

# Gender Identity in the Canadian Forces: A Review of Possible Impacts on Operational Effectiveness

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## Abstract

One of the most prominent debates over minority participation in the military has been whether or not inclusive policies would undermine operational effectiveness. While the adoption of inclusive policy has tended to indicate that minority participation does not compromise effectiveness, the question has not yet been tested in the context of transgender military service. In this paper, we conduct the first-ever assessment of whether policies that allow transgender troops to serve openly have undermined effectiveness, and we ask this question in the context of the Canadian Forces (CF), which lifted its transgender ban in 1992 and then adopted more explicitly inclusive policy in 2010 and 2012. Although transgender military service in Canada poses a particularly hard test for the proposition that minority inclusion does not undermine organizational performance, our finding is that despite ongoing prejudice and incomplete policy formulation and implementation, allowing transgender personnel to serve openly has not harmed the CF's effectiveness.

## Keywords

Canadian Forces, transgender, diversity, don't ask, don't tell, DADT, operational effectiveness, readiness

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## **Introduction**

One of the most prominent aspects of debates over the presence of women, members from distinct ethnicities, or gays and lesbians in the military has been whether or not minority inclusion would undermine operational effectiveness.<sup>1</sup> While the adoption of inclusive policy has tended to indicate that minority participation does not compromise effectiveness, the question has not yet been tested in the context of transgender military service, as limited scholarly research has been conducted on this issue.<sup>2</sup> In this article, we conduct the first-ever exploratory assessment of whether policies that allow transgender troops to serve openly appear to have undermined effectiveness, and we ask this question in the context of the Canadian Forces (CF), which lifted its transgender ban in 1992 and then adopted more explicitly inclusive policy in 2010 and 2012.

Transgender military service in Canada poses a particularly hard test for the proposition that minority inclusion does not undermine effectiveness. As with other research examining the effects of changes in military personnel or social policies on effectiveness, the impacts are most often inferred rather than demonstrated through controlled, empirical studies.<sup>3</sup> Further, in this context, prejudice against transgender individuals remains prevalent among Canadian civilians and service members and, as we show subsequently, while inclusive policies have been formulated, implementation has been incomplete.<sup>4</sup> Nonetheless, if the available evidence from this exploratory study does not reveal that transgender inclusion compromises effectiveness despite instances of intolerance as well as indications of poor formulation and implementation of policies, this would affirm the feasibility of allowing transgender troops to serve in other organizations whose host societies are more tolerant and whose policies are enacted with more care. Despite ongoing prejudice and weaknesses in the crafting and execution of policy, we did not identify any evidence indicating that allowing transgender individuals to serve openly has harmed the operational effectiveness of the CF.

## **Policy History**

In examining issues related to transgender individuals, it is important to note that sex refers to the categories of male and female as determined by biological characteristics, while gender is a person's own understanding of themselves as male or female (or both or neither). A person's gender identity is displayed through his or her gender expression or presentation and can include, but is not limited to, behaviors, clothing and hairstyles, voice, and emphasis or de-emphasis of bodily characteristics. Thus, gender conformity occurs when one presents their gender in a manner consistent with the social expectations for males and females while gender non-conformity occurs when gender presentation is not consistent with the dominant social expectations.

Although the CF has not used survey research or administered a census to determine the number of transgender service members, scholars estimate that in the United States, transgender citizens are approximately twice as likely as non-transgender Americans to serve in the military.<sup>5</sup> To the extent that these trends characterize Canadian society, we estimate that the active component of the CF includes approximately 265 transgender personnel. In 2011, the CF's Surgeon General reported that approximately one service member undergoes surgical procedures to change genders each year, and this estimate is somewhat consistent with the data from the United States.<sup>6</sup> While some service members may transition to their acquired gender via cross-sex hormone therapy rather than surgery, the vast majority of transgender service members in the CF are either pre-transition or post-transition. And as a result, commanders only rarely must address the question of how to manage personnel undergoing transition, and this article does not go into great depth about transitional administrative or medical issues.<sup>7</sup>

Despite the small number of transgender personnel, gender nonconformity has been the subject of a range of regulations spanning the last several decades. After the 1985 enactment of the *Canadian Charter of Rights and Freedoms*, the CF conducted a comprehensive regulatory review and made a number of changes to comply with new requirements. One policy that the CF revised was CF Administrative Order (CFAO) 19-20, "Homosexuality–Sexual Abnormality Investigation, Medical Examination and Disposal," which stated that "service policy does not allow homosexual members or members with a sexual abnormality to be retained in the Canadian Forces." Although not explicitly included in this order, gender nonconformity often was conflated with sexual orientation at the time, and some transgender individuals were subsequently identified as "members with a sexual abnormality" and released from the CF or denied enrollment.<sup>8</sup>

In 1988 and again in 1992, the CF issued new regulations to reduce and then remove all discrimination based on sexual orientation with, again, an implied link to gender nonconformity. The replacement CFAO (19-36) defined sexual misconduct as "an act which has a sexual purpose or is of a sexual or indecent nature and which . . . constitutes an offence under the Criminal Code or the Code of Service Discipline" but did not include any explicit reference to gender nonconformity. It was not until 1998 that the CF first recognized that the question of transgender military service required attention. Following internal reviews, the CF amended its medical policies in 1998 to recognize sex reassignment surgery (SRS) as an appropriate treatment for gender identity disorder and to include it as a covered medical procedure.

In 2010, as part of a comprehensive updating of the policy manual on the management of personnel information, the CF articulated specific guidance related to transgender individuals with direction for changing an individual's legal name, providing clothing consistent with the target gender, clarifying relevant military physical fitness standards, and updating personnel documents, records, identity cards, and passports. The revised policy required commanders to promote "utmost privacy

and respect,” but stated that previous records, awards, and honors will not be reissued under a new name.<sup>9</sup>

Finally, in February 2012, the CF issued Military Personnel Instruction 01/11, “Management of CF Transsexual Members.” Under the new policy, the CF must consider accommodating the needs of transgender service members who undergo transition, but not if doing so would “constitute undue hardship” or “cause the CF member not to meet, or to not be capable of meeting” standards that apply to other service members. The instruction obliges commanding officers to work with transgender service members, supervisors, and medical authorities to develop suitable plans for units and requires commanders to ensure that the workplace is free from harassment and to “find a balanced solution [to privacy issues] that is satisfactory to all.”<sup>10</sup> Transgender personnel must be consulted throughout the process and are expected to be active participants in the development of workplace accommodation plans.

Between 1985 and 2012, the CF came to understand gender nonconformity as a medical issue and to include reassignment surgery under its standards of care. The concurrent doctrinal and policy emphases on leadership, professional behavior, and respecting the dignity of all personnel served, at a minimum, to remove formal discrimination against transgender service members. That said, as we show subsequently, informal discrimination did not disappear, in part, because inclusive policies were poorly formulated and implemented. Before developing that point, we address whether the adoption of inclusive policy undermined the effectiveness of the CF.

## Methods

To assess whether policies allowing transgender military service may have undermined the effectiveness of the CF, we conducted an extensive literature review, using 216 search permutations, to identify all possibly relevant media stories, governmental reports and scholarly books, journal articles, and chapters.<sup>11</sup> In addition, we obtained written, interview, and focus group feedback from twenty-six individuals including senior military leaders ( $n = 2$ ), commanders ( $n = 10$ ), non-transgender personnel who have served with transgender peers ( $n = 2$ ), transgender service members and veterans ( $n = 4$ ), and scholarly experts on the CF’s operational effectiveness ( $n = 8$ ).

We invited all 106 CF majors, lieutenant commanders, lieutenant colonels, and commanders attending Staff College to participate in our study via an internal e-mail. Twelve individuals expressed interest, though scheduling conflicts prevented two from providing interviews. The ten officers who did provide interviews were reflective of the overall CF population with a slight overrepresentation of those in operational occupations (aircrew, combat arms, and naval operations) and female officers (three of the ten). All but one had served in Afghanistan and had firsthand knowledge of the operational effectiveness of units with which they had deployed. While a participation rate of 9.4 percent is lower than desired, it was considered

acceptable, given the extremely busy schedule of these officers. The first author did check with the participants to see whether they were aware of colleagues who opposed the CF inclusive policies, and none were identified.

Collectively, the ten commanders were aware of at least seven transgender individuals who had transitioned or were in the process of doing so, in all cases from male to female. Five had no awareness of any transgender individual; two had secondary knowledge through discussions with colleagues who had supervised or were supervising transitions; two had served with individuals after transition and one had been directly responsible for supervising a transition and had worked with another unit member who had already transitioned. We conducted two focus group sessions and one individual interview, which we arranged due to scheduling conflicts.

Transgender participants in this research were identified via snowball sampling through social media networks and include four individuals who serve or have served in the CF: a junior noncommissioned Air Force member who has served since 1983, a former junior Navy officer who served for 21.5 years, a junior noncommissioned Army officer who has served for 13 years, and a junior noncommissioned Air Force officer who served in the Regular Force for 22 years and who has been a “Class A” reservist for the past 11 years.<sup>12</sup> In-depth face-to-face interviews were conducted with the first three individuals and the final participant corresponded via e-mail. As well, we sought input from participants’ non-transgender colleagues, and we received feedback from a junior noncommissioned Navy officer and a junior noncommissioned Air Force officer. Significant steps were taken to ensure the participants were fully aware of the research objectives, nature of questions and handling of data. Further participants were given methods to adopt an alias should they wish to conceal their identity, but none chose to do so. Finally, participants were provided with transcripts of their comments and the summaries of their input incorporated in this article to confirm accuracy.

## No Identified Impact on Operational Effectiveness

Operational effectiveness, typically referred to as *readiness* in the United States, consists of a number of related dimensions including cohesion, morale, and leadership. In assessing whether policies allowing transgender service compromised the CF’s effectiveness, we searched for five different types of evidence, described subsequently, of any impact on any of these, or other, aspects of organizational performance. To begin our assessment of the impact of inclusive policies, we conducted a comprehensive search of all possibly relevant media articles published between 1998 and 2014 ( $n = 102$ ). We were unable to find a single media story indicating that transgender-inclusive policy had undermined operational effectiveness. As an added check, we reviewed every media article that contained the words “Canada” and “transgender” and that was published between January 1, 1998, through February 1, 2014 ( $n = 992$ ). The only evidence suggesting that transgender service had compromised operational effectiveness was a single article that reported some military

personnel were “irked” when the CF announced a new policy on gender nonconformity immediately following the publication of another report condemning the CF’s efforts to support families of service members killed in action.<sup>13</sup> While this data point is insufficient, in isolation, for reaching an overall conclusion, it is instructive that during the sixteen-year period under consideration, journalists reported many stories about the impact of the budget, downsizing, combat stress, and other factors on the CF’s operational effectiveness, but not a single story suggesting that transgender-inclusive policy had compromised operational effectiveness. If transgender service had compromised effectiveness, we would expect at least some media attention to have been devoted to the problem.

Second, we conducted a comprehensive review of all possibly relevant scholarly books, book chapters, and journal articles and did not find any academic research suggesting that transgender-inclusive policy had compromised operational effectiveness ( $n = 201$ ). Although we identified many studies of various determinants of the CF’s operational effectiveness, none of those studies suggested that transgender-inclusive policy had compromised performance.<sup>14</sup> As a check on our literature review, we contacted eight scholars who conducted research on the CF including examinations of effectiveness and asked whether they were aware of any evidence about the impact of transgender-inclusive policies. None were aware of any evidence. As was the case with our inference about the lack of media coverage, we do not believe that this data point, in isolation, is sufficient for sustaining an overall conclusion. That said, we were struck that none of the scholarly experts on the CF’s operational effectiveness who we contacted were aware of any compromise resulting from transgender-inclusive policy.

Third, we conducted a comprehensive literature search of more than 100 possibly relevant internal military and governmental reports and policy memos in the public domain from 1998 through 2013 and again found no research touching on the impact of transgender military service on operational effectiveness. During this period, the CF conducted numerous internal studies on various dimensions of operational effectiveness such as unit-level morale and cohesion, harassment, leadership, reenlistment intentions, and the quality of incoming recruits. As a check on our literature review, we contacted the CF’s primary researchers and desk officers responsible for research, and they confirmed to us that the lack of internal analysis suggests that the military has viewed inclusive policies as a nonissue as far as their impact on operational effectiveness is concerned. They told us that if any concerns about a detrimental impact had emerged, the CF would have conducted internal analyses.

Fourth, we asked senior military leaders to tell us if transgender-inclusive policies had undermined the CF’s operational effectiveness, and they reported that policies had not had any negative impact. Vice Admiral Greg Maddison served as Deputy Chief of the Defence Staff from 2001 to 2005 and was in command throughout Canada’s initial post-9/11 engagement in Afghanistan. When we asked him whether policy changes related to transgender service had compromised operational effectiveness in any way, Admiral Maddison responded that it had not. We posed the

same question to Lieutenant General Marc Lessard, who served as the Commander of the Canadian Expeditionary Force Command from 2009 to 2011, and he confirmed Admiral Maddison's observation.<sup>15</sup>

Finally, fifth, we interviewed commanding officers about the impact of transgender-inclusive policies. All twelve commanding officers we interviewed confirmed that transgender-inclusive policies have had no negative impact on operational effectiveness. Of note, all but one of the twelve had served in operations in Afghanistan and hence had firsthand experiences assessing units with which they had deployed. Despite our repeated questioning and probing for negative evidence, it was clear throughout our focus groups and interviews that none of the officers recognized any negative impact of transgender military service on operational effectiveness or its related components including morale, cohesion, or the integrity of the chain of command. While they pointed out areas where current policies could be clarified, these commanders fully supported the inclusive policies and provided suggestions only to strengthen leaders' capacity to supervise transgender subordinates.

At the time when inclusive policies were first enacted in 1998, the CF faced a number of challenges, as the Cold War's end prompted a budget cut of 23 percent and a reduction in force size of 30 percent, just as a generation of equipment approached the end of its life cycle.<sup>16</sup> Despite these obstacles, and perhaps surprisingly, the CF's operational effectiveness improved after transgender-inclusive policies were enacted, as Canadian personnel performed well when facing determined and lethal foes during heavy combat operations in Afghanistan.<sup>17</sup> Scholars argue that the CF recovered from the 1990s, which became known as the "decade of darkness," by increasing funding, raising force strength, acquiring necessary equipment, and strengthening professional development across all levels of military leadership.<sup>18</sup>

Without, of course, attributing the CF's recovery to transgender-inclusive policies, this research did not reveal any indicators that inclusion had compromised operational effectiveness. Indeed, an anthropologist who spent three months living with a Canadian infantry unit in Afghanistan in 2006 found that traditional categories of diversity such as race and gender were irrelevant to the troops and had no impact on cohesion. Rather, she found that service members measured diversity in terms of personality attributes such as laziness, friendliness, and ability to take a joke, "soldiers were assigned to categories based on observed personal qualities, not on . . . demographic factors."<sup>19</sup>

While it is fully recognized that our interview sample was small and additional empirical research would be required in order to draw direct linkages between gender identity policies and operational effectiveness, the fact that none of the five sources used in our triangulation revealed a single issue of concern with regard to effectiveness is taken as a positive sign that the two are not incompatible. Perhaps it should be no surprise that we were unable to find evidence suggesting that transgender inclusion compromised effectiveness. As we emphasized in an article, the CF has reached the stage of professional culture at which only one question matters to

military personnel: can their peers do the job? Demographic characteristics including gender identity are simply not seen as relevant to an individual's capacity to perform assigned duties or to a commander's ability to lead an effective fighting team.<sup>20</sup>

## Policy Formulation and Implementation

Although the adoption of policies that include transgender service members has not undermined the operational effectiveness of the CF, it is nonetheless apparent that additional effort is required to ensure that the CF has formulated and fully implemented appropriate policies. While the scope and much of the content of recent policies were well received, transgender as well as non-transgender enlisted personnel and officers who we interviewed identified a number of policy deficiencies, one of which refers to formulation and three of which refer to implementation. With respect to policy formulation, some of the policy content has been vague, lacking sufficient guidance for transgender individuals or their commanding officers. The latest, 2012 policy revision, for example, fails to instruct commanders how to manage transgender personnel who wish to use hormones but not surgery to adopt a target gender and fails to acknowledge that transgender individuals may pursue different medical treatments and may transition according to distinct timelines. A transgender service member told us that her doctor adhered too rigidly to the CF's standards of care that outline the transition process, rather than viewing them as a guideline.

Commanders told us that the new policy fails to provide sufficient guidance as to how to weigh priorities among competing objectives during their subordinates' transition processes. Although they endorsed the need to consult transitioning service members, they recognized that as commanding officers, they would be called on to balance competing requirements. They saw the primary challenge to involve meeting trans individual's expectations for reasonable accommodation and individual privacy while avoiding creating conditions that place extra burdens on others or undermined the overall team effectiveness. To do so, they said that they require additional guidance on a range of issues including clothing, communal showers, and shipboard bunking and messing arrangements.

In addition to incomplete formulation, we identified three deficiencies in the implementation of inclusive policy. To begin, some medical providers appear not to have acquired sufficient competence in addressing the health care needs of the transgender personnel.<sup>21</sup> All three service members who we interviewed and who transitioned while in the CF told us that, while doctors sought to be supportive, they were predominantly unknowledgeable about transgender health care and unwilling or unable to take the initiative to educate themselves. Transgender personnel reported that they had to do their own research and educate their doctors about available medical treatments. One described a CF doctor who continues to use the term "breast-like tissue" rather than "breasts" and who refuses to demonstrate how to do a breast exam.

In addition, officers and enlisted personnel agreed that the CF need to devote more effort to education and training. A transgender service member explained that after she came out, a brief information session was held for the members of her unit. She was not allowed to attend this meeting, however, and was thus unable to address coworkers' questions. She suspects that the session was more about "reading the riot act" to coworkers than providing them with information. A non-transgender colleague told us that, "A little education of the subject for all CF personnel will go a long way."

Finally, senior leaders have not always held commanders accountable for successful enforcement of the policy. And the chain of command, in turn, has not fully earned the trust of the transgender personnel. While one transgender service member told us that if she ever experienced discrimination or harassment, she would "trust the C of C [chain of command] to solve such a problem," others who we interviewed expressed little confidence in the system. According to one transgender service member, "I just don't think it works that well."

## Consequences of Policy Deficiencies

As a result of policy deficiencies noted previously, the transgender service members have encountered more difficulties than would have been the case if the design and execution of inclusive policy had been managed more carefully. All four transgender service members who we interviewed experienced or were familiar with hostile unit climates. A transgender service member, for example, began her transition after her most recent tour in Afghanistan and hoped that colleagues would adjust. She discovered quickly that this was not the case, however, and had to leave the unit because of harassment. Another service member told us that disapproval is "mostly under the table, behind the scenes... [and] always in a way you can't prove." A non-transgender interviewee reported that coworkers were "cordial" and even "friendly" in the presence of her transgender colleague but were "more mean spirited" in her absence. Three of the four interviewees stated that their decision to transition had a negative impact on their career.

That said, all interviewees reported positive experiences as well and reported that most of their colleagues' reactions tended to range from accepting to "guardedly neutral." One transgender service member who did not experience any significant discrimination told us that she had "zero issues with my transition from any member of the CF." She did experience the occasional use of incorrect pronouns but attributed this to human error, as it did not continue to occur once the person was reminded of the correct pronouns.

Four consequences emerged from our interviews. First, the process of having individuals transition while in uniform tended to prompt informal discrimination and either overt or subtle rejection from some peers. While there was no evidence of erosion to task cohesion, readiness or the willingness of individuals to work together to achieve unit goals, the responses by some colleagues are not consistent with the level of interpersonal relations that characterize strong social cohesion.<sup>22</sup>

Second, access to safe washrooms has, at times, been a challenge for transgender service members who we interviewed. One who was instructed to use specific washrooms in a separate building said that this was “the point at which I became highly visible as being different.” A non-transgender service member told us that her transgender colleague was instructed not to use the female washroom because she had not yet had sex reassignment surgery, even though male colleagues had harassed her in men’s washrooms while female colleagues supported her use of female washrooms.

Third, decisions to disclose transgender status have been taken out of the hands of transgender personnel as a result of gossip and administrative policies. A transgender soldier told us that her new coworkers were informed about her gender nonconformity prior to her arrival, and as a result she was not given the opportunity to become integrated into the new work environment before disclosing her transgender identity. Nor was she provided the option of not disclosing her identity to unit members. Her colleague explains, “I think the most awkward time was in preparing us for her arrival—we were not told that the new member was a transvestite or anything like that—but they did make it seem like the member joining the section had some sort of problem with social comfort—and that the situation was sensitive. It would have been better if no one had said anything.”

Finally, fourth, the transgender service members we interviewed expressed frustration at the CF’s unwillingness to update military medals and previous service records with new names and genders. While the CF maintains that it is not possible to rewrite history, there is a lack of understanding of the consequences, in part because inaccurate documentation repeatedly outed transgender personnel and forced them to explain discrepancies to curious and suspicious colleagues.

## **Lessons**

While this study is fully recognized to be exploratory and based on a very small number of trans CF participants, several lessons can be drawn from the results obtained. For the CF, the most obvious is the need for additional education on transgender issues. Although the intent of recent policies is supported by transgender members and commanders, both groups identified areas where further information would be of benefit. In expanding on current policies, the CF needs to attend to aspects of social cohesion and acceptance of trans individuals by their peers. As these are clearly leadership issues, efforts to better inform leaders at all levels would be of assistance in reinforcing the professional culture of the CF.

It is also considered that this study can provide some valuable perspectives for other nations considering shift policies regarding trans serving from exclusionary to inclusionary. While no single country comparison is sufficient for determining whether a future military decision to allow transgender individuals to serve openly would compromise readiness, the Canadian experience implies four lessons for decision makers particularly in the United States or European context where there are greater commonalities. First, all available evidence suggests that Canada’s

decision to allow transgender individuals to serve openly did not compromise operational effectiveness. This conclusion is consistent with the findings from multiple military and paramilitary organizations in the United States and Europe that have integrated members from a range of minority communities, and that, contrary to frequently expressed concerns, implemented inclusive policies without compromising effectiveness.<sup>23</sup>

Second, although shifting rather quickly in recent years, Canadian civilian society as well as military culture remain generally inhospitable to transgender individuals, and survey research suggests that a high degree of intolerance against transgender people remains.<sup>24</sup> If inclusive policy can be implemented without undermining readiness, even in the context of civilian and military cultures that include high degrees of prejudice, this suggests that regardless of the status of the national conversation about transgender rights in the other nations, military policy can become inclusive without undermining readiness.

Third, even though inclusion has not undermined the CF's operational effectiveness, poor policy formulation and incomplete implementation produced unnecessary burdens and impediments for transgender personnel and their non-transgender peers and commanders. Although successful formulation and implementation of inclusive policy requires some care and attention, many organizations including the British and Australian forces have paved the way. While the elaboration of these lessons is beyond the scope of this article, they can be applied to other national contexts in a straightforward manner and without undue difficulty.

Finally, despite differences between gender identity and sexual orientation, lessons from the repeal of bans on gay and lesbian personnel in numerous countries can be applied to transgender military service. In particular, scholars have argued that one key to successful policy transition is that leaders must state clearly that regardless of personal feelings, service members are expected to work together in pursuit of a common mission.<sup>25</sup> If and when transgender individuals are allowed to serve openly in other nations, an emphasis on leadership will minimize difficulties. This is not to say that every decision to include minority service members proceeds without glitches, but rather that as long as leaders ensure a common focus on the pursuit of the organization's mission, inclusive approaches tend not to compromise effectiveness.

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## Notes

1. James E. Parco and David A. Levi, *Attitudes Aren't Free: Thinking Deeply about Diversity in the US Armed Forces* (Maxwell, AL: Air University Press, 2010); James Burk, "Citizenship Status and Military Service: The Quest For Inclusion by Minorities and Conscientious Objectors," *Armed Forces and Society* 21, 4 (1995): 503-29; D'Ann Campbell, "Servicewomen of World War II," *Armed Forces and Society* 16, 2 (1990): 251-70; David J. Amor and Curtis Gilroy, "Changing Minority Representation in the U.S. Military," *Armed Forces and Society* 36, 2 (2010): 223-46; David Ari Bianco, "Echoes of Prejudice: The Debates Over Race and Sexuality in the Armed Forces," in *Gay Rights, Military Wrongs*, ed. Craig A. Rimmerman (New York: Garland, 1996), 47-52; Brian Mitchell, *Weak Link: The Feminization of the American Military* (Washington, DC: Regnery Gateway, 1989).
2. The few scholarly studies that have addressed transgender military service did not assess its impact on operational effectiveness. See, for example, Jack Harrison-Quintana and Jody L. Herman, "Still Serving in Silence: Transgender Service Members and Veterans in the National Transgender Discrimination Survey," *LGBTQ Public Policy Journal at the Harvard Kennedy School* 3 (2013); Matthew F. Kerrigan, "Transgender Discrimination in the Military, the New Don't Ask, Don't Tell," *Psychology, Public Policy, and Law* 18, 3 (2012): 500-18; Jillian C. Shipherd, Lauren Mizock, Shira Maguen, and Kelly E. Green, "Male-to-female Transgender Veterans and VA Health Care Utilization," *International Journal of Sexual Health* 24, 1 (2012): 78-87; Adam F. Yerke and Valory Mitchell, "Transgender People in the Military: Don't Ask? Don't Tell? Don't Enlist!," *Journal of Homosexuality* 60, 2-3 (2013): 436-57.
3. See, for example, Wilber J. Scott and Sandra Carson Stanley, *Gays and Lesbians in the Military: Issues, Concerns and Contrasts* (Piscataway Township, NJ: Transaction Publishers, 1994).
4. On intolerance toward transgender individuals in the workplace, see Greta Bauer et al., "We've Got Work to Do: Workplace Discrimination and Employment Challenges for Trans People in Ontario," *Trans PULSE e-Bulletin* 2, 1 (May 30, 2011); for findings in the education context, see Catherine Taylor and Tracey Peter, *Every Class in Every School: Final Report on the First National Climate Survey on Homophobia, Biphobia, and Transphobia in Canadian Schools* (Winnipeg, Canada: Egale Canada Human Rights Trust, 2011).
5. See Gary Gates and Jody Herman, *Transgender Military Service in the United States* (Los Angeles, CA: Williams Institute, forthcoming).
6. On the estimate of one surgical transition per year among CF personnel, see, for example, Tom Blackwell, "Rules Set for Transsexuals in Military," *Canwest News Service*, December 8, 2010. Scholars estimate that if the US military allowed transgender personnel to serve and to obtain transition-related health care, 230 service members would request gender-confirming surgeries each year. Given that the US military is nineteen times larger than the CF, one would expect, based on the extrapolation, that twelve members of the CF should seek gender-confirming surgery each year. Because civilian health

- insurance covers such surgery in Canada, however, there is less incentive for service members to obtain surgery while still in the military.
7. For an in-depth analysis of medical and psychological issues pertaining to transgender military service, see Joycelyn Elders, Alan M. Steinman, George R. Brown, Eli Coleman, and Thomas A. Kolditz, *Report of the Transgender Military Service Commission* (San Francisco, CA: Palm Center, 2014).
  8. Alan C. Okros and Denise Scott, *An Update on Canadian Forces Approaches to Gays and Lesbians in Uniform* (Palm Center: University of California at Santa Barbara, 2009).
  9. Chapter 34, "Management of CF Transsexual Personnel," A-PM-245-001/FP-001, *Military Human Resources Records Procedures*, chapter 34, para 5.0, p. 2.
  10. Canadian Forces, *Military Personnel Instruction 01/11*, "Management of CF Transsexual Members," section 2.4.2.
  11. Databases accessed include Scholars Portal, EBSCO Host, Proquest, Web of Knowledge, JSTOR, Queen's University Summon and York University Libraries and LexisNexis.
  12. Members of the reserves on "Class A" service are expected to parade one night per week and conduct two weeks of full-time service or training each year. Those on "Class B" and "Class C" service are employed on a full-time basis.
  13. Blackwell, "Rules Set for Transsexuals in Military," 2010.
  14. The articles reviewed commented on different aspects of Canadian Forces effectiveness and are incorporated in subsequent discussion. See the references noted subsequently to works by Bland; Jockel; Sloan; Hope; Sharpe and English; Holland and Kirkey; Blatchford; and Irwin.
  15. General Lessard, who relieved a brigadier general in Afghanistan and a colonel in Haiti, was well-known for closely monitoring subordinate commanders and their ability to maintain operational effectiveness in theater. As both Officers had made public comments on their concerns regarding CF effectiveness, it is considered unlikely that either was reluctant to identify issues regarding trans service members in order to protect the institution.
  16. Douglas L. Bland, *Canada Without Armed Forces?* (McGill, Canada: Queen's University Press, 2004); Jack Granatstien, *Who Killed the Canadian Military?* (Toronto, Canada: Harper Collins, 2004); Joseph T. Jockel, *The Canadian Forces: Hard Choices, Soft Power* (Toronto, Canada: Canadian Institute of Strategic Studies, 1999).
  17. Eleanor Sloan, *Canada and NATO: A Military Assessment* (Ottawa, Canada: Canadian International Council, 2012); Ian Hope, *Dancing with the Dushman: Command Imperatives for the Counter-insurgency Fight in Afghanistan* (Kingston, Canada: Canadian Defence Academy Press, 2008).
  18. G. E. Sharpe and Allan D. English, *The Decade of Darkness* (Kingston, Canada: Canadian Forces Leadership Institute, 2003); Kenneth Holland and Christopher Kirkey, "Canada's Commitment to Afghanistan," *American Review of Canadian Studies* 40, 2 (2010): 167-170; Kenneth Holland and Christopher Kirkey, "An Evaluation of Canada's Engagement in Afghanistan," *International Journal* 68, 2 (2013): 269-73; Christie Blatchford, *Fifteen Days: Stories of Bravery, Friendship, Life and Death from Inside the New Canadian Army* (Toronto, Canada: Doubleday, 2007).

19. Anne Irwin, "Diversity in the Canadian Forces: Lessons from Afghanistan," *Commonwealth and Comparative Politics* 47, 4 (2009): 503.
20. Okros and Scott (2009).
21. The views of CF Medical Officers were not included in this study and should be examined in subsequent work. Among reasons for not including medical practitioners, the authors had concerns over doing so without inadvertently identifying the trans participants. It was also recognized that the CF does not have uniformed experts who specialize in gender reassignment surgery or therapy, hence this would require interviews with external specialists who provide services to the CF on a contractual basis.
22. Task cohesion is a shared commitment to the same mission, while social cohesion refers to whether or not members of a group like and trust one another. The roles of task versus social cohesion have been debated in the literature particularly in the context of combat missions. In particular, see the exchanges published in *Armed Forces and Society* among Anthony King, Guy Siebold, James Griffith, Robert MacCoun et al., and Leonard Wong published in vols. 32(4), 33(2), 33(4), and 34(1).
23. Aaron Belkin et al., "Readiness and DADT Repeal: Has the New Policy of Open Service Undermined the Military," *Armed Forces and Society* 39, 4 (2013): 587-601; Aaron Belkin and Melissa Levitt, "Homosexuality and the Israel Defense Forces: Did Lifting the Gay Ban Undermine Military Performance," *Armed Forces and Society* 27, 4 (2001): 541-66.
24. Egale Canada Human Rights Trust (2011).
25. See Gail L. Zellman et al., "Implementing Policy Change in Large Organizations," in *Sexual Orientation and U.S. Military Personnel Policy: Options and Assessment*, eds Bernard D. Rostker and Scott A. Harris (Santa Monica, CA: RAND, 1993): 368-94.

## Author Biographies

**Alan Okros** is a deputy director of academics in the Department of Defence Studies at Canadian Forces College, Toronto. Over the last thirty years, he has contributed to the military professional literature and academic publications on the topics of diversity, leadership, and the profession of arms as well as having conducted applied research on a range of military personnel issues.

**Denise Scott** recently completed her master's in information in library and information science from the University of Toronto and previously completed her MA from York University's Graduate Program in Interdisciplinary Studies. She has coauthored work on issues of gender and sexuality in library settings as well as reports on policies and experiences related to gays and lesbians serving in the Canadian Forces. Most recently, she has submitted a book chapter on liminal states and entry level military socialization.