Letter from the Editor

BY: ALBERT J. MILLS

Welcome to the Workplace Review for Fall, 2019. We have a great set of articles lined up in this issue, the majority of which were presented at Atlantic Schools of Business conferences in the last two years. Our first two articles focus on economic and trade issues, followed by three articles and a case that examine issues of diversity and gender at work.

Our first paper is by Lovika Soral and Hsin-Chen Lin of the University of New Brunswick's Faculty of Management. In the paper the authors ask, "what should Canada export under the CETA", with particular attention to the aircraft sector. They go on to identify three specific products within the aircraft sectors that offer the highest potential to export to the European Union. They make a number of conclusions, including the argument that Machinery and Transport Equipment may be the area that benefits Canadian companies the most. Through analysis of revealed Comparative advantage; the Import Penetration Index and the Trade Intensity Index, the results indicate that "Canada has the highest comparative advantage when exporting ground flying trainers, followed by undercarriages and helicopters." The authors go on to discuss the potential trade outcomes for those three MTE items from the aircraft sector.

Moving to study of the circular economy, our next paper examines plastic films as a part of the circular economy in Nova Scotia. The reported study is by Sahand Ashtab and Gemma Whyte of the Shannon School of Business, of Cape Breton University. Sahand and Gemma are "specifically interested in determining whether consumers are provided with any information at all on type or recycling of plastic films found on consumer products' labels". To this end they selected a random sample of 150 products with plastic film at a retail store in Cape Breton to test their hypothesis which is "less than 50% of the products with plastic film in them provided information regarding the type of plastic film or the recommendation for disposal at 5% significance level." Their study concludes that "there is not enough evidence to support the claim that equal to, or greater than 50% of the products with plastic film in them provided information regarding the type of plastic film or the recommendation for disposal."

The first of our gender and diversity studies is a study by Sobey School (Saint Mary's University) professor Firat Sayin, examining "the impact of intersecting identities and context on student evaluations of teaching effectiveness." In this study Firat "employs an intersectional approach to conduct a multi-disciplinary review of studies published between 2007 and 2017 with the goal of understanding the impact of non-instructional factors on SET [Student evaluation of teaching effectiveness]". His findings are somewhat disturbing for anyone concerned with ensuring fairness and objectivity in student valuations. As he points out, SET has become an increasingly "important determinant of hiring, promotion, and tenure decisions." The study indicates that: (i) "female instructors and instructors who are ethnic minorities receive lower SET scores, (ii) instructor attractiveness is consistently positively associated with higher ratings after controlled for teaching effectiveness, (iii) there is an overwhelming focus on gender as an identity while other identities are in most part ignored, and (iv) the majority of studies are conducted in the U.S." Firat goes on to discuss the implications for researchers and instructors.

The second gender and diversity paper is by Nia MacFarlane and Shelley Price of the Gerald Schwartz School of Business at St. Francis Xavier University. The focus of this study is the presentation of women and leadership in management textbooks. Undertaking a critical discourse analysis, Nia and Shelley set out to study the representation of women in management textbooks. To that end, they selected ten management textbooks that were generally in use across a number of undergraduate business courses. From those textbooks they analysed the first ten cases in each book. Then each textbook was analysed in turn. The

authors were looking for disparities of representation in each case and how women were described in "leadership and followership positions." The results yielded the following: 1) there was a general exclusion of women throughout the textbooks; 2) imaging of incompetent female leaders (e.g., discussion of errors made by female leaders and followers); and 3) the depiction of women as playing a supporting role to male leaders.

The third paper around the gender/ethnicity theme is by Sobey Business School (Saint Mary's University) PhD candidate Kristin Williams. Here Kristin lays out an approach to understanding gender and history through an approach she calls feminist critical historiography. She goes on to "outline the approach in detail and concludes with a small case study which illustrates how the method can be employed." Drawing on the life and times of Frances Perkins, the first female cabinet member of the United States government and architect of social welfare, Williams outlines the various ways that female leaders' work, experiences and observations get lost to management and organization studies.

In the final case, Jim Grant, from the Manning School of Business at Acadia University, lays out a case where "a mid-level employee of Hydro One was terminated for breach of his employer's zero tolerance policy on discrimination and harassment, and because his off-duty conduct reflected poorly on his employer". The case argues that the employee's details "seem to be more connected to the furor on social media, or at least as much, as it was to his behaviour." Grant argues that "students may find this case especially challenging in that it requires them to balance the ethics of creating a gender-inclusive workplace with the legal rights of the worker in the context of a social media frenzy."

Finally, we encourage new submissions especially from papers presented at recent ASB conferences but also from outside of those forums. Workplace Review aims to publish high-quality articles from authors in Atlantic Canada, or on topics pertinent to the Atlantic Canadian and Canadian context. We are also pleased to consider special issues. If you have an idea for a special issue of the Workplace Review, please contact myself (albert.mills@smu.ca) and/or Ellen Shaffner (ellen.shaffner@smu.ca). To submit a paper for review, please contact Ellen Shaffner, Managing Editor, at the email above.

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WHAT SHOULD CANADA EXPORT UNDER THE CETA? AN EXAMINATION OF THE CANADA-EUROPEAN TRADE AGREEMENT FOR THE AIRCRAFT SECTOR[1]

We identify three specific products within the aircraft sectors that offer Canadian exporters the highest potential to export to the European Union under the newly signed Comprehensive Economic and Trade Agreement between Canada and European Union. The results suggest that the trade agreement will enhance the Canadian export potential to the European Union for these products.

Introduction

The economic relationship between Canada and the European Union (EU) has evolved, grown, and deepened over the last 40 years. Canada was one of the first industrialized countries with which the EU established a cooperative framework in 1976. Since then, several sectoral agreements have been concluded and the Comprehensive Economic and Trade Agreement (CETA) was established in 2017. After the signing of Comprehensive Economic and Trade Agreement between Canada and the European Union, 99.6% of prevailing tariffs on Canadian goods entering the EU were eliminated (Government of Canada, 2017a; 2017b; 2018). Out of all the sectors in Canada that can benefit from this agreement, Machinery and Transportation Equipment (M&TE) sector may be the one that benefits the most. M&TE is the biggest sector of the Canadian economy and the sector alone contributes 27% of Canadian GDP. In addition, the EU is the world's largest importer of M&TE, yet the EU received only 1.31% of its M&TE imports from Canada in the past (Statistics Canada, 2018). Therefore, it is important to examine how this newly signed CETA impacts Canadian exports, especially for the M&TE sector. We use several trade indicators in this paper to assess the competitive advantages of the Canadian aircraft sector exports to the EU and make a few recommendations regarding which specific products have the highest price advantages over other countries when exporting to the EU.

We organize the rest of this paper as follows: first, we provide the background of the trade relationship between Canada and the European Union regarding the M&TE sector. Second, we

describe the data and trade indicators that we use. Third, we present the results from the trade indicators and identify three specific products with the highest export potential to the EU. In the final section, we state some limitations of this study and make suggestions for future research.

Background

The Comprehensive Economic and Trade Agreement (CETA) between Canada and the European Union (EU) was signed in October 2017. Under this agreement, almost all tariff lines on industrial products for both sides are fully eliminated. Reductions in duty rates are expected to bring down the costs incurred by Canadian exporters, and thus make goods more competitive in the European market. Tariff elimination is also expected to lead to wider choice and lower prices of Canadian goods for EU consumers. Government reports have shown that the free trade agreement has several impacts on the economy in Canada and in the EU. For example, the study conducted by the European Commission's Directorate-General for Trade has predicted that an annual increase in bilateral exports and imports between the EU and Canada will be at least 8%, representing an additional €12 billion per year (European Commission, 2017a; 2017b). Parliament of Canada (2017) estimates that tariff reduction induced by CETA will increase Canadian export of manufacturing goods by 651 million Canadian dollars and transport equipment by 554 million Canadian dollars to the EU market.

Out of all sectors that benefit from the trade agreement for Canadian companies, Machinery and Transportation Equipment (M&TE) may be the one that benefits the most. The Machinery and Transportation Equipment sector has consistently been one of the most important sectors for productivity and growth of the economy of Canada. The M&TE Sector of Canada is a major contributor to the country's GDP, economic activity, and employment. The production of the machinery and transportation equipment comprises 51% of the total Canadian production, out of which 55% of production is exported. The EU has been the world's largest importer of M&TE for decades and has imported €555.14 billion worth of these goods in 2016, but Canada contributed only 1.31% with €14.98 billion of their M&TE imports. The EU is Canada's second biggest trading partner after the United States. Canada contributed approximately 2% of the EU's global external trade in goods. Canada is the third largest exporter of M&TE to the EU with €14.98 billion, ranked after the United States and China (European Commission, 2006a; European Commission, 2006b; Parliament of Canada, 2017).

The newly signed trade agreement provides great opportunities to the Canadian M&TE industry to take advantage of tariff reductions provided under the CETA and increase its share in the EU imports of these goods. The elimination of almost all tariffs by the EU will not only decrease the price of Canadian goods in the EU but also provide less processing time at the EU's borders. It will make Canadian goods more affordable to the EU consumers and facilitate faster delivery at the destination with a cost advantage. The benefits of CETA are known, yet not all products have the potential to be exported to the EU. In our study, we will identify a few products within the aircraft sector that have the highest potential to export to the European Union.

Methods

We draw most of our inferences on Canada-EU bilateral trade from the reports complied by Global Affairs Canada (Statistics Canada, 2018). Their reports offer data on key trade and economic indicators between Canada and rest of the world. It also describes transactions between Canada and its main trading partners that capture imports and exports of goods and services, direct investment inflows and outflows, and the current account balance. We collected our trade data from a few databases including Trade Map, the World Trade Organization, and World Fact Book. We then use the trade indicators developed by Mikic and Gilbert (2009) in our analysis. The specific indicators we use are Revealed Comparative Advantage (RCA), Import Penetration Index (IPI), and Trade Intensity Index (TII). We also use Import Forecast, Rank Analysis and Tariff Analysis (Loke, 2013) to identify the specific products expected to gain trade advantage for Canadian exports to the EU under the CETA. These trade indicators have been used by other researchers (Plummer et al., 2010; Gonzalez et al., 2012; Evans et al., 2007; Yue, 2001; Bender & Li, 2002; Ferto & Hubbard, 2002; Leu, Chung & Koh, 1998; Batra & Khan, 2005; Cheong, 2010). Each of the trade indicators (RCA, IPI and TII) has its own assumptions, usages, and rationales. We explain each of these three indicators below and summarize them in Table 1. We explain our results of Import Forecast, Rank Analysis and Tariff Analysis in our Results Section.

Comparative Advantage index (RCA)

RCA measures a country's export potential. The RCA reveals whether any country is in the process of extending the products in which it has a trade potential, as opposed to situations in which the number of products can be competitively exported (World Bank Group, 2010). Its use is to indicate the comparative advantage of exporting products according to its share in the world market. It can also provide useful information about potential trade prospects with new partners for a product. The RCA is the trade analysis tool that is used to evaluate the comparative advantage of a product. It indicates a country's export potential or traders' need to export. Countries with similar RCA profiles are unlikely to have high bilateral trade intensities unless intra-industry trade is involved. RCA measures, if estimated at high levels of product disaggregation, can focus attention on other nontraditional products that may be successfully exported. RCA is measured as follows:

$$RCA_{ij} = \left(\frac{X_{ij}}{X_{it}} \Big/ \frac{\sum X_{wj}}{\sum X_{wt}} \right)$$

where: X_{ij} and X_{wj} are the values of country *i*'s exports of product *j* and world exports of product *j*
X_{it} and X_{wt} refer to the country *i*'s total exports and world total exports.

Import Penetration Index (IPI)

The import penetration rate shows to what degree domestic demand (the difference between GDP and net exports) is satisfied by imports. Calculated at the sectoral level, it is termed as self-sufficiency ratio. The index may be used as the basis of specific policy objectives targeting self-sufficiency. It provides an indication of the degree of vulnerability to certain types of

external shocks. The ratio of total imports to domestic demand is calculated as a percentage. It ranges from 0 (with no imports) to 100 per cent when all domestic demand is satisfied by imports only (no domestic production and no exports). The IPI is measured as follows:

$$\frac{\sum_s M_{sd}}{GDP_d - \sum_s X_{ds} + \sum_s M_{sd}} x100$$

where: *d* is the country under study
s is the set of all other countries
X is total bilateral exports
M is total bilateral imports
GDP is gross domestic product of country *d*.

In words, the numerator is total imports to *d*, the denominator is the GDP of *d* less total exports and plus total imports (i.e. total domestic demand).

Trade Intensity Index (TII)

The trade intensity statistic is the ratio of two export shares. The numerator is the share of the destination of interest in the exports of the region under study. The denominator is the share of the destination of interest in the imports of the world as a whole. In other words, the statistic indicates whether a region exports more (as a percentage) to a given destination than its import from the world. It takes a value between 0 and +∞. Values greater than 1 indicate an 'intense' trade relationship. The TII is measured as follows:

$$\frac{\sum_{sd} X_{sd} / \sum_{sw} X_{sw}}{\sum_{wd} X_{wd} / \sum_{wy} X_{wy}}$$

where: *s* is the set of countries in the source
d is the destination
w and *y* represent the countries in the world
X is the bilateral flow of total exports

In words, the numerator is the export share of the source region to the destination; the denominator is the import share of the world to the destination.

Table 1 Trade Indicators and Tariff Analysis Definitions

Index	Assumption	Assumption used in the study	Rationale
Revealed Comparative advantage (RCA)	A country can only gain advantage out of signing an FTA if it has an export advantage against competing global suppliers.	Identification of the specific products will require the Canadian firms to possess a comparative advantage towards exporting the products.	If the RCA value is more than 1, it indicates Canada is in an advantageous position to supply the identified product when compared to other global suppliers. This would imply a possibility of trade diversion for EU importers in favor of Canada because of CETA.
Import Penetration Index (IPI)	An exporting country can only gain benefit from its comparative advantage if the importing partner is willing to import.	Even if Canadians have good RCA value, it will only result in trade diversion in favor of Canada if the EU needs the imports.	High IPI index for products in the EU would mean that the EU's import dependency towards satisfying the domestic demand is higher.
Trade Intensity Index (TII)	An exporting country can only gain advantage of high import dependency if the importing country wishes to import from them.	High RCA for Canada can only take advantage of high IPI for the EU if there is a buying preference held by the EU towards Canadian products.	High TII indicates strong bilateral relations between Canada and the EU and hence indicates positive trade impact for the said product.

Results

The M&TE sector includes six different product codes (HS84, HS85, HS86, HS87, HS88, and HS89) covering items such as vehicles, machinery, electrical equipment, aircraft, ships, and railway. These Harmonized System (HS) codes are the standardized systems of names and numbers that classifies traded product developed by WCO (World Customs Organization). We will use the HS88 product code sector (Aircraft, spacecraft, and parts thereof) as an example to present our empirical results in this paper. The complete analysis for all six product codes under the M&TE sector can be found in the appendixes of the extended study (Soral, 2018). All results are based on the trade information in 2016.

Results of the Comparative Advantage index (RCA) Analysis

We calculated RCA values for all the products under the HS88 product code and assigned their rankings based on their RCA values in Table 2. The high RCA value of the product implies

that Canada has a strong potential to export the product to other countries. According to our results, Canada has the highest comparative advantage when exporting for ground flying trainers, followed by undercarriages and helicopters. However, this export strength will only be converted into an export advantage for Canada if there is an import demand for these products in the EU. Hence we check the import penetration index (IPI) of all HS88 products to estimate the dependence of the EU market towards fulfilling its domestic demand.

Table 2 RCA Analysis for HS88 Products

Product Code	Product Label	RCA Ranking	RCA Value
HS880529	Ground flying trainers and parts	1	31.50
HS880320	Undercarriages and parts	2	10.97
HS880211	Helicopters of an unladen weight ≤ 2000 kg	3	10.26
HS880230	Aeroplanes and other powered aircraft of an unladen weight > 2000 kg but ≤ 15000 kg	4	9.45
HS880212	Helicopters of an unladen weight > 2000 kg	5	2.75
HS880100	Balloons and dirigibles; gliders, hang gliders and other non-powered aircraft	6	2.29
HS880240	Aeroplanes and other powered aircraft of an unladen weight > 15000 kg	7	1.91
HS880310	Propellers and rotors and parts	8	1.41
HS880220	Aeroplanes and other powered aircraft of an unladen weight <= 2000 kg	9	1.38
HS880330	Parts of aeroplanes or helicopters	10	1.32

Results of the Import Penetration Index (IPI) Analysis

We calculated the IPI value of the HS88 products to estimate if there is a demand and import potential to the EU market. The products with the highest IPI values are presented in Table 3. The higher IPI value of the product, the greater the EU's import potential from other countries.

Table 3 IPI Analysis for HS88 Products

Product Code	Product Label	IPI Ranking	IPI Value
HS880240	Aeroplanes and other powered aircraft of an unladen weight > 15000 kg	1	1.168
HS880330	Parts of aeroplanes or helicopters	2	0.712
HS880320	Undercarriages and parts thereof, for aircraft	3	0.046
HS880230	Aeroplanes and other powered aircraft of an unladen weight > 2000 kg but ≤ 15000 kg	4	0.045
HS880212	Helicopters of an unladen weight > 2000 kg	5	0.033
HS880390	Parts of aircraft and spacecraft	6	0.028
HS880310	Propellers and rotors and parts	7	0.010
HS880211	Helicopters of an unladen weight <= 2000 kg	8	0.004
HS880260	Spacecraft, incl. satellites, and suborbital and spacecraft launch vehicles	9	0.004
HS880529	Ground flying trainers and parts	10	0.002

Results of the Rank Analysis

We weighted RCA and IPI ranking equally and calculated its Combined Ranking in Table 4. We then assigned its Final Ranking based on the Combined Ranking. The lower the Combined Ranking from the RCA Ranking and the IPI Ranking, the lower the Final Ranking. We rearrange the Final Ranking in Table 5. The results indicate that undercarriages (HS880320) and different sizes of aeroplanes (HS880230 and HS880240) carry both good export potential from Canada and import potential by the EU.

Table 4 Rank Analysis for HS88 Products

Product Code	RCA Ranking	IPI Ranking	Combined Ranking	Final Ranking
HS880529	1	10	11	5
HS880320	2	3	5	1
HS880211	3	8	11	5
HS880230	4	4	8	2
HS880212	5	5	10	4
HS880100	6	15	21	10
HS880240	7	1	8	2
HS880310	8	7	15	8
HS880220	9	11	20	9
HS880330	10	2	12	7

Table 5 Final Ranking for HS88 Products

Product Code	Final Ranking
HS880320	1
HS880240	2
HS880230	3
HS880212	4
HS880211	5
HS880529	6
HS880330	7
HS880310	8
HS880390	9
HS880220	10

Results of the Trade Intensity Index (TII)

We chose three products that have the highest Final Ranking from our Rank Analysis to calculate our Trade Intensity Index (TII). These three products (HS880320, HS880230, and HS880240) have the highest trade potential between Canada and the EU. We present our results in Table 6. The values of TII for these three products are greater than 1, which implies that there is an intense trade relationship for the export of such products from Canada to the EU. The values (greater than 1) also mean that Canada has price competiveness to export these products to the EU.

Table 6 Trade Intensity Index for HS880320, HS880240, and HS880230 (All values are in US Dollars)

| Product Code	Per Item Export from Canada	Total Export from Canada	Per Item Import to EU	Total Import to EU	TII	Projected Export to EU from Canada for 2020
HS880320	204,976	2,533,618	2,393,106	105,961,708	3.58	379,657
HS880240	1,486,163	2,533,618	59,411,123	105,961,708	1.05	2,175,100
HS880230	238,991	2,533,618	2,336,252	105,961,708	4.28	334,517

Results of the Import Forecast

The growth rate of these three products has been calculated as depicted in Table 7 and future projections for the year 2020 have also been calculated. There has been consistent growth of import by the EU over the period from Year 2012 to 2016, as indicated in Figure 1.

Table 7 Import Forecast Analysis for HS880320, HS880240, and HS880230 Products (All values are in US Dollars)

Product Code	European Union's (EU 28) imports from world					Growth Rate	Projected
	Value in 2012	Value in 2013	Value in 2014	Value in 2015	Value in 2016		Value in 2020
HS880320	1,292,041	1,432,106	2,312,102	2,139,944	2,393,106	16.66	4,432,511
HS880240	40,596,251	39,955,898	47,828,769	54,715,870	59,411,123	9.99	86,952,199
HS880230	1,668,836	1,362,882	1,970,544	2,287,857	2,336,252	8.77	3,270,064

Figure 1 Import of the EU during 2012 – 2016 for HS880320, HS880240, and HS880230 Products (All values are in US Dollars)

	Value in 2012	Value in 2013	Value in 2014	Value in 2015	Value in 2016
■880320	1292041	1432106	2312102	2139944	2393106
■880230	1668836	1362882	1970544	2287857	2336252
■880240	40596251	39955898	47828769	54715870	59411123
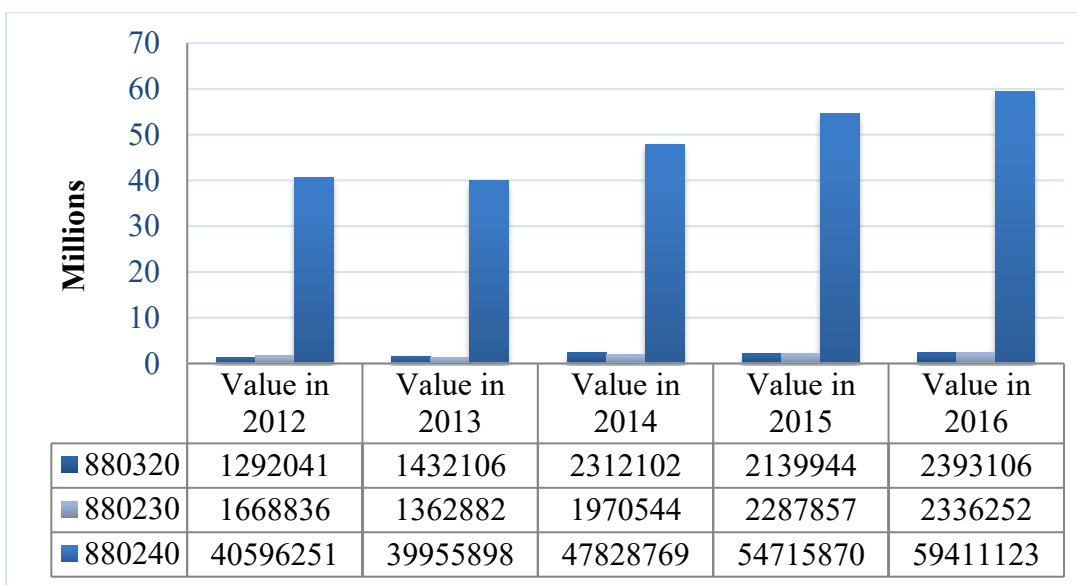
Results of the Tariff Analysis

High Trade Intensity Index (TII) can only lead to trade diversion in favor of the exporting country if the importing country witnesses price advantage vis-a-vis existing suppliers. If the difference between World Trade Organization (WTO) Most Favored Nation (MFN) tariff rates and the tariff rates applied to Canadian products is higher, there is a higher chance of trade diversion in favor of Canada. Canada will be able to supply the identified products with the high TII values if Canada's tariff rate is lower than the existing suppliers of M&TE to the EU.

Our final step of the analysis is to consider competing countries who also export HS88 products to the EU to evaluate Canada's price competitiveness over other countries. The European Union consists of several country members and each county has its own top trading partners as Canada's competing countries. In this analysis, we will use countries that import the highest HS880320, HS880240, and HS880230 products and identify their respective trading partners. We present our results in Table 8. Before the implementation of CETA, there was a 2.7% tariff rate on the Canadian HS88 products exporting to Germany and France. With the tariff rate, Canada was one of Germany's top four trading partners for HS880320 products and one of their top three trading partners for HS880240 products. As for HS880230 product, Canada was one of France's top two trading partners. When this tariff rate is eliminated, it will give Canada a better price competitiveness over other countries.

Table 8 Tariff Analysis for HS880320, HS880240, and HS880230 (All values are in US Dollars)

Product Code	Projected Export to EU from Canada for 2020	EU country with High Import Value	Top 10 Trading partners	Applicable Tariff	Inference
HS880320	379,657	Germany	France	0	After elimination of tariff rate of 2.7 (MFN rates) it is possible that Canada will have a better share in terms of its Export to the EU.
			US	0.9	
			UK	0	
			Canada	2.7	
			Russia	0.9	
			Brazil	0.9	
			Malta	0	
			Switzerland	0	
			Netherlands	0	
			Denmark	0	
HS880240	2,175,100	Germany	France	0	After elimination of tariff rate of 2.7 (MFN rates) it is possible that Canada will have a better share in terms of its Export to the EU.
			Spain	0	
			Canada	2.7	
			Brazil	1.4	
			US	1.4	
			Switzerland	0	
			South Korea	0	
			UK	0	
			Sweden	0	
			UAE	1.4	
HS880230	334,517	France	US	1.4	After elimination of tariff rate of 2.7 (MFN rates) it is possible that Canada will have a better share in terms of its Export to the EU.
			Canada	2.7	
			Brazil	1.4	
			Luxembourg	0	
			Australia	1.4	
			Austria	0	
			Italy	0	
			Congo	0	
			Indonesia	0	

Conclusion

As one of the top ranked importers of Machinery and Transportation Equipment, the EU presents itself as an important trading partner for Canada. Canada has exported only a fraction of the M&TE products that the EU imports. Canada exports about €7.32 billion worth of machinery and transportation equipment to the EU compared to the €555.11 billion that the EU imported in 2016. This low amount that Canada exported to the EU may be due to the tariff added on the M&TE products. After the signing of CETA between Canada and the EU, the tariff was eliminated. This newly signed free trade agreement should provide the Canadian M&TE sector with a better price advantage over other countries when exporting to the EU. We identify three aircraft products (HS88) within the M&TE sector that have the highest potential to export to the EU according to their high growth rates and favorable trade intensities. These three products are undercarriages (HS880320) and different sizes of aeroplanes (HS880230 and HS880240). For undercarriage products (HS880320), Canada was one of Germany's top 4 trading partners in 2016. The other three top trading partners that Germany had either have no tariffs or faced a tariff of only 0.9%, while Canada had 2.7% tariff rates. After CETA, this 2.7% tariff rate that Canada had is eliminated and it should provide Canada with greater price competitiveness over other countries when exporting to Germany. The same situation applies to different sizes of aeroplanes products (HS880230 and HS880240) as well.

The implementation of CETA will not only increase the volume of M&TE sector exports with price advantages but it will also help to create more job opportunities within Canadian markets. There are some limitations of our study. First, we only analyzed aircraft (HS88) products. The whole analysis of the M&TE sector to the expansion of all sectors will identify all potential products that have the highest export potential from Canada to the EU under the CETA for the future research. Second, we only consider tariffs as a trade barrier in this study. Other economic factors, trade barriers, and non-tariff measures such as exchange rate fluctuation, inflation rate, and regulations are not considered. Third, noneconomic consideration such as politics is beyond the scope of our study.

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CIRCULAR ECONOMY OF NOVA SCOTIA:
STUDY OF PLASTIC FILM

In this paper, we investigate plastic films as a part of the circular economy in the province of Nova Scotia, Canada. Specifically, we are interested in determining whether consumers are provided with any information at all on type or recycling of plastic films found on consumer products' label. We select a random sample of 150 products with plastic film at a retail store in Cape Breton to test our hypothesis which is 'less than 50% of the products with plastic film in them provided information regarding the type of plastic film or the recommendation for disposal at 5% significance level.' The outcome of our hypothesis testing is that the null hypothesis is rejected indicating there is not enough evidence to reject our hypothesis.

Introduction

Around 21% of the materials that end up in the landfills in Nova Scotia, Canada are plastics according to the waste audit report published by Divert NS (Divert NS Waste Audit Report, 2018). This equals to 59,258 tonnes of plastics from which 38.3% are plastic film (22,696 tonnes). The number of plastic bags used in the province of Nova Scotia is estimated to be 300 to 500 million bags not all of which is recyclable due to contamination issues (Campbell, 2018). It was found that due to China's ban on importing certain types of scrap which also included Plastic Films, the city of Halifax in Nova Scotia, which used to send 80% of its recycling to China had to get special permission to bury 300 metric tons of plastic bags and wrapping in a landfill in West Hants Nova Scotia (Valley Waste Resource Management, 2018). Plastic film is banned from landfill by the Province of Nova Scotia while Halifax has been granted permission to landfill for 6-month period until new markets for recycling or reusing plastic films emerge. Some recycling facilities have diverted material to countries such as Vietnam, India, Mexico, and Malaysia (Valley Waste Resource Management, 2018). Consuming less single-use garbage bags is a great step forward in helping with this emerging environmental problem. According to an opinion poll conducted in 2012 by Angus Reid, 63% of Atlantic Canadian participants supported the idea of banning the distribution of single-use garbage bags which was the highest support in the country (Valley Waste Resource Management, 2018).

Two thirds of the 1,162 inspected companies by the Chinese Ministry of Environmental Protection (MEP) in 2017, that handle scrap imports, had problematic practices or banned inventory (Green Planet 21, 2017). In order to improve the quality of China's imported recyclables and prevent import of banned materials (materials contaminated with garbage and hazardous waste), China instituted the National Sword. The National Sword banned materials such as polymers of ethylene, styrene, vinyl chloride, and polyethylene terephthalate (PET). This had a great impact on many countries around the world such as Britain which, according to Greenpeace UK, used to send recyclables to China of up to 10,000 Olympic size swimming pools, the United States which exported 13.2 million tons of scrap paper and 1.42 million tons of scrap plastics annually to China, and Canada (Freytas-tamura, 2018). Currently, China has initiated

the Blue-Sky waste ban which focuses on the same types of banned materials being imported into China but in a more rigid manner (Waste Management Review, 2018). The province of Calgary in Canada used to send 50 percent of their plastics and 100 percent of their mixed paper to China. The material has been piling up and the city's lead manager of waste and recycling services told the Canadian Broadcasting Corporation that currently, there is 5,000 tons of plastics and mixed paper being stored in sheds, shipping containers, trailers, and warehouses (Freytas-tamura, 2018).

Examples for Plastic Film in Circulation in Nova Scotia

There are different types of plastic film made of different resins, e.g., Low Density Polyethylene (LDPE) with resin code of #4, High Density Polyethylene (HDPE) with resin code of #2, Polyethylene Terephthalate (PET) with resin code of #1 (Headley Pratt Consulting, 1996). A recent study published by Dalhousie University stated that a majority of the plastic used on farms, which are part of the commercial sector, are bale wrap and silage film accounting for 80%, is LDPE, next is row covers and mulch film at 8% (Muise, 2016). The majority of agriculture plastic waste is low value film and mixed plastics. Waste management groups that market film plastics in Nova Scotia sell to markets overseas, provided that the film plastics are clean and are not significantly degraded (Muise, 2016). For the residential sector, the majority of the plastics (including plastic film) would be accumulated through shops such as grocery stores. Many people in Nova Scotia buy beverage drinks meaning that there is a high majority that beverage containers of a resin code of #1 (PET or PETE) are in circulation in the residential sector. Plastic film for instance on toilet paper has a resin code of #4. Grocery bags which are used in most households in Nova Scotia have a resin code of #4. Yogurt containers have a resin code of #2. Bread bags such as Uncle Bens, Dempsters bread, and Villagio have a resion code of #4. The plastic film used to package Nobel Chef frozen turkey used a resin code of #4 as well. President's Choice (Superstore brand) frozen turkey did not mention the type of plastic film used. Plastic bag packaging for Robin Hood quick oats had a resin code of #7.

Do Producers Provide Information to Consumers on Recycling of Plastic Film?

As there is a different application for plastic films with different resin codes, it is important to be aware of the type of the plastic film in the recycling process. We collected a random sample of 150 products, with plastic film in them, from one of the retail stores on the Cape Breton Island to see whether or not more than 50% of the companies producing products with plastic film in them actually educate the consumers on recycling of plastic film, or provide any information at all on the type of the plastic film. We assume that different branches of a retail chain, located in different areas of the province of Nova Scotia, carry the same products meaning the same types of plastic film is in circulation.

At level of significance of 0.05, we test the following hypothesis. Decision rule is to reject the null hypothesis if the computed value for Z falls to the left of -1.645; otherwise to not reject H_0.

H_0: Equal or greater than 50% of the products with plastic film in them provided information regarding the type of plastic film and/or the recommendation for disposal.
$H_0: p \geq 50\%$

H_1: Less than 50% of the products with plastic film in them provided information regarding the type of plastic film and/or the recommendation for disposal.
$H_1: < 50\%$

The one-proportion Test Hypothesis is as follows.

$$Z = \frac{\bar{p}-p}{\sqrt{\frac{p(1-p)}{n}}} \quad \text{or} \quad Z = \frac{\bar{p}-p}{O_p}, \quad \text{where,}$$

p is the hypothesized population proportion parameter,

$\bar{p}$ is the sample proportion, and

n is the sample size.

O_p is the standard error of the population proportion computed by $\sqrt{\frac{p(1-p)}{n}}$.

($p = \frac{X}{n}$, X refers to the number of succeses, n refers to the number of observations).

$$p = 0.5$$

32 products out of 150 had information on recycling of plastic films, therefore,

$$\bar{p} = \frac{32}{150} = 0.213$$

$$n = 150$$

$$Z = \frac{\bar{p}-p}{\sqrt{\frac{p(1-p)}{n}}} = \frac{0.213-0.5}{\sqrt{\frac{0.5(1-0.5)}{150}}} = -7.024$$

Computed value of $Z = -7.024$ is in the rejection region so the null hypothesis is rejected.

There is not enough evidence to support the claim that 'equal to, or greater than 50% of the products with plastic film in them provided information regarding the type of plastic film or the recommendation for disposal'.

End Products of Plastic Film

According to a study by RSE USA (Film Recycling Investment Report, 2017), "*The Closed Loop Foundation Film Recycling Investment Report*" end uses of domestic recycled polyethylene plastic film include trash bags, construction film/sheeting, retail carryout sacks, pallet wrap, agricultural film, roofing tiles, industrial bags/sacks, guardrail offset blocks, composite lumber decking material (generally made from rough equal parts recycled film and recycled sawdust), transport packaging (pallets, slip sheets, trays, corner protectors). Virgin resin producers make tailor-make plastic resins for specific plastic product manufacturing technologies and for finished product performance requirements.

A vital measure for which plastic resins are suitable for different manufacturing technologies is the viscosity they have when melted. Some resins have the texture of maple syrup when melted; these resins are made for injection molding and rotational molding. Other resins are made to have the viscosity of chewing gum when melted so that the plastic bubble can be blown; these resins are designed for blown film and blow molding applications. Please refer to page 38 of the Film Recycling Investment Report by RSE USA Sustainable Product Solutions for more information on which plastics manufacturing processes and recycled content product categories are more favorable than others for the different film product types to be recycled.

The importance of recycling of mixed plastic film laminates in India for 2011 is discussed in (Sundaram M. P.). Post-consumer plastic waste accounted for more than 50% of the total plastics consumed in India. Industrial and post-consumer PE/PET/PP laminates also account for a large amount of wastes. Recycling PE/PET/PP waste laminates can offer a variety of mechanical properties such as moldable compounds with good tensile, bending, and impact properties. Such items that contain these recycled compounds are outdoor furniture, drainage pipe, brush bristles, crate handles, shipping pallets, electrical products, garden pavers.

Robotics

Development and design of an underwater fish robot that can withstand high water pressures is discussed in (Mizuho & Norimitsu, 2015). As a result of testing water quality, there have been many attempts to advance underwater robotics. The article states that smaller under water robotics are important because it allows for less disturbance (due to size) in the water while collecting data. The process of building the lightweight robotic fish is described in greater detail. The outer layer of the underwater robotic fish prototype is constructed out of thin plastic film, making the item light in weight. This helps with increasing energy efficiency when the robotic fish moves. The plastic film also provides a compact shell for the robotic fish rather than a bulky shell that most fish-like robotics have though it has less elasticity for flexibility than silicon. In order to protect the electrical part of the robotic fish, a seal machine and insulated fluid (i.e., industrial oil) are used to cut air from getting into the body of the underwater robotic fish. Another positive aspect of using plastic film for the outer shell is that it is not expensive. The plastic film used to cover the internal electrical organs of the fish was multilayered and made of polyethylene terephthalate (PET) of 12 u m thickness, low-density polyethylene (LDPE) of 20 u m thickness, and linear low-density polyethylene (LLDPE) of 50 u m thickness. The results included that thin plastic film used for the outer shell of an underwater robotic fish allowed the robot to be light weight and have a high resistance level to underwater pressure.

Composite Structures

Thermal, mechanical, and morphological properties of low-density polyethylene waste (LDPEW) and pine wood waste combined together are discussed in (Ashori & Nourbakhsh, 2009). There are excess resources of shavings from the production of pine pallets and plastic packaging (LDPE film) due to high consumption and that these 'waste materials' can be used for producing wood composites. Some materials included post-industrial low-density polyethylene waste from the production (extrusion) of plastic film and polyethylene- grafted with maleic anhydride (PE-g-MA). Pine wood waste (PWW) was generated from the manufacturing of pallets. Both materials (LDPEW and PWW) were then further processed for preparation and characterization of the composites. Tables were shown to compare the mechanical properties of tensile strength of the materials from tensile tests. Other testing included scanning electron microscopy (SEM) and thermogravimetric analysis (TGA). SEM was used to see how the materials performed under low temperatures and different fiber content. TGA was used to evaluate how the materials behaved when subject to heating processes.

Through testing of LDPEW and PWW, it could be seen that the material mix fluctuated with the change in the amount of fiber that was included in the material. It was shown that material with low fiber content (1.5-10%) could handle more pressure whereas material with high fiber content could not handle as much pressure. Thermal stability could also be seen in LDPEW and PWW through temperature changes in thermomechanical processing. Overall, LDPEW and PWW is cheap and there is plenty supply of both materials. Both materials can help reduce pollution by using them as recycled composites to produce such items such as composite lumber. It is beneficial to the environment and economy (Ashori & Nourbakhsh, 2009).

Concrete

The whole process of recycled plastics and the management of waste choices as well as the research done on how recycled plastic impact the making and final product of concrete are presented in (Siddique et al., 2008). The benefits of plastics are that they are hygienic and good to use as barriers (i.e., plastic around meat), some plastics are resistant to water and chemicals, plastics offer electrical and thermal insulation, and are durable and last long. Some disadvantages of plastics is that the plastics can contain harmful chemicals (i.e., colorants) and one of the largest problems is the disposal of plastics. Plastics take a long time to break down when they are put in the landfill. Therefore, there needs to be other ways in which plastic waste can be handled. This paper gives multiple ways for managing waste such as reusing plastics if possible (i.e., plastic bags) thus leading to decreasing the amount of plastic waste. Ways to recycle and make new products out of recycled plastic wastes include thermal processing which is melting the plastics at high temperatures. The melted plastic is then made into new products when the plastic starts to cool down. An example is PET (a thermoplastic polyester) that can be heated and made into fence posts, material for carpeting, and building panels. This process cannot be used extensively with the same product but can be used for recycled plastic wastes that might go in the landfill. One way of using thermo processing for a mixture of plastic waste could be using special machinery that takes into consideration the various thermal properties of the melting behaviour of the plastics wastes. Other ways plastics are being used is to replace wood products. This type of plastic is like wood but is more resistant to moisture but is more sensitive to temperature changes compared to wood. Types of products made from this material include park benches, curb stops, traffic posts, and fence posts. Products made from this material are usually 2 to 4 times than products that are the same made from wood. Plastic waste act as fillers mixed with other materials such as concrete. Contamination of plastic waste is not significant in this case. The benefit from adding recycled materials such as rubber with other materials in building roads include higher crack resistance for roads and less sliding on ice. Five properties of concrete are explored in this paper, e.g., bulk density, air content, slump, compressive strength, splitting tensile strength, modules of elasticity, impact resistance, permeability, and abrasions resistance.

It was concluded that plastic waste materials can replace typical material used in making concrete. Using plastic waste material can help reduce the bulk density. The plastic aggregates also decreased the levels of concert cracking and splitting, and the concrete mixed with plastic wastes has higher impact levels meaning it is more resistant to impact. Plastic waste is easily accessible, cheap, and plentiful and can benefit road construction. It is economical and environmentally friendly and as we have seen, it has many uses such as reusing plastic waste material to make other products (composite wood) and enhance the characteristics of concrete.

Construction

The issue of the lack of materials such as stones needed for road construction as well as alternative materials that can be used in the process of pavement construction are discussed in (Jince et al., 2018). The study indicates that the properties of brick aggregate bituminous mix can be improved by using polypropylene fibre which would be an efficient alternative for pavement construction. The paper focuses on the northeastern part of India in the state of Tripura where there is a lack of resources of stone aggregate, which means that stones have to be imported from other places in order to meet demand, increasing the cost of construction. This has forced innovation and using local, environmentally friendly, energy efficient, and cost-effective thinking among road developers. Brick aggregates offer a good alternative as it is not complex and economical to produce by burning earth to the desired forms. The study looks to find alternative materials instead of depending on the use of stone aggregate for construction of roads. It also

looks at the feasibility of using brick aggregate both normal and over burnt with fibre strengthen in pavement design.

Polypropylene fibers are widely used in concrete as a reinforcing agent and laboratory studies have proven that by using fibres for modifying bitumen binders to reduce cracks in the pavement it has provided good strength. The function of fibres as reinforcing materials are to give additional tensile (resistance of breaking under tension) strength and to increase the strain energy absorption of the bituminous mixtures. Fibers change the viscoelasticity of modified bitumen, increases dynamic modulus, moisture susceptibility, freeze-thaw resistance, and reducing the cracking of bituminous mixtures and pavements. They also tend to thicken the bitumen so it does not run from the aggregates during construction. Fibre can stabilize bitumen preventing leakage. Adding polypropylene fibres (which can be used for making polypropylene sheet) for reinforcing bituminous mixes increases the strength and durability of pavements and reduces the processing cost.

Conclusion

In this paper, we investigate plastic films as a part of the circular economy in the province of Nova Scotia, Canada, as well as different end-uses and applications for plastic films across different industries. We aim to find out the different types of plastic films, with different resin codes, currently in circulation in the residential sector in the province of Nova Scotia. Specifically, we are interested in determining whether consumers are provided with any information at all on the type of plastic films or recycling of plastic films found on consumer products. We feel that the products, with plastic film used in them, in the retail stores do not provide information to consumers regarding the type of plastic film or the recommendation for disposal. We test our hypothesis which is 'less than 50% of the products with plastic film in them provided information regarding the type of plastic film or the recommendation for disposal at 5% significance level.' The null hypothesis is 'equal to or greater than 50% of the products with plastic film in them provided information regarding the type of plastic film or the recommendation for disposal on a product'. In order to test our hypothesis, a random sample of 150 products with plastic film at a retail store on the Cape Breton Island were collected. The outcome of our hypothesis testing is that the null hypothesis is rejected indicating there is not enough evidence to reject our hypothesis.

We recommend that there should be policies to mandate companies, producing products with plastic film in them, to educate the consumers on the importance of recycling of plastic film as well as providing more information on the type of plastic film on the products' label given that there are different applications for different types of plastic film with different resin codes. This becomes more important if more *segregated collection procedures* for different recyclable products, including plastic film, is deployed in the future.

For future work, we recommend studying the impact of current blue-bag collection procedures on the cross-contamination level in plastic films, among other recyclables.

Acknowledgement

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THE IMPACT OF INTERSECTING IDENTITIES AND CONTEXT ON STUDENT EVALUATIONS OF TEACHING EFFECTIVENESS: A CRITICAL REVIEW[1]

Student evaluation of teaching effectiveness (SET) is an evaluation method used for measuring instructor performance, providing student feedback for instructor and course development, and providing information to future students for course selection. It has increasingly become an important determinant of hiring, promotion, and tenure decisions. Previous research has shown that SET is subject to many biases that are shaped by non-instructional factors such as instructor and student identities, class size, and students' grade expectations. This study employs an intersectional approach to conduct a multi-disciplinary review of studies published between 2007 and 2017 with the goal of understanding the impact of non-instructional factors on SET. The main findings are (i) female instructors and instructors who are ethnic minorities receive lower SET scores, (ii) instructor attractiveness is consistently positively associated with higher ratings after controlled for teaching effectiveness, (iii) there is an overwhelming focus on gender as an identity while other identities are in most part ignored, and (iv) the majority of studies are conducted in the U.S. The implications for researchers and instructors are discussed.

Introduction

The production and dissemination of information have become increasingly important in the post-industrialization era. Post-secondary institutions respond to the increased demand for information dissemination by putting more focus on effective teaching. As a result, a number of tools have been developed to measure teaching effectiveness such as peer ratings, instructor self-evaluation, student interviews, and employer ratings (Berk, 2005). Among these measurement tools, student evaluation of teaching effectiveness (SET) is the most commonly used tool.

SET is an evaluation method used for instructor performance measurement, providing information to future students for course selection, and course and instructor development (Sliusarenko, 2013). Many universities in North America, Europe, and Australia use SET as their primary tool to evaluate their instructors (Moore & Kuol, 2005). SET is an important determinant of employment outcomes for academicians such as hiring, promotion, and tenure decisions (Basow & Martin, 2012).

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[1] An earlier version of this paper was presented at the 2018 Annual Conference of the Atlantic Schools of Business.

While SET is widely used, it has been criticized by many. For example, Stark and Freishtat (2014) stated: "The common practice of relying on averages of student teaching evaluation scores as the primary measure of teaching effectiveness for promotion and tenure decisions should be abandoned for substantive and statistical reasons: There is strong evidence that student responses to questions of 'effectiveness' do not measure teaching effectiveness." (p. 2). Stark and Freishtat (2014) further state that a number of statistical issues such as response bias might be in effect for SET. There could be various non-statistical reasons behind this measurement problem as well. Two potential problems fall under the scope of this review. First, the identities of instructors and students might shape SET. Instructor identity such as gender/sex and ethnicity might be potential biasing factors that shape SET (Basow & Martin, 2012). Second, contextual factors such as class size, department, and time of class might have a significant impact on student evaluations (McManigell Grijalva & Glau, 2015).

This study reviews the recent literature (2007-2017) on the impact of non-instructional factors on SET using intersectionality as a conceptual framework. The main goal is to review the recent literature to bring together the findings, synthesize them from a critical perspective, and derive implications for the stakeholders such as researchers, instructors, and university administration. With its focus on identities and context, intersectionality provides a solid framework for the current study. The paper is organized as follows. First, intersectionality is introduced. Second, the methods followed conducting the review are discussed. Third, the results are explained. The study is concluded by discussion of the findings and limitations.

Theoretical Background

Intersectionality does not have a clear definition (Woodhams & Lupton, 2014) and there is no consensus on the definition of intersectionality (Corlett & Mavin, 2014). Among many other descriptions, intersectionality has been described as a paradigm, framework, theory, lens, and perspective by different researchers (Hulko, 2009). Bowleg (2012) declares that because intersectionality has neither core elements nor variables that can be operationalized and tested, it is impossible to define intersectionality as a theory. Similarly, Cole (2009) points out that intersectionality does not lead to a method or data analysis technique. Rather, "[…] intersectionality entails a conceptual shift in the way researchers understand social categories." (Cole, 2009, p. 178).

There are three central principles of intersectionality: social groups are not homogenous, unexpected outcomes might be observed when multiple identities intersect, and context shapes the impact of intersectionality on individuals (Bauer, 2014; Stewart & McDermott, 2004). Each principle is explained below in detail.

First, social groups are not homogenous. For example, in addition to their ability status, people with disabilities have other identities such as gender, ethnic background, type of disability, age, sexual orientation, and immigrant status among many other identities. Aggregating individuals into one group based on only one of their social identities is problematic because such an approach does not reflect the complexities of social life. That is to say, different combinations of intersections

can lead to different outcomes and different experiences; aggregating them into one group prevents researchers from truly understanding the realities of individuals. This is in accordance with simultaneity, which is a crucial intersectionality concept (Holvino, 2010). Simultaneity claims that all relevant identities should be included in the analysis (Veenstra, 2011).

Second, because intersectionality can lead to unexpected results, determining intersections prominent in a project a priori is not always possible (Warner, 2008). Intersectionality states that when different identities come together or intersect, the total impact can be more than the sum of each identity's impact. The implication for researchers is that researchers should empirically test and challenge even the most a priori expected results.

Third, Hulko (2009) states that contextual factors such as temporal, historical, and geographical dimensions mold our identities. Context, therefore, shapes the nature of inequality (McCall, 2005). Intersectionality is context-dependent and can lead to advantage (opportunity) and disadvantage (oppression) depending on the context (Warner, 2008; Zinn & Dill, 1996). Thus, context is a core component of intersectionality and should be included in the analysis.

Based on the principles summarized above, I define intersectionality as a theoretical framework that enables a concurrent study of multiple identities that also includes context into the analysis. In this study, I use intersectionality as a theoretical framework by including studies that take into consideration multiple identities of instructors and students as well as contextual variables that shape SET.

Methods

This study employs a multi-disciplinary intersectional and critical approach to review peer-reviewed articles and graduate theses on the non-instructional factors shaping SET. There can be numerous non-instructional factors that affect SET such as the department of the course and classroom size. Nevertheless, the primary focus of this review is on intersecting identities of both instructions and students. Intersectionality implies that there are no identities that are more influential or important than others. Therefore, this review does not limit its scope to any identity. All identities including sex, gender, race, ethnicity, age, ability, and sexual orientation are considered in this study.

The following keywords were searched in Google Scholar for studies published between 2007 and 2017: student evaluations of effective teaching, effectiveness, rating, SET, ratemyprofessors.com, ratemyprofessors, rate, my, professors, diversity, gender, race, ethnicity, age, tenure. The search yielded 79 articles. Furthermore, each article's reference list was checked. Each article was reviewed to ensure it is related to the topic at hand. The focus of this review is limited to quantitative articles. Therefore, conceptual and qualitative articles were removed from the final list. The articles that were not in English were also excluded. The final number of articles included in this review is 17.

Once the articles were finalized, each article was coded by the following variables: year of publication, type of publication (journal, thesis, conference paper, working paper), statistical techniques used for analysis, data source (SET, ratemyprofessors.com, experiment, survey). Furthermore, each article was also coded in terms of its inclusion of variables: instructor identities, student identities, other related variables, type of institution (university, liberal arts college), department, and country. Finally, the author reviewed each article to assess whether they were intersectional or not. An article was considered an intersectional article if it included both core components of intersectional analysis (i.e., concurrent analysis of multiple identities and contextual variables) into the analysis. If an article included only one component of intersectional analysis, it was coded as 'partially intersectional.' If an article did not include either component, it was coded as 'not intersectional.'

Results

The studies reviewed in this article can be seen in Table 1, provided as Appendix 1 at the end of this article.

As can be seen from Table 1, the search yielded no results in 2007, 2008, and 2009. Each year between 2010 and 2015 did not have more than two publications. Nevertheless, a recent increase of interest in the topic at hand can be observed: six studies were published in 2016. This recent interest can be attributed to the increasing interest in diversity issues as a result of increasing global diversity.

Of 17 studies, 11 are articles published in peer-reviewed journals, three are theses, two are research/working papers, and one is a conference paper. While the majority of the articles are published in education journals such as the Journal of Diversity in Higher Education and College Student Journal, there are also studies published in other disciplines such as Language in Society and Social Science Research. The variety of journals publishing on this topic demonstrates that people from different disciplines are interested in this topic.

The variety of statistical techniques employed in the reviewed studies reflects the multi-disciplinary nature of this review. Some studies include advanced statistical techniques such as ordered probit and quantitative linguistic corpus analysis; some other include only basic statistical techniques such as correlation and ANOVA. Overall, the majority of studies did not include rigorous statistical techniques.

The studies mainly used four sources of data: SET scores, student ratings from ratemyprofessors.com, experiments, and surveys. Eight studies used only SET scores, three studies used only ratings from ratemyprofessors.com, two studies only used surveys, and one study used only experiment. Three studies used two sources of data. This demonstrates that actual SET scores were used for analysis in the majority of the reviewed studies.

All studies except for one study included instructor gender/sex into the analysis. Other instructor identities examined were ethnicity, attractiveness, age, and linguistic background (i.e.,

whether English is the instructor's first language). Regarding student identities, 10 studies employed a relational approach and included student identities in their analyses. Of these 10 students, nine studies examined only gender/sex. The remaining study included student race and age in addition to student gender/sex. Overall, a pattern emerges: gender/sex is the most studied identity for both instructors and students. There are also other studies that examine other identities, yet the number of such studies is limited.

While conducting the review, contextual and other related variables included in the reviewed studies were also examined. Overall the following contextual and related variables were found in the reviewed articles: instructor's department, instructor's rank, course type, course level, core/non-core course, grade expectations of students, semester of the course, and time of day of the course. Nine studies included one or few of these variables in their analyses and eight studies did not include any contextual variables. This implies that most studies did not take or marginally took into consideration the classroom and institutional context or other related variables.

Regarding the type of institution analyzed, 11 studies had a focus on universities whereas three studies examined liberal arts colleges. Two studies did not state the type of analyzed institution and one study collected its data from senior high school students. Most studies derived its data from students from multiple departments. Three studies had data from business school students whereas three studies included students only from political science, mathematics, and psychology departments respectively.

As seen in Table 1, 12 studies were conducted in the U.S. The remaining studies were conducted in Italy, France, Netherlands, and Germany. This result may imply that the post-secondary institutions in the U.S. are more likely to use SET as an instruction evaluation tool than the rest of the world.

Finally, based on the author's definition of intersectionality, none of the reviewed articles were intersectional. Seven studies included either concurrent analysis of multiple identities or contextual variables into their analyses and they were considered partially intersectional. The remaining 10 studies had neither intersectionality analysis components. Therefore, they were not considered intersectional.

Overall, a pattern of three main findings emerges from the reviewed articles. First, while there are a few exceptions (e.g., Huebner et al., 2015; Sohr-Preston, 2016), most studies found that female instructors received lower SET scores than their male counterparts (Fenn, 2015; Bavishi et al., 2010; Martin, 2013). Furthermore, this rating gap increases with the class size. In other words, it was found that the smaller the number of students registered in a course, the lower the rating gap between female and male instructors. An interesting intersectional finding by Bavishi et al. (2010) was that female black instructors received the lowest scores among the four sub-groups (i.e., male white, female white, male black, female black) but another study associated male black instructors with lowest SETs (Reid, 2010). Therefore, it can be concluded that the results might differ based on the institutional and classroom context. A related finding was that male professors perceived as more knowledgeable and having stronger class leadership skills. In regards to student sex/gender, it was found that male (and sometimes female) students likely to rate male instructors more

favourably (Bonitz, 2011; Basow et al. 2013; Boring, 2017; Mengel et al., 2016). Second, ethnic minorities consistently received lower evaluations (Bavishi et al., 2010; Subtirelu, 2015). Third, instructor attractiveness was consistently associated with higher ratings after controlled for teaching effectiveness (Ponzo et al. 2013; Wolbring et al., 2016).

Discussion

This study employed an intersectional approach to conducting a multi-disciplinary review of studies published between 2007 and 2017 to understand the impact of non-instructional factors on SET. It was found that female instructors and instructors who are ethnic minorities receive lower SET scores, instructor attractiveness is consistently positively associated with higher ratings after controlled for teaching effectiveness, there is an overwhelming focus on gender as an identity while other identities are hardly examined, and the majority of studies were conducted in the U.S. Other findings indicated that there is a recent interest on the non-instructional factors on SET scores, yet few studies had an intersectional approach. Furthermore, most of the studies included in this review did not have a high level of statistical rigor.

In the author's best knowledge, there were no reviews on the impact of non-instructional factors on SET from an intersectional perspective. This study contributes to the education and diversity literature by bringing together recent quantitative studies on the non-instructional factors on SET scores, analyzing these articles from different perspectives, synthesizing the findings, and laying the foundation for future studies on this topic. This review provides further evidence that SETs are shaped by non-instructional factors, which affect instructors with multiple disadvantaged identities more negatively than others. Thus, SETs are of intersectional nature.

Several research implications can be derived from this study. First, this review could not find any research that employed an intersectional approach. To understand the complexities of identities and the impact of context, intersectionality should be used as an analytical tool. It is encouraged that future studies employ an intersectional approach when studying the impact of intersecting identities on SET scores. Second, the majority of the studies were conducted in the U.S. Researchers should consider conducting similar studies on other countries so that there will be a better understanding of the impact of the country (e.g., institutional and historical differences) and national culture on SET scores. Third, while gender/sex is an essential identity, researchers should examine other identities as well. Finally, researchers are encouraged to conduct their analysis using more rigorous statistical techniques for more accurate results.

There are also implications for instructors and university administration. First, the instructors should be aware of the non-instructional factors that affect their SET scores. This can help them to evaluate teaching effectiveness of themselves and other instructors. Second, while the instructors cannot and should not be expected to change their identities, they can try to manage other factors such as time of class, class size, and students' grade expectations to receive higher SET scores. Furthermore, they might be able to use some impression management tools such as strategic language choices like use of slang to shape SET (Brown, 2016). University administration

should also be aware of the impact of non-instructional factors on SET scores. After acknowledging this to students and instructors, university administration can use other evaluation and development tools in addition to SET to ensure the instructors are evaluated by their performance but not by who they are. Furthermore, university administrations should consider evaluating instructors' teaching effectiveness with complementary practices such as peer evaluation, rater training, and external validation by professional bodies (O'Brien & Pancer, 2014).

As in all studies, this study is not free of limitations. First, this review was not conducted systematically. As a result, it is likely that a number of related studies could be left out. Second, the search for articles was conducted using only Google Scholar while other research databases were excluded. Third, this study was limited to the studies published between 2007 and 2017. Future studies can extend the current study by following a systematical review approach that includes articles obtained from multiple databases with more keywords and a wider period of publication.

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APPENDIX 1

Table 1: The studies included in this review

Authors	Year	Type of outlet	Name of the outlet	Instructor identities analyzed	Student identities analyzed	Related variables	Type of institution	Department	Statistical Technique	Country	Data source	Intersectional study
Reid	2010	Journal article	Journal of Diversity in Higher Education	gender, race	N/A	none	liberal arts college	multiple departments	correlation, ANOVA	U.S.	Ratemyprofessors.com	partially intersectional
Bavishi et al.	2010	Journal Article	Journal of Diversity in Higher Education	gender, race	N/A	instructor's department (science and humanities)	high school	N/A	MANOVA, structural equation modeling	U.S.	Survey	partially intersectional
Bonitz	2011	Master's thesis	N/A	gender	Gender	course type	university	Multiple (introduction to psychology students)	ANOVA, correlation, multivariate regression	U.S.	Survey	not intersectional
Martin	2013	Conference paper	American Political Science Annual Meeting	gender	N/A	class size	university	political science	Regression	U.S.	SET	partially intersectional
Basow et al.	2013	Journal article	College Student Journal	race, gender	gender	none	liberal arts college	multiple departments	correlation	U.S.	Experiment	not intersectional
Ponzo et al.	2013	Journal article	The B.E. Journal of Economic Analysis & Policy	physical attractiveness, gender	gender	none	university	multiple departments	OLS regression	Italy	SET	not intersectional
Nargundkar et al.	2014	Working paper	N/A	gender	none	course type, course level, instructor rank, semester, time of day	university	School of business	t-test, regression	U.S.	SET	partially intersectional

Fenn	2015	Journal article	International Review of Economics Education	ethnicity, sex	gender	instructor's tenure, students' grade expectations, student rank, semester of the course	liberal arts college	department of economics and business	ordered probit	U.S.	SET	partially intersectional
Subtirelu	2015	Journal article	Language in Society	ethnicity, linguistic background	N/A	none	not stated	mathematics	quantitative linguistic corpus analysis, critical discourse analysis	U.S.	Ratemyprofessors.com	not intersectional
Huebner et al.	2015	Journal article	Open Journal of Statistics	gender	gender	core/non-core course, expected grade, student rank	university	multiple departments	OLS regression	U.S.	SET	partially intersectional
Sohr-Preston et al.	2016	Journal article	Higher Learning Research Communications	gender, perceived age, attractiveness	gender, race, age	none	university	psychology	MANCOVA	U.S.	Ratemyprofessors.com, experiment	partially intersectional
Wolbring et al.	2016	Journal article	Social Science Research	physical attractiveness, gender	gender	none	university	multiple departments	regression	Germany	SET, experiment	not intersectional
Boring et al.	2016	Journal article	Science Open Research	gender	gender	department, students' grade expectations	university	multiple departments	permutation test	U.S. and France	SET, experiment	not intersectional
Sinha	2016	Master's thesis	N/A	gender	N/A	department	not stated	not stated	text mining, logistic regression	U.S.	Ratemyprofessors.com	not intersectional
Terkik	2016	Master's thesis project	N/A	gender	N/A	none	university	multiple departments in the faculty of science	sentiment analysis	France	SET -used originally in Boring et al. (2016)	not intersectional
Mengel et al.	2016	Working paper	N/A	gender	gender	professor rank	university	School of business and economics	multivariate regression	Netherlands	SET	not intersectional

Boring	2017	Journal article	Journal of Public Economics	gender	gender	none	university	first year undergraduate students from various departments	fixed effects and generalized ordered logit regression	France	SET	not intersectional

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A CRITICAL DISCOURSE ANALYSIS OF WOMEN AND LEADERSHIP IN MANAGEMENT TEXTBOOKS

This study explores the ways in which management textbooks portray women in case study examples. Specifically, this research looks at whether women are cast in leadership or followership roles, and studies the language used to engender such experiences. This research finds that women are underrepresented in the case studies analyzed, and that when they are present, women are often negatively portrayed as inept and incompetent.

Introduction

This research provides valuable insight into the knowledge base regarding gender in leadership education. It is crucial to understand how power dynamics are created in everyday life, as it is the first step towards changing unfair systems. Education can form and shape opinion, so in order to understand the result, one must look at the cause. A topic such as this is relevant because women are a minority in terms of workplace leadership (Daily Commercial News, 2012). One explanation for this imbalance may come from education through textbooks. The discourse used and stories told about women in management textbooks can directly impact workplace leadership, which underlines the importance for representative, diversified, and inclusive learning materials. This research explores a sample of case studies to better understand whether there is an attempt to reinforce injustice, or instead combat it by refusing to describe women in ways that reinforce gender inequality in the workplace. From a social standpoint, it is hoped that there will be no discrepancy between the discourse used to describe men and women in business scenarios.

Literature Review

The overarching purpose of this study is to strengthen the knowledge base regarding the intersection of the following two areas: gender in leadership and gender in education. In respect to the literature in the juncture of these areas, a gap in the knowledge base has been displayed. This study aids in closing said gap, which furthers its meaningfulness. The literature available that is relevant to this research will now be discussed

Gender in Leadership

In order to understand the basis of this research, it must be recognized that women are a minority in terms of leadership roles in professional settings. It was found that in S&P 500 companies, women's representation was at 39.6% at first and mid-level management positions, and 26.5% in executive or senior level positions (Catalyst, 2019). Further, only 5.0% of CEO positions were held by women (Catalyst, 2019). In other words, although women are exhibited in managerial positions, their representation at the top "is still sparse" (Blau & Winkler, 2018).

Additionally, "in Canada and around the world", 10% of businesses have female CEOs (Daily Commercial News, 2012). These numbers are staggering and display a significant gender inequity in business management and leadership roles. This sense of discrepancy is strengthened by a 2004 study, which found that only 14.4% of corporate officer positions in the National Post's Financial Post 500 list were held by women (Canada NewsWire, 2005). When one compares these numbers to more recent research, such as that only two of Canada's 100 highest-paid CEOs are women, this ongoing gendered bias is clear (Evans, 2017). This inequality proves harmful, as women who do not see themselves represented in leader roles are less likely to apply for authority positions themselves (Carrell, 1991).

Gender in Education

One way in which gender inequality is harmful stems from the phenomenon that many women are enrolling in post-secondary studies and striving to climb the corporate ladder. In fact, in Canadian undergraduate university programs, enrolment is higher among women than men (Hunt, 2013). In these same universities' business management programs, 54% of enrolment is female (Hunt, 2013). Although a higher percentage of women are preparing for successful business careers through university education, it was found that both men and women viewed males as having a higher chance at success in their career (Hunt, 2013). This learned behavior may result in real-world bias when these students enter the workforce.

To set a knowledge basis of previous gendered representation in textbooks, one must look at an early study, discussing how sexist language found in professional writing textbooks of the 1930s-1950s have perpetuated gender stereotypes. It was found that women were described as "emotional, subservient, and frivolous" and men were "effective leaders in upper level positions" (Carrell, 1991). In addition, it was found that in these texts, women were portrayed as "existing solely for the service of men" (Carrell, 1991). These findings are relevant to this study, as they establish a base in time wherein extreme gender inequality existed in textbooks. Conducting a similar study now brings this conversation into the present era.

To contrast these early findings, more recent research found throughout a business studies textbook analysis that men were often depicted in both middle and top management roles (Pillay, 2014). In the sample, men were business owners fifty-eight times, whereas there was only one example of a female business owner (Pillay, 2014). Additionally, women were often described as low-skilled (Pillay, 2014). Although this is an improvement from women "existing solely for the service of men", the textbooks analyzed still failed to describe women in an empowering way (Carrell, 1991). This study allows for further academic discussion in the area.

Literature Review Conclusion

This literature review has made it clear that gender inequality in workplace education materials is rampant. By examining the literature, it can be seen that harmful gender bias in the workplace exists, despite a growing number of women preparing to enter the workforce by pursuing a university education. One cause of this discrimination may come from what students and workforce members are taught through educational texts. This literature review displays that research pertaining to the language used to describe women leaders and followers in case studies within management textbooks relates to the existing academic debate. However, it is clear that there is need for studies which are both quantitative and qualitative in nature, that focus specifically on management texts. This need to fill the knowledge gap makes this research especially valuable.

Research objectives. The purpose of this study aims to explore the quantitative and qualitative ways in which women are described in various management textbook. Specifically, the research will look at how women are described as both leaders and as followers. The research objectives are to:
1. Establish the extent to which women are depicted as leaders and followers within the case studies of management textbooks.
2. Examine the language used in management textbooks to describe women's personalities and actions performed in leadership and follower roles.

Hypotheses development. Prior to conducting this research, it was imperative to outline various hypotheses of both quantitative and qualitative natures. In order to be able to test and compare significant results, multiple hypotheses were launched.

Hypothesis 1: Women will be represented in close to 50% of all cases. The first hypothesis of this study related to the quantitative representation of women. It was believed that as rates of female enrolment in post-secondary degrees, and specifically within business programs, are on the rise, that curriculum and learning materials would reflect such diversity (Hunt, 2013). Despite this change in the learning environment, most positions of workplace leadership are held by men (Daily Commercial News, 2012). It was the comparison of these two competing realities that led to hypothesizing that the representation of women within the sample case studies will occur close to 50% of the time.

Hypothesis 2: Women will be described as followers more often than not, and will be described as neutrally obedient. The second hypothesis of this study moved forward with quantitative analytics and additionally focused on the qualitative aspects of the research. As previously mentioned, although women are entering the workforce, they are still a minority in workplace leadership (Daily Commercial News, 2012). This led to the belief that women would be portrayed as neutrally submissive and subordinate members of the case studies more often than not. This connects to concepts discussed in gender role theory, and the social attitudes that women are generally non-confrontational and compliant (Wetherell, 1998).

Hypothesis 3: Women will be described as leaders less often than not, and will be portrayed as bossy, as opposed to productive. The third and final hypothesis of this study

included a general quantitative assumption, in connection with a specific qualitative assessment. For continuity's sake regarding the second hypothesis, it must also be said that women will be described as leaders less often. However, when female leaders are present in the sample cases, it is expected that the discourse will be negative. This assumption was developed out of gender role theory, and the societal attitudes which suggest that women displaying leadership skills are more problematic than their male counterparts (Wetherell, 1998).

Methodology

Research Context

The sample population for this research comes from business management textbooks. These specific textbooks were selected as many of them are used at the undergraduate level. As this descriptive study involves examining management textbooks both quantitatively and qualitatively, it is crucial to understand why such materials were chosen. Textbooks are valuable to inspect through critical discourse analysis as they are common materials used for learning, and because they transmit cultural values. In a general sense, education uses curriculum to display various learning expectations that "society and the educational community" deem appropriate (Reys, 2003). Textbooks are one method of transmitting such intended curriculum. They are particularly important as teachers "often only teach the content that is found in their textbook" (Reys, 2003). For this reason, it is imperative to ensure these cultural transmissions are providing students with positive messages that lead to a better future. It was decided to examine case studies in particular, as they provide a descriptive viewpoint. This research is highly based around the idea that language tells a story, and wants to see whether the narrative is positive, or continues to perpetuate negative gender stereotypes.

Theoretical Perspective

The methodology in this study centers on feminist critical discourse analysis and feminist post-structuralism. Additionally, sex and gender role theory will be used in a supplementary manner. It is crucial to recognize that it is the coupling of these analytical lenses that has allowed for a comprehensive perspective. Investigation is done by "carving out a piece of the argumentative social fabric for closer examination", and in order to fully grasp the research, a combination of these two perspectives must be utilized (Wetherel, 1998).

Post structuralism. Post structuralism "acknowledges discourses and practices of struggle and resistance" (Kenway, 1994). Post structuralism also allows for discussion and understanding of "why this utterance is here" (Wetherell, 1998). To get to the root of social issues, one first must understand what exactly is going on, and post structuralism allows for just that. By recognizing the "dynamic interplay of social forces", post structuralism can be used "as a theory of and for change" (Kenway, 1994). The most foundational and core purposes of post structuralist theory address "radical change" and analysis that "emphasizes structural conflict, modes of domination, contradiction and deprivation" (Burrell & Morgan, 2017). Furthermore, post structuralism focuses "upon the structure and analysis of power relationships" (Burrell & Morgan,

2017). This understanding and knowledge of what constitutes the distribution of power allows for investigation and suggestions on how to disrupt oppressive systems. The ability of post structuralism to bring about radical change is exactly what this research aims to do, in that in order to change the distribution of power amongst gendered management roles, there needs to be a change in the systematic approach of education. By firstly understanding the existence of power dynamics in business management in relation to gender, one can then suggest methods of radical change.

Feminist post structuralism. Feminist post structuralism "acknowledges the complex ways" that institutions, power, and gender interact, which is especially useful for understanding the "process of gender reform" (Kenway, 1994). Further, "gender is seen as unstable and constituted by discourse", in that we "cannot really say something about gender as such, out there, outside representations" (Alvesson & Due Billing, 2009). As this research is specifically focused on gender bias, and the ways institutions teach students about the systematic barriers that exist, it is crucial to make this feminist distinction when discussing the analytic lenses that have been used.

Discourse analysis. As previously mentioned, multiple analytical lenses have influenced this research, one of which stems from discourse analysis. Discourse analysis aims to understand meanings and relationships between sentences and words, and how these meanings are meant to be intended or justified (Schiffrin, 2008). In other words, discourse analysis tries to understand how words can be interpreted, and what consequences those interpretations can have on situations. Furthermore, discourse analysis assumes that "actions, objects and practices are socially constructed", and that they are specifically shaped by the "social and political context" of the times (Fischer, 2003). This suggests that if discourse is socially constructed, it can be socially deconstructed and changed. Discourse analysis is useful in terms of this research, as the intention of this project is to analyze the depictions of women through the use of words, specifically recognizing that every word examined will be "serving a function" (Savaria & Monteiro, 2017). One can use discourse analysis to help understand why certain genders are described in particular ways, and what meanings these descriptions take on. Discourse analysis helps the researcher understand the consequence of these meanings.

Critical discourse analysis. Now that an understanding of discourse analysis has been achieved, one must realize that this research methodology is better suited by critical discourse analysis. The major difference that critical discourse analysis proposes is that the methodology is used to develop "change through critical understanding" (Dijk, 1993). It is also said about critical discourse analysis that political stance and perspective when conducting the research will align with those that suffer from inequality (Dijk, 1993). In the case of this research, those that suffer from inequality are women in the workplace. This has been displayed repeatedly throughout the literature review, so it is expected that the research results will coincide with previous findings. Moreover, critical discourse analysts aim to produce change by targeting the elite or powerful class that "enact, sustain, legitimate, condone, or ignore social inequality and injustice" (Dijk, 1993). In relation to this study, the elite group that contributes to social inequality would be the creators and publishers of the textbooks examined. Therefore, studies such as this, that use critical discourse analysis to expose social injustice, bring the conversation one step closer to a monumental change.

Feminist critical discourse analysis. To develop a true understanding of this study, it must be distinguished that this critical discourse analysis is feminist. Similar to the notes made about feminist post-structuralism, it is crucial to differentiate that the focus of this research on gendered issues makes it feminist. It can be said that "to do feminist research is to put the social construction of gender at the center of one's inquiries", which is precisely what this research does (Lather, 1991). For these reasons, it must be stated that this critical discourse analysis is feminist as well.

Sex and gender role theory. Sex and gender role theory is one of many behavioural leadership theories, but is applicable particularly in the case of this study. Gender role attitudes are often used in order to understand the traditional societal perspective of "women as homemakers and men as breadwinners" (Van Der Horst, 2016). Gender role theory additionally examines the roles that are "considered appropriate for men or women" (Van Der Horst, 2016). This theory aims to understand that it is the societal attitudes towards certain roles that engenders them. This theory is relevant to the research as it connects to the ways in which women's gender roles are portrayed in management textbooks.

Analytical Framework and Research Questions

This research involves the examination of 100 case studies from management textbooks. In order to efficiently gather data relevant to this study, there are various steps to the analytical framework which break down and eliminate certain irrelevant information.

The data collection began by selecting 100 cases to examine – ten cases from each of the ten textbooks chosen for the study. The textbooks designated for review are noted in Appendix 1. For each textbook, chapters were numbered, and then through a random number selector, ten of these chapters were selected. The first case from each of these chapters were the ones designated for further analysis. Once these 100 cases had been picked, the researcher read each one in order to find female characters. Case studies that mentioned female actors were noted, and used in later steps for analysis. The case studies that did not mention women were recorded in order for quantitative representation examination, but not for further qualitative analysis. Upon the completion of this process, the researcher began an in-depth analysis which involved the reviewing of each case again, and a particular focus on each of the following research questions:

1. Is there is a quantitative gender imbalance in terms of representation in general? To what extent?
2. Is there a quantitative gender imbalance in terms of representation specifically in leader and follower positions? To what extent?
3. What ways in which are women described in leadership and followership positions? Are these descriptions positive, neutral, or negative?

Positive descriptions reinforced power and strength, negative descriptions related to weaknesses and ignorance, and neutral descriptions fit neither of the preceding categories. These descriptions are expanded upon in the results section. The researcher responded to these questions specifically by referencing the case studies. The use of direct quotations was particularly important

because of the significance of discourse to this study. The last step of analysis involved the researcher bringing together all of the data in order to discuss hypotheses, research objectives, and any other pertinent matters.

<div align="center">

Results, Analysis, and Discussion

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Cherry-Picking

As this study involves the examination of a hefty amount of discourse, some may believe that by analyzing only selected quotations that there is some personal bias, or cherry-picking that must occur. Therefore, it is vital to provide a disclaimer about the approach used prior to discussing results. One of the "cardinal skills of qualitative research" is to be able to "sift through masses of mundane and predictable material" in order to find the "few cherries that open up paths to genuine understanding" (Gabriel, 2014). It is important to clarify that the analysis of specific quotations from selected case studies is therefore not a result of personal bias, but actually a necessary skill of qualitative researchers.

Results

Analyzing 100 cases, from ten different management textbooks, resulted in a plethora of data to analyze. In order to minimize bias, it was critical to examine each case study individually, and then conduct an additional inspection in order to identify key themes. Through such assessment, three major themes emerged.

Theme 1: Exclusion of female characters. The first major theme to arise through analysis was that of the quantitative exclusion of female characters. It was common practice amongst the sample cases to fail to mention women at all. In fact, 64 of the 100 selected cases had no female characters. These examples of exclusion were categorized into three sections: mild, moderate, and extreme. Cases were mildly exclusionary if they included 1-2 male or non-gendered characters and no women. Cases were ranked as moderate if they had 3 male or non-gendered characters and no women. Cases were extreme if there were 4 or more male or non-gendered characters and no women. Non-gendered in this case means that the character was not provide with a name, nor gendered pronouns. The quantitative breakdown of this first theme can be seen in Table 1:

Table 1
Exclusion of Female Characters

Textbook Information	Examples of Female Exclusion		
	Mild	Moderate	Extreme
Sales Management in Canada (MacKenzie, 2008)	3	1	1
Leadership Theory & Practice (Northouse, 2012)	2	0	0
Organizational Behaviour (Neubert et al., 2016)	4	2	3
Essentials of Organizational Behaviour (Robbins, 2016)	4	0	2

Honest Works: A Business Ethics Reader (Ciulla, et al., 2014)	5	3	0
OM4 (Collier & Evans, 2014)	5	0	2
Human Resource Management in Canada (Dessler & Chhinzer, 2016)	3	0	0
Project Management: Achieving Competitive Advantage (Pinto, 2019)	7	0	0
Organizational Behaviour (King, 2016)	5	3	2
Ethics, Responsibilities, & Sustainability (Sexty, 2017)	6	0	1
Segmented Totals	*44*	*9*	*11*
General Total #	*64*		

Theme 2: Incompetent female leaders. In a quantitative sense, only 29 of 100 cases included female leaders. Although some of these cases portrayed women in neutral and positive manners, they mostly were described in an overwhelmingly negative sense. 17 of the 29 cases described female leaders to some degree of incompetency. Cases of female leaders' incompetency was ranked as mild, moderate, and extreme. Mild examples of incompetency arose in cases wherein the female leader makes excusable and minor mistakes to which they make a conscious effort to fix. Further, if this leader needed a low amount of help from coworkers to correct the error, their incompetency was rated as mild. Examples were ranked as moderate if the character made significant mistakes, but made somewhat of an effort to correct them. These mistakes would often be the main problem in the case, and in some occasions coworkers and other characters would need to contribute significantly to repair the problem. Extreme examples of female leaders' incompetency were illustrated by such characters being unjustly unfair to their followers, making inexcusable mistakes and putting in no effort to correct them, as well as displaying little-to-no leadership skills. The quantitative breakdown of the second theme can be found in Table 2. Textbooks that had no female leaders were not included in the table.

Table 2
Incompetent Female Leaders

Textbook Information	Examples of Incompetence		
	Mild	Moderate	Extreme
Sales Management in Canada (MacKenzie, 2008)	1	1	1
Leadership Theory & Practice (Northouse, 2012)	2	1	1
Essentials of Organizational Behaviour (Robbins, 2016)	0	1	1
Honest Works: A Business Ethics Reader (Ciulla, et al., 2014)	0	0	1
Human Resource Management in Canada (Dessler & Chhinzer, 2016)	2	0	1
Project Management: Achieving Competitive Advantage (Pinto, 2019)	0	1	1
Ethics, Responsibilities, & Sustainability (Sexty, 2017)	0	0	2
Segmented Totals	*5*	*4*	*8*
General Total #	*17*		

Theme 3: Females as supporting cast members. The third qualitative theme, and final theme overall, related to female followers. Often times, women were seen as supporting, rather than principle, characters. Of the 36 cases studies that included female characters, 20 of them included women in supporting roles. These examples of women as supporting cast members were ranked as negative, neutral, and positive. Negative examples were classified as including discourse that described women as the root cause of the case's problem, that they showed no initiative, or that they are difficult to work with. Additionally, women who were described as central supporting cast members but given only female pronouns rather than a name were seen as negative. This is because by giving a woman an important part in a story, but failing to recognize her by name is a micro-aggression and a form of delegitimization. Female supporting cast members were ranked as neutral if they had no significant impact on coworkers, or on the problem at hand. They were characterized as fading into the background as neither important nor insignificant. Discourse surrounding female supporting cast members was categorized as positive if these characters showed initiative, did their work properly, were good influences on fellow workers, or pleasant additions to the workforce. The quantitative breakdown of the third theme can be found in Table 3. Textbooks that had no supporting female characters were not included in the table.

Table 3
Female Supporting Cast Members

Textbook Information	Supporting Cast Descriptions		
	Negative	Neutral	Positive
Sales Management in Canada (MacKenzie, 2008)	4	0	2
Leadership Theory & Practice (Northouse, 2012)	2	0	3
Honest Works: A Business Ethics Reader (Ciulla, et al., 2014)	1	0	0
OM4 (Collier & Evans, 2014)	1	0	1
Human Resource Management in Canada (Dessler & Chhinzer, 2016)	3	0	0
Ethics, Responsibilities, & Sustainability (Sexty, 2017)	3	0	0
Segmented Totals	*14*	*0*	*6*
General Total #	*20*		

Standout Quotations

The first research objective of this study is to establish the extent to which women are depicted as leaders and followers within the case studies of management textbooks. This can be explained further by discussing examples mild, moderate, and extreme examples of female exclusion that was found in the data.

Theme 1: Female exclusion. As Theme 1 focused solely on quantitative metrics, there are no quotations to discuss in this section.

Theme 2: Incompetent female leaders. *"Raechel found she was occasionally having difficulty managing her inventory of beverages and food items" (Sales Management in Canada, p. 117).* This quotation was an example of mild incompetence amongst female leaders. This is particularly because although Raechel's lack of organization caused a problem within the case study, she makes a conscious effort throughout the story to correct it, and does not need any significant help from her coworkers. Additionally, this disorganization did not create any irreversible damage within the organization. This mild incompetency that was evident amongst women in the sample case studies is problematic, as by displaying women as inept, even in a minor way, the idea that they are unfit for workplace management is instilled in readers' minds.

"Phyllis, who was due to present her recommendation to the full top management team in the afternoon, was still not sure which project to recommend" (Project Management – Achieving Competitive Advantage, p. 112). This quotation demonstrated discourse surrounding a moderately incompetent female leader. By procrastinating, Phyllis has made a significant error, resulting in a central problem of the case study. However, she does make somewhat of an effort to fix this mistake, by enlisting the help of her coworkers and putting in extra effort herself to finish her task on time. Discourse regarding moderately incompetent female leaders was vexing throughout this study, as it often times suggested that women were incapable of completing management tasks themselves, as was the case with Phyllis. This is a negative stereotype that becomes perpetuated with such language in education.

"*They bitterly resented her (Kathy's) overbearing style, unwillingness to consult them on key questions, and aloof nature." (Project Management – Achieving Competitive Advantage, p. 137).* In this case, Kathy is described as an extremely incompetent leader. She treats her coworkers in a way that is both miserable and unjust. She is an ineffective leader and shows no effort throughout the case to improve herself as a manager. This kind of discourse is disappointing, as although Kathy has great work ethic and organizational skills, she has no social ability. This kind of language and discourse is harmful, as it suggests that women cannot be both productive and emotionally intelligent, but rather one or the other.

Theme 3: Females as supporting cast members. *"He turned towards Carole, who was now in tears" (Honest Works, p. 187).* This case study included a notable example of a female follower who was described negatively. Carole accidentally creates a problem within the story which becomes central, but is incapable of correcting it. She needs extensive help from her superior, who happens to be male, and when asking for help becomes panicked. Additionally, she shows no emotional stability, as when she realizes her mistake, she begins to cry. This narrative suggests that women need their male superiors to fix their problems and save them. Discourse of this nature is harmful as it suggests that even as followers, women are ineffective and do not belong in positions involving any sort of responsibility or significance.

Disappointingly, for the sake of quantitative representation, there were no cases describing female neutral supporting cast members.

"Andy was impressed with her (Jane's) professionalism, and he was pleased to see that she really seemed to enjoy selling cars" (Sales Management in Canada, p. 278). This case was an excellent instance of positive discourse surrounding female followers. Jane was professional,

hardworking, and showed initiative. Additionally, she was a new member on the salesforce, so to have such great performance early on showed how capable she truly was. Jane was ranked as a positive follower because of all of her capabilities, however, the case in general still used discourse that was somewhat upsetting. The only glaring issue in this case was that although Jane was such a fantastic follower, she was the only woman on the salesforce. The fact that Jane had to go above and beyond expectations to be accepted as the only female employee, fuels the idea that average women are not good enough for the workplace.

Explicit Hypotheses Answers

Hypothesis 1. *Women will be represented in close to 50% of all cases.* Unfortunately, through the analysis of data, this hypothesis was found to be quite ambitious. Only 36 of 100 cases mentioned women at all. This hypothesis was therefore disproved and incorrect.

Hypothesis 2. *Women will be described as followers more often than not, and will be described as neutrally obedient.* This hypothesis also failed, as women were actually described as leaders more than as followers. This is an optimistic finding, as describing women as leaders suggests that there is a place for them in powerful positions. Additionally, women were actually never described in a neutral way. Although there were a small number of cases where women were described positively, overall, female followers were described in an overwhelmingly negative sense. Roughly 70% of female followers were depicted as inept, problematic, or generally bad workers. Therefore, both the quantitative and qualitative assumptions made within this second hypothesis were proven to be untrue.

Hypothesis 3. *Women will be described as leaders less often than not, and will be portrayed as bossy, as opposed to productive.* The third and final hypothesis of this research proved to be interesting as it was both proved and disproved. As previously mentioned, women were actually described as leaders more often than followers. This means that the quantitative portion of this hypothesis was incorrect. However, female leaders who were productive were seen as bossy quite regularly. It was extremely rare to locate female leaders who were both emotionally intelligent and successful. Typically, it was found that female leaders had significant faults, often times resulting in negative twists on typically valued leadership traits – such as the ability to delegate and produce results. Therefore, the qualitative belief of this hypothesis was verified as true.

Explicit Research Questions Answers

Although the research questions have previously been discussed and answered throughout the analysis of this study, it is crucial to explicitly address them here.

Research question 1. *Is there a quantitative gender imbalance in terms of representation in general? To what extent?* Yes, a significant quantitative gender imbalance in terms of representation in general was found. Of the 100 cases examined, only 36 of them even mentioned women.

Research question 2. *Is there a quantitative gender imbalance in terms of representation specifically in leader and follower positions? To what extent?* Yes, a quantitative imbalance in terms of female representation specifically in leader and follower positions was established, but it was not as hypothesized. There were actually less examples of women being described as followers than leaders. Specifically, there were 14 cases which mentioned female followers, with 20 characters included. For women as leaders, 29 cases were discovered.

Research question 3. *What ways in which are women described in leader and follower positions? Are these descriptions positive, neutral, or negative?* In general, as both leaders and followers, descriptions of women within the sample were negative. Although there were 29 cases which included women as leaders, there were 17 examples within such cases wherein they were described as either mildly, moderately, or extremely inept. The results were similarly poor for female followers. Of the 14 cases which mentioned female followers, and the 20 examples of such characters found throughout the textbooks, they were mostly described negatively. In fact, 14 of the 20 female followers within the sample were portrayed poorly, with zero neutral examples, and only 6 positive ones. It was hypothesized that the discourse surrounding these women would generally range from neutral to negative, but the extent to which this unsettling language was used is shocking.

Limitations and Opportunities for Future Research

As with any research, this study had various limitations which are crucial to address, particularly in order to be useful for future researchers. A major limitation to this study came specifically from the gathering of the sample. Randomly selecting only ten cases within each textbook, rather than examining every case, resulted in the sample not being totally representative. One reason why this research is valuable is because most variables were chosen to represent specific populations, rather than broader ones. The decision to study management texts as opposed to business texts in general meant that no information was gathered on varying fields, which can in turn, be interpreted as a limitation. Another limitation came from the fact that only textbooks were studied, as opposed to other learning materials. Finally, focusing solely on the female experience, at least in a qualitative sense, meant that both men and gender variant individuals were not studied. It is important to reiterate that this exclusive selection process yielded niche results, which are valuable in their own way, but for those looking for broader research, such results may not be as useful. These limitations should be seen as opportunities for future research.

Contribution, Implications and Conclusion

Contribution & Implications

In a broad sense, this study is significant in terms of its contribution to the academic world. This research helps close the aforementioned gap in literature regarding the intersection of gender in leadership and gender in education. In general, this study provides extended evidence regarding the exclusion and bias in education surrounding women in leadership positions. This minimal rate

of progression in terms of positive representation for women begs for serious consideration from academics and policy makers alike. Therefore, this study has implications on a wider, global scale as well.

On the broader community, it is hoped that this research will result in radical change, in connecting back with critical discourse analysis and post structuralism. It is recognized that there are many individuals that must approve the content within textbooks, taking on responsibility for what is being distributed throughout society. It is hoped that this study will eventually reach such individuals, and the results found here will inspire radical change within the content of future textbooks. This research could also inspire educational leaders to specifically seek out progressive learning materials. By making curriculum choices that value perspectives from marginalized groups, educational institutions will have the potential to attract more diverse crowds, and in turn, push towards a more inclusive society.

Conclusion

This study has developed results which indicate a significant gender bias regarding female leaders and followers within management textbook case studies. As hypothesized, women were inappropriately represented on both a quantitative and qualitative front. Women were completely excluded from most cases, and when female characters were present, they tended to be described as incapable and insignificant. In some ways, the portrayal of both female leaders and followers as being incompetent and unimportant is uniquely problematic from total exclusion. It involves an active choice on behalf of textbook creators to delegitimize the power of a woman in the workplace. Although this choice may come from a subconsciously biased area, for whatever reason, it was specifically included in such case studies through choice. A radical change amongst societal views of powerful women needs to occur, and education is a possible way to do so. It is hoped that commitments towards such radical change will occur in the future.

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Appendices

Appendix 1: Textbooks

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**FEMINIST CRITICAL HISTORIOGRAPHY: UNDOING HISTORY
A CONCEPTUAL MODEL**

This article explores a new conceptual model called *feminist critical historiography*. The approach fuses *critical discourse analysis* and *antenarrative theme analysis* to aid in the critical study of history from a feminist perspective. The author outlines the approach in detail and concludes with a small case study which illustrates how the method can be employed. Feminist critical historiography demonstrations how a feminist poststructural lens and a collaborative methodology can capture the role of discourses and narratives (macro/micro and institutional/personal) in concealing a more fragmented view of history. The approach openly contests taken for granted accounts and truth statements while also revealing what is hidden from view (and how) in management history, including the lost contributions of female leaders and the gendered and limited scope of the field of management and organizational studies.

Keywords: Feminism, critical historiography, critical discourse analysis, antenarrative theme analysis

Introduction

All methods build out of a paradigmatic tradition. In this article, I explore a new method which is explicitly of service to feminist researchers interested in uncovering female history in the field of management and organizational studies (MOS). My inspiration has been generated by a desire to uncover what (and who) has been overlooked, and challenge that which has been taken for granted and accepted as *truth*.

I begin with a discussion of feminism, which is informed by a poststructural lens. I will continue by outlining my perspective on the study of history (or rather *histories*). These theoretical foundations set up my proposed method which fuses critical discourse analysis and antenarrative theme analysis to ultimately create a new approach, which I am calling feminist critical historiography.

Theory: Feminism and Critical Historiography

Feminism

Talking about power is complicated and power is central to feminism. As feminists, we want power, but power has largely been defined and theorized in masculinist terms. Women are often positioned deferential in relation to men, and roles are defined by malestream ideas (political, cultural, social and ideological). Thus, *she* remains somewhat invisible, or *her* visibility is restricted to stereotypical gendered roles.

It has been argued that feminists need theory, which addresses *power-over*, *power-to* and *power-with* conceptions as well as *foreground* (relations) and *background* perspectives (social conditions) (see Allen, 1999). As such, any analysis must be concerned with "highlighting the constitutive role that power relations play in the formation of subject positions" in addition to how those relations inform culturally encoded meanings and social practices and how institutions reinforce and sustain such meanings (Allen, 1999, p. 131). Therefore, an explanatory framework must have the ability to view power in terms of deep and durable structures that support certain ways of being and modes of femininity.

Alcoff and Potter (1993) suggest that feminist epistemological inquiry demands "a critical analysis of [the] very politics of 'we-saying' that objectivist epistemologies conceal from view" (p. 25). Therefore, feminist theorists need to be aware of the hidden subjectivities which are discursively at work to produce so-called normative (male) knowledge and patriarchal power relations which structure all areas of life (Weedon, 1997).

According to Grant (1993), "there is no one feminist theory" (p.1). Despite early feminism being largely atheoretical and driven politically, the landscape has changed dramatically. Theory has become essential to politics and the sustained effort to change circumstances for women (p. 8). However, it is my view, that critical problems remain before feminist theorists. Including:

1. a romantic gravitation toward *universalism* (one standard for all) and *essentialism* (gender logic system, see Witt, 1995) in theory;
2. navigating the *difference* versus *same* argument spurred from early liberal and radical feminism;
3. locating and sustaining *female agency* in theory development and particularly in the application of methods (see Corrigan and Mills, 2012); and
4. finding the opportunity for both *unity* (common oppression) and *diversity* (unique lived experience, materially and embodied) to exist together while moving beyond a categorical approach to theory building and methodology (see Hill Collins and Bilge, 2016).

Poststructural perspectives hold that language and meaning can be temporarily fixed and culturally and historically contingent, based on specific discourses organized by social power. Language is thus ideological (with political, economic and social implications). Feminist poststructuralism pays close attention to the social, historical, cultural and institutional context of all phenomena to address power relations (Weedon, 1997). Thus meaning-making is relational. There is no *truth*, but rather an opportunity to select between different accounts of subjective reality (Weedon, 1997). My purpose, therefore, in advancing this approach is to uncover the conflicting discourses, which constitute the *rational* and give meaning to the world and our place in it, and then act to transform it. The approach then becomes one, which is necessarily narrow in scope, targeted on destabilizing truths, surfacing alternative voices, and challenging subjectivities in localized contexts (Collinson, 2005).

As Brewis (2005) contends Calás and Smircich (see 1987; 1996a; 1996b; 2006 for example) have made significant contributions to feminist poststructuralism by:

1. uncovering the assumptive bias within organizational theory and the discursive limitations with which it operations;
2. uncovering the attempts by scholarship to make universalistic claims about phenomena, interests and groups and challenging notions of enduring truths about organizations;
3. to make space for non-traditional voices in theory while acknowledging the challenges that come from speaking for others;
4. acknowledging power and how it operates; and
5. creating localized, temporary and subjective accounts of organizations and acknowledging that such attempts are just one interpretation among many.

Continuing in this standard, my proposed approach is an exploration of discourses and narratives which blind history to the remarkable contributions female leaders and their non-traditional voices. Our effort is meant to push the boundaries of what is known, but also how the knowing is constituted. It is a way to explore how language operates powerfully as a device to hide contributions and women.

Critical Historiography

"As management scholars and theorists, we all have a role to play in the seeing, surfacing and telling of untold and overlooked stories" (Williams and Mills, 2018a, p. 282). Specifically, I want to bring to this scholarship a focus on feminine history and feminist telling. Pierson and Prentice (1982) argued early that feminist perspectives alter the historian's task. And because feminism is both a movement and an ideology, it gives rise to theory (Pierson & Prentice, 1982).

Many have argued that *the past* remains undertheorized and that MOS has been "historically ahistorical" (see Srinivas[1], 2012, p. 238). A main critique is that the engagement of history has been instrumental and limited (Srinivas, 2012), prone to "fact collecting" (Kieser, 1994) and atheoretical or theoretically underdeveloped (Foster et al, 2014). I agree with Kieser (1994) and others who have argued for more historical analysis of organizational theory (Williams & Mills, 2018). "History is not so much *the past* as it is a constant reimagining of ideas which remain ontologically adrift (Munslow, 2010), subject to ongoing interpretation, and ready to be adopted into a convenient agenda" (as cited in Williams & Mills, 2018a, p. 287). This agenda can be advanced by any practitioner (positivists and postpositivists alike) to serve a purpose in the present. My process relies on the assumption that history is a narrative approach which selects *traces of the past* (rejecting the existing as factual knowledge of *the past*) (Williams and Mills, 2018a; Foster et al, 2014; Rowlinson, 2004; White, 1984).

Here, I also contest the *fixity* and *scientificity* of history as a single reconciled and perfect narrative that holds value and power over present day theory and practice. "History is rather a messy accounting of many stories. Some of these stories are thrust into the spotlight, centre-stage, while others never enjoy celebrity or recognition" (Williams and Mills, 2018a, p. 282).

It is important to distinguish my approach as a *critical historiographer* operating in a feminist lens with that of an *historian* (from a positivist tradition). I draw a distinction here to allow for readers to negotiate a departure epistemologically and methodologically. To be fair, I do draw from Munslow (2010) who critiques the positivist historian as epistemologically representational, empirical and analytical trying to achieve metaphysical realism. This realism is filled with "negations and repressions" which are

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[1] Srinivas work engages Walter Benjamin's critical theses on the philosophy of history.

influenced politically, ideologically and narratively (Munslow, 2010, p. 24). A positivist historian will collect *facts* in an objective and additive fashion, to build out a linear and logical account of the past. These facts will be selected because they are free of perceived conflict and substantive in the historian's view. He/she/they will evaluate them as being well established and reliable. There is scientific method to the approach, but the limited theory that is applied is one which is focused on an objective recanting of past events and people. This practice is only critical of itself when faced with a conflict between two facts and not critical of the practice of *fact-collecting*, itself.

The positivist historian is producing an authorial accounting and passing it as History (a realistic accounting of the past). In my view, the critical historiography is conversely challenging both the representation of the past and subjects as history and the authors who passes on accounts of merit and worth. My view is that the author, the methods and the subjects of study are all discursive.

Amodern (Durepos, 2015) and postmodern (Munslow, 2010) approaches accept that in studying the past, we are also studying the present. Here I can appreciate Munslow's (2010) characterization of history as *reflexive linguistic representation*. The positivist historian maintains a quest for resolution in both form and content and he or she will not acknowledge their work as cultural translators (Munslow, 2010). I would argue that the very purpose of the critical historiographer is to offer an alternatively plausible accounting, which contrasts with the existing account enough to reveal and hopefully reject the epistemic assumptions and methods of the historian. In my reading of Munslow (2010) the positivist historian believes that the past is knowable, and the critical historiographer understands that it is not. These assumptions are epistemologically rooted and exercised through method.

A Fusion

As a feminist and a critical historiographer, I am interested in finding *traces of the past* and I do not accept these traces as facts. I do selectively choose (as does the positivist historian, by the way) which traces might be relevant, but I do so to show that instead of one perfectly reconciled and linear history, many fragmented, conflicting and incomplete *histories* exist including very plausible alternative histories. I believe that *making history* actually happens in the present and it is a practice which should not only chase *so-called facts*, but examine their context, examine what has been collected, who collected it, and why it was collected and held as important or significant. I recognize and analyze my own subjectivity and role in the practice of making history. I recognize that I have my own agenda (an admission seldom adopted by a positivist historian).

My purpose is three-fold: to disrupt the current practices of the historian, to develop feminist knowledge, and to tell other feminine histories which have been left out of account. These other accounts may be incomplete and involve players that at the time of fact collecting, may not have been viewed as significant (because of gender, politics, race or class or the propensities of the chronicler). Therefore, my approach is much more intentional, context dependent and openly, if not radically, discursive. It is also work that suffers and struggles under the enormous and relentless efforts which are structurally imbedded in existing processes and language and other ideological structures which continue to hide alternative accounts under, behind and in the shadow of *History*.

My aim in engaging history is to offer what I have characterized before as an "unapologetically gendered account" (Williams & Mills, 2018, p. 287). As such, I recognize the danger remains in potentially valourizing one gendered account over another. However, these accounts are meant to challenge the current *sociology of knowledge,* which is already also *gendered knowledge-making*. In so doing, this work can help:

1. reveal some of the absurdity of current practices;

2. reveal some of the ways that the *idea of history* influences the production of knowledge (Durepos & Mills, 2012);
3. argue for the consideration of those overlooked;
4. inform and inspire a better future practice for MOS (and history); and
5. contribute to theorizing a bridge between feminist history and critical historiography

Therefore, my approach necessarily calls for an *undoing of history*. In an undoing of history, I will share a short case study which features Frances Perkins in the context of the New Deal[2] for the purposes of disrupting dominant notions of *reality* and *truth*. A complementary method to this philosophy promotes fragmented, contextualized insights into how we have come to know, what we have come to know (i.e. what has been privileged and why?). As a result, the subjects of any resulting study share focus with the process of theorizing history and feminism itself. Lost female leaders and their stories become the platform for a deeper discussion about the rhetorical, political and ideological strategies which persist in the study of organizations.

Feminists have long argued that historical accounts have neglected women (Hartt et al, 2012; Rowbotham, 1974; Hearn and Parkin, 1983; Scott, 1987). Agency and voice are central to feminist concerns, which are attuned to subjectivity and complexity (Silverman, 2011). Methods must adeptly map discourses which serve to help hide or erase these women, their insights, their experiences and their accomplishments, while simultaneously pulling back the shroud on the sociology of knowledge process to reveal its flaws. Methods must also destabilize persistent explanations and interpretations of personal narratives to reveal their context-specific agendas.

Approach – Critical Discourse Analysis and Antenarrative Theme Analysis

My proposed method blends *critical discourse analysis* with *antenarrative theme narrative analysis*. I suggest using critical discourse analysis to surface key structures of power exhibited through language. I then propose to supplement critical discourse analysis with antenarrative theme analysis to identify more discreet narratives which disrupt and contest more broadly accepted ideas and taken for granted accounts.

Critical Discourse Analysis

Van Dijk (2008a) defines *critical discourse analysis* (CDA) as a type of discourse analysis that primarily focuses on the way social power, abuse, dominance and inequality is enacted, reproduced and resisted. It is important to note that not all discourse analysis is critical and that the critical dimension denotes an engagement with the political (van Dijk, 2008a). CDA uses the analysis of text against a broader socio-political context to recognize social inequality, with the intention of understanding how to resist it (van Dijk, 2008a).

There are several approaches, which comprise CDA[3]. Approaches can also have various levels of analysis, including detailed linguistic/semiosis and more broadly interdiscursive analysis (Fairclough,

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[2] A series of domestic programs in the USA, primarily between 1933 and 1938. The New Deal was the campaign promise of Franklin D. Roosevelt to address the economic and social issues of the Great Depression (see, for example, Hiltzik, 2011).

[3] Phillips and Hardy (2002) offer a framework which features four distinct methods to discourse analysis of which CDA is but one: interpretive structuralism, social linguistic analysis, critical linguistic analysis and critical discourse analysis. These four versions of discourse analysis emphasize either a *constructivist* versus *critical* approach, and a *text* versus *context* approach. CDA's emphasis is *context* and *critical* in approach. Fairclough's (2010) multi-

2010). Others measure these nuances in terms of micro and macro, with *language* representing the *micro* and *social order* representing the *macro* (van Dijk, 2008a). Discoveries through analysis yield insight into strategies of rationalization and legitimization and the durability of discourses through various contexts. My aim is to further understand the relationship between power and discourse (van Dijk, 2008a).

Studies can consist of participation observation, ethnographic methods, experiments etc. to solicit talk or acquire text (van Dijk, 2008a). Here, I prefer to draw on primary, secondary and archival sources to serve as data. I also prefer both the structural and linguistic (rhetorical and pragmatic) kinds of study and both the macro and micro level of analysis.

Some limitations reported with CDA include an argument that it works best in combination with other methods (Fairclough, 2010). Fairclough (2010) also argues that CDA emphasizes the workings of power, instead of the "workings of reception, reaction and resistance to power" (p. 252). An active debate amongst CDA scholars is that CDA can ironically get caught up in the trappings of language and fall prey to paradox with respect to nominalization, which may inadvertently subsume an *agent* semantically into a broader *subject* (e.g. government or police etc.) and thus diminish potential for accountability (see Billig, 2008; Fairclough, 2010; van Dijk, 2008b). It has also been suggested that CDA still represents a rather new approach, but that view is evolving (see Billig, 2008; Phillips & Hardy, 2002; van Dijk, 1994).

Van Dijk (2008a) argues that CDA is so varied that it does not represent a specific direction of research, therefore it does not have a unitary theoretical framework (which may conversely offer flexibility, particularly for feminists). Phillips and Hardy (2002), reframe this argument to suggest that as CDA can sustain many theoretical assumptions and as a result has featured in a diverse scope of empirical studies. Wodak and Meyer (2009) contend that a "constant movement back and forth between theory and empirical data is suggested" to confirm its logic (p. 30). Therefore, it can be argued that CDA is a practical orientation for a research program because of said flexibility.

Though it remains underutilized by feminists (van Dijk, 2008a) it does not conflict with feminist approaches (see Marling, 2010; Phillips & Hardy, 2002). For instance, Lazar (2005) defines *feminist critical discourse analysis* as a method which examines "how power and dominance are discursively produced and/or resisted in a variety of ways through textual representations of gendered social practices" (p. 10). Similarly, feminists often draw on Foucauldian-informed work which "focuses on unmasking the privileges inherent in particular discourses and emphasizes its constraining effects, often leading to studies of how grand or 'mega' discourses shape social reality and constrain actors" e.g., gender (Alvesson & Karreman, 2000 as cited in Phillips & Hardy, 2002, p. 21). To CDA, Foucault brings an emphasis of the concepts of power and domination, the subjugation of sexualized identities, the rejection of truth, the constructivist power of language, and the principle of interrogation (Amigot & Pujal, 2009). However, with CDA the role of female voice and agency remains unclear and as a result I will also rely on antenarrative theme analysis.

Antenarrative Theme Analysis

I believe there are four main critiques of CDA, which can be adequately resolved by the application of *antenarrative theme analysis* (ATA) which I can use to supplement and enhance CDA:
   1.   the potential to overlook female voice and role of female agency in the analysis;

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dimensional framework examines text and context in a dialectical relationship and has the following steps: identify a social wrong; identify obstacles to addressing the social wrong; consider the durability of the social order, which maintains the social wrong; and identify ways to address the obstacles to correct the social wrong. Van Dijk (2008a) argues that the varieties of CDA studies are numerous and cover: grammatical (phonological, syntax, lexical, semantic), pragmatic (speech acts), rhetorical, stylistics, structural, interactional, and multimodal analyses.

2. avoiding nominalization and the subsuming of agents into a broader category, thus reducing accountability;
3. giving insight into the *workings of reception* and not just the *workings of power*; and
4. needing another method to strengthen the analysis.

I believe that a natural link exists between CDA and ATA. ATA looks for what is beyond the taxonomic impeded items, which means it is well suited to address the concern for nominalization and by extension, abstraction. ATA's commitment to both *etic* and *emic* narratives (i.e. outsider and insider), means that there is a potential to have both a polyphony of storytellers, and for both researcher and subject to have voice and agency[4]. Also, such an approach means that the *workings of reception, reaction and resistance* (with respect to power) can be explored. Finally, ATA moves beyond the discourses to include narratives as personal accountings of lived experiences thus enriching the analysis overall. Thus, I contend, CDA and ATA united helps to address inadequacies in both; whereas CDA's emphasis is on discourses as inseparable from the social world, ATA's focus is on narratives as personal accountings, connected, and produced and informed by the social world and discourses.

For a greater understanding of ATA, I draw on Boje (2001) who describes the outcome of this analysis as a more fragmented, less coherent narrative with multiple storytellers who dispute the primacy of the accepted story (record of events i.e. history). As with any analysis, it is a form of sense-making. Boje (2001) sees ATA as a way to explore gaps in other forms of analysis. ATA is consistent with a postpositive tradition and it is more accepting of chaos *in the finding*. Both CDA and ATA are sensitive to historical context and make room for oppositional findings which emerge across time and space (a concept I will highlight in the case study).

Boje (2001) does have critics who feel that *terse stories* or *fragment*s offer relatively little value and conflict with accepted conventions of story-telling (see Gabriel, 2000; Clark, 2001). However, these are fundamentally epistemological differences between the perceived value of narrative (as elaborate) and antenarrative (as terse) stories. Boje uses the term *ante* to denote *before* which speaks to the approach of deconstruction before such *traces* transform from *narrative emplotments* to *mediated coherence* (Clark, 2001). ATA takes stories from the *reconciled* to the *fragmented*, from the *one-voiced* to the *multi-voiced*, and from the *linear* and *reductionist* to the *dynamic* and *disordered*.

In the application here, I am not simply combining the two methods (e.g. see Souto-Manning, 2014 who did so to add a critical element). I am attempting to address gaps and enrich analysis:

- CDA can operate at the macro level structures, where ATA can operate more deeply on the micro level (beyond semiotics) and tease out how such powers limit the personal;
- CDA can further our understanding of the outsider (etic), where ATA can help with the insider (emic) perspectives;
- CDA can focus on the larger discourses, where ATA can focus on the individual narratives; and
- CDA will identify the institutional/public *powers*, whereas ATA can identify the personal/private examples of *resistance* and *complicity*.

Used this way, CDA and ATA help to further disrupt the conformist and conventional coherence that is born of a solitary hegemonic understanding. Coupled with my approach to feminism and history, I am

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[4] It is important to recognize that the search for female voice and agency operates on multiple levels. I am advocating for female voice and agency for my subjects, while simultaneously advocating it for myself as a feminist researcher.

calling this blend of methods: *feminist critical historiography* (see Diagram #1: Theory and Approach – Feminist Critical Historiography)

Diagram #1: Theory and Approach –Feminist Critical Historiography (FCH)
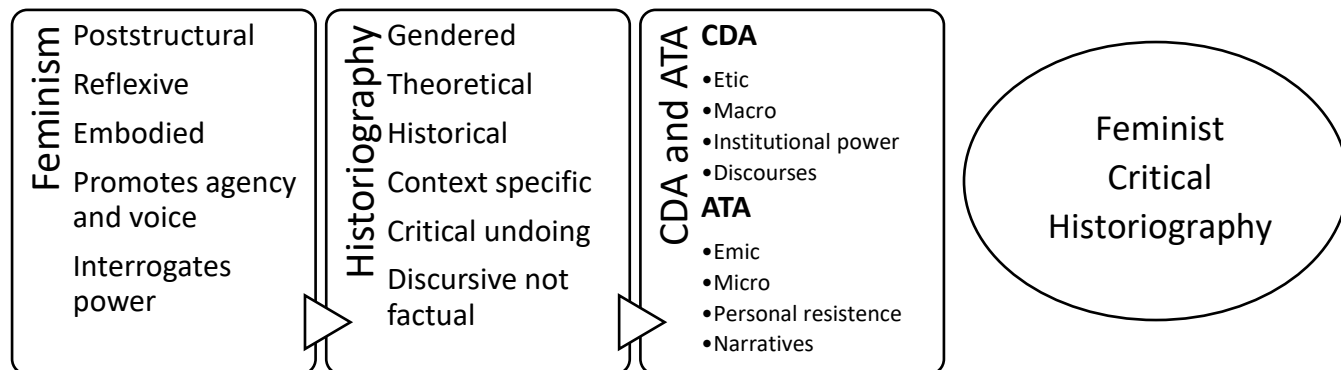
A Short Case Study

For the case study, I have selected Frances Perkins (1880-1965); the first female cabinet minister in the US and serving under Franklin D. Roosevelt (FDR) from 1933 to 1944 as the Secretary of Labor. To draw the link to MOS (for those readers who are new to Perkins), Perkins first worked as a social worker and labour advocate which led to a career in government. During her time in office, she was responsible for designing and implementing social welfare policy which today we take for granted. These measures include: the forty-hour work week, minimum wage, worker's compensation, unemployment insurance, laws banning child labour, unemployment relief, social security and public works – all fundamental labour policy which continues to govern today's workplace (see Williams and Mills, 2017b; Williams and Mills, 2019).

Elsewhere, I have argued that Perkins' work as a proto-management theorist has been overlooked or suppressed (Williams and Mills, 2016; Williams and Mills, 2017b; Williams and Mills, 2018). Operating against Perkins are a set of discourses including gender, social phenomenon such as the *New Deal* and the *settlement ethos* (see Williams and Mills, 2017b) and specific narrative accounts from Perkins and others, which vary widely and change over time[5]. Additionally, I found that Perkins' contributions were largely later credited to male scholars in the developing field of MOS (Williams and Mills, 2017b).

By using feminist critical historiography, I can surface Perkins' own voice and writings (her agency) and destabilize and contest the accepted and limited accounts which currently exist. In most writings, I found that the summation of Perkins' contribution in history was that 'she served as the first female cabinet minister in the US'. We do not learn what she did, who she was, or the barriers she faced.

My approach inspires a deconstruction of these limited accountings and offers up a decidedly different, more fragmented, but no less persuasive account. The result is an analysis which not only shows *what* and *who* has been lost, but also *how*. It is important to note that I do not seek an additive approach in such an analysis, which has been applied by others (see e.g. Graham, 1996). My aim is to challenge not only the selectivity of management theorists in their use of *traces of the past* as *history*, but also to challenge

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[5] How Perkins views herself in 1934 is decidedly different from how she views herself in 1946, which is different still from how others viewed her upon her death in 1965 e.g. see Perkins, 1934; Perkins 1946; Martin, 1976.

the gendered construction of the field itself (Weatherbee, Durepos, Mills and Helms Mills, 2012; Williams and Mills, 2017b).

Using the example of Perkins, feminist critical historiography is concerned with the role of the New Deal as a powerful discourse. The New Deal is both responsible for bringing more women into the government as well as promoting the settlement ethos which focused on the overall care of the worker's health and security (Prieto et al, 2016; Burnier, 2018a, 2008b). The New Deal also invited significant conservative and anti-capitalistic backlash and anti-New Deal rhetoric, some of which targeted many female leaders including Perkins and others, like Hallie Flanagan (see the Dies Committee, as cited in Dossett, 2013; Williams and Mills, 2018). The vision of capitalism that Perkins supported had a human face and was informed by her work as a social worker (Perkins, 1934; Williams and Mills, 2017b). This stands in stark contrast with scientific management which was the dominant approach heralded by the school of management at the time and explains why to some extent, the notions and ideas of Perkins were shut out (as a theorist, and in terms of her contributions to the management and leadership of organizations) (Williams and Mills, 2017b).

Though discourses on a macro level offer some understanding of how history has been shaped, the micro level narratives also reveal a plausible explanation for why Perkins was lost. Many contradictory and fragmented accounts exist about Perkins. A typical historian's approach might be to attempt to reconcile these traces of the past as single, linear narrative (presuming of course that the effort was deemed worthy in the first place). In my investigations I had to look very hard to learn about Perkins. I also noted much concern for *how* Perkins would say things or do things, but not an explicit focus on *what* she said or did. There was even considerable attention paid to what she wore! In fact, I found substantial preoccupation and attention paid to the private life of Perkins, critiquing her as mother and as wife (see Williams and Mills, 2016). This is gender (operating as a mega discourse) informing and influencing smaller narrative accounts. For feminist critical historiographers, it becomes particularly interesting to review these accounts and their diversity (in terms of author context and motivation) in addition to how they shift over time.

The views of Perkins vary considerably and shift from sharp critiques during her time, to more valourized contemporary accounts. An editorial from 1936 in *The Nation* by Paul W. Ward reads "Fannie is not a policy-maker and never has been one. She lacks the imagination. More especially, she lacks the courage" (Keller, 2006, p. 108). Whereas, Jane Addams of Hull House remarks in 1933 upon Perkins' appointment: "perhaps no one in the United States is better equipped for the duties of secretary of labor . . . her appointment would confer distinction and honor upon women throughout the nation" (as cited in Severn, 1976, p. 107). A union perspective from John L. Lewis, president of United Mine Workers of America suggests she is "woozy in the head" while later adjusts his position in the *United Mine Workers Journal* to say that "despite all the criticism that has been hurled against her, she has performed her work within the confines of the limitations imposed upon her mighty well" (as cited in Mohr, 1979, p. 278). Perkins herself simply says that she "came to work for God, FDR and the millions of forgotten, plain, common working men [and women]" (Perkins as cited in Downey, 2009, p. 398). I argue that such humility, in addition to these wildly differing accounts has resulted in her lack of profile and influence in the theoretical development of MOS (Williams and Mills, 2017b). Upon her death, Secretary of Labour W. Willard Wirtz offers:

> Every man and woman in America who works at a living wage, under safe conditions, for reasonable hours or who is protected by unemployment insurance or social security is Frances Perkins' debtor (as cited in Lawson, 1966, p. 153).

As a feminist critical historiographer, my interest is in surfacing the variety of views and emphasizing the conflicts and agendas. When assertions are made of female leaders and their histories without context, and overlooking the social construction of identity, marginalization and often erasure is the result.

By no means is this case study a robust analysis[6], but it offers insight into the effectiveness of a feminist critical historiographic approach. History is complex, multifaceted and conflicting and many remarkable women have been lost to it, or lost by current approaches to the study of organizations. Aided by feminist critical historiography, more notable individuals, their contributions, their barriers to appropriate profile and influence, can be surfaced and examined.

Conclusion

The purpose of this article is to promote a strategy for the active work of history *undoing*. Feminist critical historiography was born of a desire to reveal the value of overlooked and concealed historical figures. My agenda is to challenge the current structures and rules which govern the field of management and organizational studies to see not just who and what has been lost, but discover how it was lost in the first place.

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[6] For more detailed analysis see Williams and Mills, 2017b; and in press.

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ANY GIVEN SUNDAY[1]

Shaun Simoes was a mid-level employee of Hydro One terminated for breach of his employer's zero tolerance policy on discrimination and harassment, and because his off-duty conduct reflected poorly on his employer. However, his termination seemed to be more connected to the furor on social media, or at least as much, as it was to his behaviour. The case and notes consider the ethical and legal issues involved in managing employee misconduct and discipline, the methods and principles used by the courts and arbitrators to resolve a case of alleged misconduct and a possible wrongful dismissal, as well as the use of human resource management practices, such as progressive discipline and due process. Students may find this case especially challenging in that it requires them to balance the ethics of creating a gender-inclusive workplace with the legal rights of the worker in the context of a social media frenzy.

This case is suitable for undergraduate, graduate, and executive education.

Key Words: off-duty conduct, sexual harassment, social media, due process, just cause, discipline, ethics, and proportionality.

Any Given Sunday

On a Sunday in May 2015, Shauna Hunt, a reporter with CityNews, positioned herself to catch fans as they left a match between Toronto FC and Houston Dynamo. As she prepared to interview a pair of fans, a man stepped into her camera's field of view and spewed a foul-mouthed wind-up at the reporter: "F--- her right in the P----." Visibly upset because she had heard the taunt about ten times that day, Hunt decided she would confront the group of young male hecklers. Even though the original antagonist had left the scene, a pair of young men had stayed on to defend their friend. Shaun Simoes, dressed in Toronto FC regalia and clearly a little tipsy, rambled, "It's f---ing awesome. You're lucky there's not a f---ing vibrator in your ear," a reference to the fondness of hecklers to bring sex toys as props.

Hunt was not alone in her experience as strangers had begun shouting at female journalists as they delivered live TV remotes to the point where the acronym "F--- her right in the P----" could be heard almost constantly at sporting and other events. The first incident of the ambush appeared as an internet prank that went viral only a year or two earlier. Copycats, apparently emboldened by prank-based shows like *Jackass* and *Punk'd*, and usually young men, felt emboldened to act out in public. Factor in access to social media and the ability to share online, and it was a recipe for disaster.

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[1] A complete teaching note is available upon request from jim.grant@acadiau.ca

CityNews posted the footage on its website and within hours it had gone viral. Within days, the number of YouTube views had reached millions, but by Tuesday the generalized outrage had become public shaming of Simoes and more personal as several tweeters had identified him by name, as well as his employer, Hydro One, Ontario's provincial power utility. Some demanded the utility take action while others had learned that he was earning a little more than $106,000 as an Assistant Network Management Engineer, according to the Ontario Sunshine List. Reporters began asking Hydro One for comment and Simoes was fired for violating the Code of Conduct only 48 hours after the incident and apparently only after it had been revealed that he was an employee of Hydro One.

Hydro One's public relations strategy was clear early on, to terminate Simoes in order to send a message that it would not tolerate sexual harassment of any kind and to preserve its public image. A company spokesperson, Daffyd Roderick, stated, "Respect for all people is engrained in the code [of conduct] and our values. We are committed to a work environment where discrimination or harassment of any type is met with zero tolerance." Like many employers, Hydro One was feeling increased pressure to promote a harassment-free workplace.

At the time of the controversial termination, thousands weighed in on social media, with many saying that what an employee does on his own time is his own business, invoking arguments like 'free speech' and 'privacy.' Others argued that an employee's behaviour both on and off the job mattered. Moreover, the FHRITP phenomenon had come at a time of increased concern for sexual harassment. After terminating Simoes, the Hydro One CEO, Carmine Marcello, claimed that Simoes "clearly went too far" and that his "behaviour was reprehensible. This was not a grey line." However, Simoes' fate has led to vigorous debate about how much employers should inquire into the social media and personal lives of workers. Employers are beginning to demand that even low-level employees' private communications and behaviour away from the workplace be scrutinized, instead of being concerned only with the misbehavior of more senior employees.

Simoes expressed deep remorse and seemed to have recognized that his conduct was deeply inappropriate. To make amends, before the end of the week he had sent an apology letter to Shauna Hunt, which Hunt described as genuine. The reporter said that she would not release the letter because she considered it personal correspondence but that she "really felt that he meant it." He also donated to the White Ribbon Campaign, a non-profit with the purpose of ending violence against women, and began attending sensitivity training on his own volition and expense. In addition, Simoes had received no previous discipline, nor had there been any reports of inappropriate behaviour toward his co-workers. Moreover, close to three dozen co-workers, male and female, sent letters of support that were overwhelmingly positive.

Instructions to students:

Imagine you are an HR representative at Hydro One and it has become your job to investigate the basis of the dismissal and recommend what action, if any, should be taken.

Consider the following:
1. What factors tend to increase the seriousness of Simoes' conduct?
2. What factors tend to decrease the seriousness of his conduct?
3. Should Simoes have been terminated, or would a lesser penalty have been sufficient?
4. Is it more important to send a clear message to the rest of the company's employees about harassment than to be concerned about Simoes rights? Would an ethical assessment provide a different opinion than a legal analysis?
5. Should employers inquire into the social media and personal lives of workers?

Exhibit A: Relevant Portion of Hydro One Code of Ethics at Time of Simoes' Dismissal

WORK ENVIRONMENT

Health and Safety

Health and safety are the keys to the success of the company and are of paramount importance to Hydro One. Healthy employees working safely are essential to achieving our corporate goals. We are all accountable for health and safety. Fulfilling our individual accountabilities is a vital and fundamental requirement of every employee's job. While management has the responsibility for managing health and safety, all employees must make safety the prime consideration in every decision made and every action taken. All employees will visibly support practices and programs that promote excellence.

Each of us has a personal responsibility to come to work fit for duty, to work safely and to identify, report, and where appropriate, correct workplace hazards. While at work, employees must not be impaired by the use of alcohol, medication, or illicit drugs, shall comply with Hydro One's Safety Rules, and shall not bring or permit anyone else to bring alcohol or any illicit drugs to any Hydro One workplace.

The delivery of products and services in a safe manner is essential to the success of the business. We are committed to minimizing the risk of injury to the public associated with our operations and the provision of services.

Diversity
We value the background, experience, perspective, and talent of each individual. We strive to create a workforce that reflects the diverse populations of the communities in which we operate.

We do not discriminate in hiring and employment practices on grounds prohibited by applicable law, which includes such grounds as race, ancestry, colour, place of origin, sex, ethnic origin, age, marital and family status, physical abilities, sexual orientation, creed, religion, or citizenship.

Harassment

We treat employees and persons with whom we do business with dignity and respect.

We do not tolerate personal harassment, including behaviour that demeans, threatens, or humiliates a person or group of people. We do not tolerate sexual or racial harassment. We do not tolerate comments or conduct that ridicule or disparage a group of employees, even if not directed at a particular employee.

We do not tolerate any behaviours that may promote violence in the

workplace. Workplace violence often begins with harassment. We have a duty to take preventive action by bringing forward information relating to emerging situations in the workplace that may result in violence.

Work Performance

As employees, we are accountable for our work and for our results, and are committed to giving our full effort in everything we do. We expect to be evaluated by such standards as quality, quantity, timeliness, and whether the work has been completed safely and within the limits of allocated resources.

We recognize that we must continue to seek new ways to be more effective and efficient. We expect our supervisors to follow leadership practices that promote an environment where high performance is encouraged. We expect our supervisors to set clear expectations and to provide appropriate support and timely feedback. We expect a work environment in which suggestions for improvement are welcomed and implemented where appropriate.

Developing our Potential

As a company, we recognize that the capability and commitment of our people is our most valuable asset and is critical to our business success. Supervisors are expected to treat employees in a manner that encourages commitment and high performance. At the same time, supervisors are held accountable for maintaining and enhancing the capability of their unit. Although each of us is responsible for our own career planning and development, we understand that the company will support our active pursuit of a jointly agreed and supported development plan. As a result, we can expect to increase our personal contribution and value, as well as our collective capability within the company.

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