several months. Lastly, the sample set was focused on 3 specific organizations and may not represent the full range of industries found in Minnesota's Fortune 500 organizations.

Finally, a limitation of this study is that it is based solely on available data published by each organization for a distinct purpose different from that of this study. It should be recognized that secondary data cannot always be considered accurate or current (Cunningham et al., 2009). Further, using statements found online means that these were written for public consumption which may reflect where a company wants to be, not where it actually is.

Implications

The practical nature of this inquiry provides several implications related to the findings of why Fortune 500 companies in Minnesota have created GLBT-inclusive work environments. It should be recognized that the several of the findings of this inquiry relate directly to the profession and practice of HRD. Limitations are divided into two related but separate categories: implications for research and implications for practice. A prominent contribution of this inquiry is to help to bolster our understanding of what motivates Fortune 500 organizations in Minnesota to create GLBT-inclusive work environments. In addition to existing literature, this inquiry helped to expand our understanding of the broadening focus of HRD. As noted, several of the implications of this inquiry are tied to the theoretical underpinning of HRD and scholarly inquiry of the

field. The findings of this inquiry relate to the practice of HRD in several ways; therefore they have several important implications including: (a) training programs (specifically GLBT/diversity training), (b) organizational effectiveness/OD interventions, and (c) the importance of adding sexual orientation to nondiscrimination laws.

A theme that emerged throughout the participant interviews was the importance of Corporate Social Responsibility (CSR). In the field of HRD, recent voices have called for a broader focus within HRD. Particularly, Lee (2007) and O'Donnell (2007) called for a broad sensitivity to societal issues in HRD practice that exceeds basic practices and policies like diversity and labor laws. Jacobs (2006) suggested that a lesson should be learned from ongoing changes in the field, that they are part of larger societal change, and thus, fields of inquiry (in adult education and HRD) must be adjusted based on societal need. An implication of this inquiry is a call for broadening the focus of HRD studies to advance our understanding of the intersection of HRD and societal issues such as the topic of this study.

As described by the HRC, diversity training programs are valuable vehicles through which an organization can communicate expectations of equality to its employees (HRC, 2010). As supported in the literature, diversity and inclusion training should include sexual orientation because doing so increases awareness while decreasing misperceptions (Bell et al., 2011). Some authors even suggested using current gay and lesbian employees as teachers (Bell et al., 2011). Diversity training is an important piece of organizational development. Studies have verified that cultural diversity training increased employees' perception of the importance of diversity for the organization and

decreased their perceptions that minorities get too much attention. It also reinforced the belief that the organization is concerned with their personal growth (Ellis & Sonnenfeld, 1994). These recommendations and the findings of this inquiry imply that the practice of HRD should highlight the importance of GLBT-focused diversity training.

Improving organizational effectiveness is very important in HRD and, as demonstrated by this inquiry, improving organizational effectiveness was a primary motivational factor for organizations to create GLBT-equitable work environments. Numerous HRD scholars focus only on organizational effectiveness as the single or primary purpose of HRD (Cummings & Worely, 2005). By applying theories of HRD to the study of GLBT equality in the workplace, this study demonstrates how HRD can contribute to organizational change to create better workplaces.

Bell et al. (2011) framed it well,

Being forced to remain closeted, living with the fear of being terminated, and lack of partner benefits are just a few of the concerns unique to GLBT employees. Supporting human resource management practices that encourage openness and reject discriminatory practices, however, can make the difference. (p. 133)

A variety of HRD interventions can assist in making the workplace better for GLBT persons. The first step in creating a friendly work environment for GLBT persons is to create a framework of policies and practices that address sexual orientation and gender identity discrimination. Specifically, every organization needs to write an antidiscrimination policy, including procedures for preventing and addressing discrimination within their organization (Van Den Bergh, 2003). Further, the organization should explicitly prohibit harassment based on sexual orientation in the organization's harassment policies and procedures (Van Den Bergh, 2003). In the

absence of a statement of nondiscrimination, GLBT persons should face the prospect that they could be terminated for their sexual orientation.

Throughout the literature significant OD/HRD interventions were identified that potentially make the workplace better for GLBT persons:

1. Top organization leaders articulating the need for a safe and inclusive working environment for GLBT employees (Van Den Bergh, 1999).
2. Diversity awareness training that includes GLBT-specific topics (Button, 2001; Van Den Bergh, 1999).
3. Inviting and welcoming same-sex partner to organization events (Van Den Bergh, 1999).
4. Organization mission statements or formal statements of nondiscrimination based on sexual orientation of employees, clients, and customers (Button, 2001; Van Den Bergh, 1999).
5. Developing “safe zones” where GLBT persons feel accepted for their sexual orientation (Van Den Bergh, 1999).
6. Establishment of GLBT employee networks (Button, 2001; Van Den Bergh, 1999).
7. Extension of benefits to same-sex domestic partners (Button, 2001).

A consequential ramification of this inquiry is that by choosing to create GLBT-inclusive work environments in the absence of state or federal regulations, organizations demonstrate significant meaning to employees. As documented in the literature, policy decisions over the past 3 decades suggest that the U.S. is moving towards prohibiting

employment discrimination on the basis of nonproductive characteristics (Badgett, 1995). When policies and practices are implemented to advance equality the organization speaks volumes to employees about its commitment to diversity and inclusion (Bell et al., 2011) This being the case, an implication is the need for adding sexual orientation to nondiscrimination laws (Badgett, 1995).

Further Inquiry

This inquiry has only begun to provide a deep and significant understanding of the complexity of motivational factors to create GLBT-inclusive work environments. Recognizing this, it is important that additional scholarly inquiry on the topic is conducted.

Since this inquiry focused solely on Minnesota companies that are recognized as creating a GLBT-inclusive work environment, an opportunity exists to study just the opposite. Giuffre, Dellinger, and Williams (2008) recognized that ‘safe’ and ‘hostile’ organizations exist in today’s work environment. Significant insight related to this inquiry could be found by studying the impact that a hostile environment to GLBT employees has on a company’s bottom line. Further, are companies that are hostile to GLBT employees at higher risk as related to corporate social responsibility?

Studying the impact of environment and location on the motivational factors of an organization to create an inclusive work environment is also a noteworthy inquiry. An important message from this study, supported by emergent themes, is that organizations are complex. Several of the interview participants also recognized that at their large organization, the day-to-day experience for GLBT employees could vary greatly

depending on location. Specifically, these comments focused on the environmental differences between working at corporate headquarters, often located in urban environments, versus at production facilities, often located in rural environments. As noted in the literature, specific examples can demonstrate that research focused on the type or makeup of a union's membership to predict openness to sexual diversity may be misplaced and discounts the role of outside influences (Boris, 2010). Environmental differences related to this phenomenon are worth further research and inquiry.

Hearn and Parkin (1987) identified three ways in which heterosexual privilege is reproduced in the work environment through policies that privilege traditional families, norms that discourage discussion of GLBT relationships, and interactions that stigmatize homosexuality. During my inquiry I was able to see through the eyes of my interview participants and heard numerous references to this kind of heterosexual privilege. Given this, it is my belief that a rich and fruitful opportunity exists for Hearn and Parkin's theory to be explored much more deeply.

Future research in this area could also include a focus on the interconnectedness of human capital (employees) and their perceptions of organizational ethics and Corporate Social Responsibility (CSR). Conducting interviews with company employees focused on this topic has the potential to yield significant and insightful implications for today's organizations.

In closing, I suggest two alternative quantitative methodologies of inquiry that may provide significant insight on this phenomenon. First, one could develop a study focused entirely on the effect on organizational performance of creating GLBT-inclusive

work environments. This study could also consider the actual cost saving to an organization for creating an inclusive work space. Second, a study could be done to better understand the role of organization behavior in creating an inclusive work environment related to industry, firm size, and Fortune 500 rank. These questions were outside the scope of my inquiry but during my research I recognized the importance of studying these further.

The economic impact of creating a GLBT-inclusive work environment should also be studied further. While reviewing the literature I was only able to identify one study that focused on the effect of sexual orientation diversity management on an organization's stock market performance (Wang & Schwarz, 2010). Given management's focus on stock market and shareholder returns more inquiry into this topic is needed. Further, several of the themes that emerged within this inquiry support the premise that creating a GLBT-inclusive work environment provides a significant ROI to an organization.

Researcher's Role

Currently I am a doctoral student in the Organizational Leadership, Development, and Policy program, with an emphasis on HRD, at the University of Minnesota. I have pursued my academic career part time while working full time at the Carlson School of Management at the University of Minnesota. Within this study, the population involves organizations that I have not worked for previously. However, in my professional role at the Carlson School, I have had the opportunity to meet employees of organizations within the studied population and build a rapport of trust. This rapport with employees from

these organizations allowed me to leverage those relationships and increase the likelihood of access to the parties whom I wish to interview. My doctoral committee, my strong desire to reduce bias, a solid analysis, and personal knowledge have provided a strong foundation for this qualitative study.

The research question guiding this inquiry was: What motivates Minnesota's Fortune 500 organizations to create GLBT-friendly work environments? To find the answer to this question, I relied on qualitative methods consisting of a multiple case study. This required interviews and a document review across several organizations. Companies were selected according to criteria that guaranteed that participating organizations had already created a GLBT-equitable work environment.

Summary of Contributions

Despite the limitations outlined above, this inquiry has developed several contributions to the literature on the motivations to create a GLBT-inclusive work environment. Overall, the results of this study, possibly for the first time, demonstrate significant rationales as to *how* organizations create a GLBT-inclusive work environment and *why* organizations choose to make this a priority. Since similar inquiries have not been completed previously, this study makes a significant dent in the literature and greatly increases our understanding of the topic. It is my hope that the practical impact of this inquiry can help organizations that have not created an inclusive work environment and remove the myths from discussions on this topic.

Concluding Summary

Only recently have America's largest organizations, such as the Fortune 500, spent significant resources on creating GLBT-inclusive work environments, and the progress is far from complete. Overall, these findings suggest that Minnesota's Fortune 500 organizations are motivated to create GLBT-inclusive work environments for several reasons (a) positive return on investment, (b) element of a broader diversity initiative, (c) internal organizational pressure, (d) parity with other companies, and (e) fortuitous chance. This study makes valuable contributions to the scholarly literature on HRD and GLBT persons in the work place.

In conclusion, I hope this inquiry directs greater attention to the current debate concerning the rights of GLBT people in today's workplace. This study offers an initial attempt to advance the understanding of the motivation behind an organization's decision to create an inclusive work environment for GLBT persons. This research also complements the understanding of the rewards for creating an inclusive work environment. It is my hope that this inquiry serves as a stepping stone for additional study to advance our understanding of the intersection of HRD, GLBT employees, and the work environment. As HRD professionals and organization leaders address critical and difficult components that relate to creating a GLBT-inclusive work environment, I hope that the information found within this inquiry can be applied in a practical way to benefit GLBT employees and the organizations they work for.

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APPENDIX A

Case Study Protocol

What Motivates Minnesota's Fortune 500 Companies to Create Equitable Work Environments for GLBT People

Introduction

Due to rapidly changing social movements U.S. organizations are paying increasingly more attention to gay, lesbian, bisexual, and transgender people in the workplace. Organizations are now ranked and evaluated by national organizations such as the Human Rights Campaign Foundation (HRC) on the inclusion, policies, beliefs, and treatment of their gay, lesbian, bisexual, and transgender (GLBT) employees. These factors, combined with the larger GLBT social movement, have caused many organizations to invest heavily on initiatives to create equitable work environments for GLBT people. Developing and adapting Human Resource (HR) policies and practices to accomplish this is difficult, time consuming, and costly to organizations—which begs the question; without federal or state mandate, and at risk for public condemnation, what motivates organizations to create equitable work environments for GLBT people? The purpose of this study is to investigate the motivational factors for Fortune 500 organizations in the state of Minnesota to spend significant HRD resources to create equitable work environments for GLBT employees.

Case study questions, hypothesis, and propositions

- This study seeks to understand why Fortune 500 organizations in Minnesota have chosen to spend significant HRD resources to create equitable work environments for GLBT people. The following sub questions will help guide the inquiry: (a) do organizations find a return on investment (ROI) for providing an inclusive work environment for GLBT employees? and (b) from an employee's perspective what are the benefits to the organization for being GLBT inclusive? It is important to recognize that these research questions are presented as an initial starting point and additional questions will develop during the inquiry.

Theoretical framework for the case study

- From a methodological perspective the case study is best suited for inquiry on this phenomenon. Case studies typically answers questions like “how” or “why” and are used to study contemporary phenomenon in a real-life context where the researcher has little control (Yin, 2009). A type of empirical inquiry, the case study looks intensely at a program, an event, an activity, a process, or one or more individuals (Stake, 2005) drawing conclusions on the phenomena only in that specific context. From an epistemological perspective the case study is rooted in qualitative research. Case study inquiry is an accepted form of inquiry and has been used in a range of explorations, particularly in sociological studies (Tellis, 1997; Yin, 2009). In using case study methodology, researchers do not focus on the discovery of a generalizable truth and typically avoid cause-effect

relationships; instead importance is placed on discovery and description. Case study is the ideal methodology when a holistic, comprehensive investigation is needed and can be quantitative, qualitative, or both (Yin, 1994). The case(s) are bounded by time and activity, and researchers collect detailed information using a variety of data collection procedures over a sustained period of time

- Case study designs can be single or multiple case inquiries. Since this inquiry seeks to understand motivational factors across multiple Fortune 500 organizations in the State of Minnesota a multiple case study would yield the best insight into the phenomena.
- To research the motivational factors behind Minnesota's Fortune 500 organizations to equitable workplaces for GLBT persons a collective (multiple) case study is most appropriate. Multiple authors (Stake, 1995; Yin, 2009) have agreed that collective case study is most suitable to investigate a concept for which there has been little research within the context.
- The collective case study is an endeavor to look into a phenomenon in a variety of settings under the expectation that the study leads to an enhanced understanding of similar settings (Stake, 1998). This epistemic approach also aligns with a collective case study as multiple cases are required to reveal similar or contrasting results of this phenomenon (Yin, 2009). Lastly, multiple cases provide a richness of detail appropriate for the theoretical underpinnings of this study.

Role of protocol in guiding the case study investigator

- This case study protocol is a standardized agenda that outlines my line of inquiry to study this phenomenon. That being said, in the framework and spirit of qualitative research built into this protocol is the ability of the research protocol to be flexible to allow the discovery of pertinent information that emerges during the inquiry.

Data collection procedures

Data will be collected using the following criteria from these organizations

- Minnesota has 21 Fortune 500 Organizations. Of these 21 organizations 14 have participated in the CEI and have corresponding scores. Participant organizations were identified on the basis of: (a) have a CEI score of 100 or above, (b) be located in Minnesota, and (c) demonstrate (if possible) an increase in scores over the past 4 years; CEI indexes of 2006, 2008, 2009, and 2010. Using these criteria (see Table 4) 11 organizations were identified: 3M, Ameriprise Financial, Best Buy, General Mills, Medtronic, PepsiAmericas, Supervalu, Target, United Health Group, U.S. Bancorp, and Xcel Energy.

Data collection plan

- Interviews were conducted with organization leaders instrumental in developing the GLBT inclusive policies of the organization and employees who are long

standing members of the organization's GLBT group. Senior HRD leaders were selected as they are the most likely to provide reliable information regarding the motivational factors behind creating GLBT equitable work environments. Additionally, employees who are members of the organization's GLBT group are well suited to answer interview questions exploring the sub question; from an employee's perspective what are the benefits to the creating an equitable work environment for GLBT persons?

- The document review focused on the organizational mission, Equal Employment and Opportunity (EEO), and diversity statements from each of the 11 number of Fortune 500 Minnesota companies that scored a 100 on the Corporate Equality Index (CEI).
- A researcher journal, created in NVivo, was consistently and extensively used as a way to contribute to data and rigor of the study.

Expected preparation prior to visits

- Immediately after someone accepts my request to participate and an interview has been scheduled I follow up with three specific documents: (a) consent form, (b) list of proposed questions, and (c) confirmation of the date, time, location, and that the interview will be recorded.
- Each interview is anticipated to last 1–1½ hours. Open-ended, semistructured interview question will be used to extract each participant's insight.
- Bring interview guide, two copies of consent form, and recording materials to the interview.

Case study questions

The semistructured interview will use the following questions as a guide. Additional questions may be asked for clarification, more detail, or to further inquire on the topic.

1. What is your role within the organization?
2. How does GLBT diversity currently fit within the overall diversity strategy within your organization?
3. Does your organization have an employee advocate group for GLBT employees?
 - a. What is the name of that group?
 - b. What can you tell me about the purpose or mission of this affinity group?
 - c. How often does that group meet?
4. Are you familiar with the Corporate Equality Index (CEI) published by the Human Rights Campaign?
 - a. Do you know what your organization scores on this measurement?
 - b. Does your organization share the results of the CEI with employees? If yes, how so?

5. At some point your organization made a decision to be GLBT inclusive—what can you tell me about that process?
 - a. Do you know when that was? (approximate is acceptable)
 - b. Who lead that process? HRD? Employee affinity group?
 - c. Was the business decision to include GLBT diversity within the organization’s strategy a “top down” decision or encouraged from others within the organization?
6. What would you identify as the motivational factors behind your organization’s move to create a GLBT inclusive work environment? Of these, which motivational factor do you feel was the strongest?
7. Do you feel the (insert employee advocate group name) had a significant role in shaping an inclusive work environment?
 - a. Can you provide specific examples?
8. Are you aware of any costs associated with creating and maintaining equality in policies and practices for GLBT employees?
 - a. If yes, what are these costs associated with?
 - b. And how much do you estimate these costs to be?
9. How valued do you feel GLBT employees feel within your organization?
 - a. Do you feel the CEI score of your organizations impacts this?
10. Are there any questions you think I should have asked?
11. Is there anything you would like to add?

Outline of case study report

- The final outline of this inquiry will be a six-chapter dissertation of high quality appropriate for publication from a Tier 1 research university. The dissertation will contain (among other items listed below): (a) an exhaustive pre and post data collection literature review, (b) research design and methodology, (c) findings and analysis, and (d) discussion and results.
 1. Introduction
 - a. Purpose of study
 - b. Importance of the problem
 - c. Statement of the research question
 - d. Key terms and concepts
 2. Literature review
 - a. Historical influences
 - b. Legislation

- c. HRC Workplace Project and Corporate Equality Index
- 3. Research design and methodology
 - a. Inquiry framework
 - b. Study design
 - c. Instrumentation
 - d. Ethical considerations
 - e. Strengths and weaknesses
- 4. Findings and analysis
 - a. Data collection
 - b. Data analysis
 - c. Themes
- 5. Discussion and results
 - a. Restatement of limitations
 - b. Data findings and analysis
- 6. Conclusions
 - a. Summary of major findings
 - b. Implications
 - c. Suggestions for further inquiry
 - d. Summary of contributions important to HRD

APPENDIX B

Interview Guide

Step 1—Introduction

This study seeks to understand why organizations have spent significant HRD resources to create equitable work environments for GLBT employees. Although data collected for this study is confidential I ask that you do not reveal anything that you are uncomfortable discussing. During the interview, if you are in doubt about whether to reveal something, please choose to be cautious and not reveal that information. This interview should not exceed 1 hour in length. Before we begin I wish to verify three items:

- Your participation is voluntary and you can choose to stop and remove yourself from the interview at any time. There is no penalty for not participating.
- Is it clear that I would like to ask questions about your organization's process and motivation to create equitable work environments for GLBT employees?
- Do you understand that I will not reveal to anyone what you have told me, and I will report my results in a confidential way that will not reveal who said what to me?

Step 2—Consent Form

The first step in the process is to review the consent form. I'll have you sign one copy of the form and also provide you a copy for your own records. The consent form outlines the research question, risk and benefits to participating, confidentiality of study and contact information. (*Review the consent form in detail and allow for questions and ask participant to sign*).

Step 3—Interview

Interview will begin with turning on the recording device and selecting "record." The first audio entry will be made stating the date, time and the person being interviewed. The semistructured interview will then commence using the following questions as a guide. Additional questions may be asked for clarification, more detail, or to further inquire on the topic.

1. What is your role within the organization?
2. How does GLBT diversity currently fit within the overall diversity strategy within your organization?
3. Does your organization have an employee advocate group for GLBT employees?
 - a. What is the name of that group?
 - b. What can you tell me about the purpose or mission of this affinity group?
 - c. How often does that group meet?
4. Are you familiar with the Corporate Equality Index (CEI) published by the Human Rights Campaign?
 - a. Do you know what your organization scores on this measurement?
 - b. Does your organization share the results of the CEI with employees? If yes, how so?

5. At some point your organization made a decision to be GLBT inclusive—what can you tell me about that process?
 - a. Do you know when that was? (approximate is acceptable)
 - b. Who lead that process? HRD? Employee affinity group?
 - c. Was the business decision to include GLBT diversity within the organization’s strategy a “top down” decision or encouraged from others within the organization?
6. What would you identify as the motivational factors behind your organization’s move to create a GLBT inclusive work environment? Of these, which motivational factor do you feel was the strongest?
7. Do you feel the (insert employee advocate group name) had a significant role in shaping an inclusive work environment?
 - a. Can you provide specific examples?
8. Are you aware of any costs associated with creating and maintaining equality in policies and practices for GLBT employees?
 - a. If yes, what are these costs associated with?
 - b. And how much do you estimate these costs to be?
9. How valued do you feel GLBT employees feel within your organization?
 - a. Do you feel the CEI score of your organizations impacts this?
10. Are there any questions you think I should have asked?
11. Is there anything you would like to add?

Step 4—Conclusion and Thank you

Thank you for your time and willingness to participate in this interview. Following the interview the audio tapes will be transcribed to written form. After the interviews have been transcribed the tape recordings will be returned to the interviewee (additional copies will not be made). The researcher will keep in confidence, and in a secure location, the transcription of the audio tapes. I greatly appreciate your willingness to participate. Please do not hesitate to contact me with questions.

Contacts and Questions: The researcher conducting this study is: Brent Opall. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact him at the University of Minnesota, 612-626-4088, opall001@umn.edu. *(The faculty advisor to this study is Dr. James Brown, brown014@umn.edu, 612-624-7754.)* If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher(s), **you are encouraged** to contact the Research Subjects’ Advocate Line, D528 Mayo, 420 Delaware St. Southeast, Minneapolis, Minnesota 55455; (612) 625-1650.

You will be given a copy of this information to keep for your records.

APPENDIX C

Research Request Letter

January XX, 2011

X Name
Contact Address
City and State

Dear X Name:

I am a Ph. D. candidate in the Department of Organizational Leadership, Policy, and Development at the University of Minnesota conducting a research study on what motivates organizations to develop equitable work environments for Gay, Lesbian, Bisexual, or Transgender (GLBT) people. I am writing to request your participation in this study. You have been selected due to your role as a senior Human Resources professional or a member of a GLBT advocate group within your organization and your organization has been recognized as a leader by the Human Rights Campaign (HRC) in creating an equitable workplace for GLBT employees.

Research conducted for this study is entirely confidential. Your name, and the name of your organization, will only be known to me as the primary investigator. Any report I might publish will not include information that would make it possible to identify a subject, or the subject's employing organization. Participation is voluntary. In return for your participation you will receive a summary of data gathered from all participating companies which you may share with your organization. This summary will not contain data that would identify an individual or an organization.

Enclosed please find the questions and consent form for this study, "What Motivates Minnesota's Fortune 500 Companies to Create Equitable Work Environments for GLBT People?"

Please know that this study seeks an in-depth understanding of how your organization became a recognized leader in creating an equitable employer for GLBT persons. Data collected will not be used to put you, or your organization, in any negative view.

Sincerely,

Brent Opall
Ph.D. Candidate, Organizational Leadership, Policy, and Development
Phone: 952-484-9834 Fax: 612-624-6374
opall001@umn.edu

APPENDIX D

Themes for Coding Data

Data type	Data Source	Theme
Interviews	HRD Professional	Fit Mission of ERG Perceived value from employees Distribution of CEI Scores Process of inclusion Decision Point Who led the process Motivational factors Strongest motivational factor Top down or grass roots Role of ERG in process Cost Return on Investment Emergent theme X* Emergent theme X*
	Member of ERG	Fit Mission of ERG Perceived value from employees Distribution of CEI Scores Process of inclusion Decision Point Who led the process Motivational factors Strongest motivational factor Top down or grass roots Role of ERG in process Cost Return on Investment
Document Review	Mission Statement	
	EEO Statement	
	Diversity Philosophy	

Note. Preformulated codes listed first; Emergent themes designated by *; Employee Resource Group = (ERG); Corporate Equality Index = (CEI)

APPENDIX E

Section 8 IRB Application

8. Recruitment

- 8.1 Describe the recruitment process to be used for each group of subjects: Attach a copy of any and all recruitment materials to be used, e.g., advertisements, bulletin board notices, e-mails, letters, phone scripts, or URLs.**

General recruitment not necessary. Prospective participants who meet the inclusion criteria will be contacted directly and asked to volunteer to participate.

- 8.2 Explain who will approach potential subjects to take part in the research study and what will be done to protect individuals' privacy in this process:**

Initial contact of subjects identified through records search must be made by the official holder of the record, i.e., primary physician, therapist, public school official.

The primary investigator will approach potential subjects, invite them to take place in the research, review the consent form, and answer any questions subjects may have.

Names or other identifiers will not be placed or connected to the survey. Only the primary investigator will have access to the completed surveys.

- 8.3 Are subjects chosen from records?**

☐ Yes. Who gave approval for use of the records: _____
☒ No.

If yes, are records "private" medical or student records?

☐ Yes. Provide the protocol, consent forms, letters, etc., for securing consent of the subjects of the records. Written documentation for the cooperation/permission from the holder or custodian of the records should be attached.
☐ No.

- 8.4 University of Minnesota policy prohibits researchers from accepting gifts for research activities. Is the study sponsor offering any incentive connected with subject enrollment or completion of the research study (i.e., finders' fees, recruitment bonus, etc.) that will be paid directly to the research staff?**

☐ Yes.
☒ No.

If yes above, please affirm that you have declined acceptance of gifts in the box below.

Code of Conduct - http://www1.umn.edu/regents/policies/academic/Code_of_Conduct.pdf

APPENDIX F

Informed Consent Form

Title: What Motivates Minnesota's Fortune 500 Companies to Create Equitable Work Environments for GLBT People?

You are invited to be in a research study that seeks an increased understanding of why organizations create equitable work environments for GLBT employees. You were selected as a possible participant because you are a senior Human Resources professional or a member of a GLBT advocate group within your organization and your organization has been recognized as a leader in creating an equitable workplace for GLBT employees. I ask that you read this form and ask any questions you may have before agreeing to be in the study.

This study is being conducted by: Brent Opall, Ph. D. candidate Department of Organizational Leadership, Policy, and Development, University of Minnesota.

Background Information:

Due to rapidly changing social movements U.S. organizations are paying increasingly more attention to gay, lesbian, bisexual, and transgender people in the workplace. Organizations are now ranked and evaluated by national organizations such as the Human Rights Campaign Foundation (HRC) on the inclusion, policies, beliefs, and treatment of their gay, lesbian, bisexual, and transgender (GLBT) employees. These factors, combined with the larger GLBT social movement, have caused many organizations to invest heavily on initiatives to create equitable work environments for GLBT people. Developing and adapting Human Resource (HR) policies and practices to accomplish this is difficult, time consuming, and costly to organizations—which begs the question: Without federal or state mandate, and at risk for public condemnation, what motivates organizations to create equitable work environments for GLBT people?

The purpose of this study is to investigate the motivational factors for Fortune 500 organizations in the state of Minnesota to spend significant HRD resources to create equitable work environments for GLBT employees.

Procedures:

If you agree to be in this study, we would ask you to participate in a confidential semistructured interview that will not exceed 1 hour. This interview will be recorded and transcribed so that it can be compared and contrasted to similar interviews within this study. Questions will be focused on the motivational factors of your organization to create an equitable workplace for GLBT employees.

Risks and Benefits of being in the Study:

The primary risk of participating in this study is that of confidentiality. The researcher will take necessary precautions, such as coding the data, to guard against the participant being identified. It is extremely unlikely that the interviewee will be identified.

As a benefit to participating in this study you will be provided copies of the research and conclusions found in this study. It is our hope that you find the research insightful and help your organization make informed decisions concerning HRD practices and GLBT employees.

Compensation:

You will receive no monetary compensation for participating in this study. After the study is complete you will receive a copy of the confidential results of the study which you may share with your organization.

Confidentiality:

The records of this study will be kept private. In any sort of report we might publish, we will not include any information that will make it possible to identify a subject. Research records will be stored securely and only researchers will have access to the records. Only the primary researcher will have access to the tape recordings during the transcription process. After the interviews have been transcribed the tape recordings will be erased (additional copies will not be made). The researcher will keep in confidence, and in a secure location, the transcription of the recordings.

Voluntary Nature of the Study:

Participation in this study is voluntary. Your decision whether or not to participate will not affect your current or future relations with the University of Minnesota or with Department of Organizational Leadership, Policy, and Development. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

Contacts and Questions:

The researcher conducting this study is: Brent Opall. You may ask any questions you have now. If you have questions later, you are encouraged to contact him at the University of Minnesota, 612-624-3313, opall001@umn.edu. (The faculty advisors to this study is Dr. James Brown, brown014@umn.edu, 612-624-7754, and Dr. Mary Ann Marchel, mmarchel@d.umn.edu, 218-726-7357)

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher(s), you are encouraged to contact the Research Subjects' Advocate Line, D528 Mayo, 420 Delaware St. Southeast, Minneapolis, Minnesota 55455; (612) 625-1650.

You will be given a copy of this information to keep for your records.

Statement of Consent:

I have read the above information. I have asked questions and have received answers. I consent to participate in the study.

Signature: _____ Date: _____

Signature: _____ Date: _____

APPENDIX G

University of Minnesota IRB Response

PI: Brent Opall

IRB HSC: 1012P94033

Title:

In the Absence of State Regulations, What Motivates Minnesota's Fortune 500 Companies to Create Equitable Work Environments for GLBT People?

From: Institutional Review Board (IRB)

The IRB determined your planned activities described in this application do not meet the regulatory definition of research with human subjects and do not fall under the IRB's purview for one or both of the following reasons:

- 1) The proposed activities are a) not a systematic investigation and/or b) not designed to develop or contribute to generalizable knowledge [45CFR46.102(d)].

Quality assurance activities and evaluation projects designed for self-improvement or program evaluation, not meant to contribute to "generalizable" knowledge, do not meet the threshold of research with human subjects.

Although IRB review may not be required for case studies, you still may have HIPAA obligations. Please contact the Privacy Office at 612-624-7447 for their requirements.

and/or

- 2) You will not obtain private identifiable information from living individuals [45 CFR 46.102(f)].

Interviews of individuals where questions focus on things not people (e.g., questions about policies) do not require IRB review.

You will be analyzing aggregate data that cannot be linked to a living individual.

The above referenced IRB Human Subjects Code (HSC) will be inactivated in the database and you will have no further obligations for this project. Please do not hesitate to contact the IRB office at 612-626-5654 if you have any questions. Thank you for allowing the IRB to make the determination about whether or not review is required.

HRPP Staff

This study examined motivations of Minnesota's Fortune 500 organizations to create GLBT inclusive work places. The foundation of this inquiry was based in collective case study developed by R. Stake (2005).

Yin (2009) wrote that, "for case studies, theory development as part of the design phase is essential, whether the ensuing case study's purpose is to develop or test theory" (p. 35). Yin (2009) describes four types of theories: (a) individual theories, (b) group theories, (c) organizational theories, and (d) societal theories. The most appropriate type of theory for this inquiry is that of organizational theories. Yin (2009) suggests that organizational theories are theories of bureaucracies, excellence in organizational performance, and organizational structure and functions.

Only two to three cases will be included in this case study as the premise being explored indicates only literal replications—they will complement each other. Literal replications do not necessitate more than to answer the how and why. This inquiry follows replication—not sampling logic.