DOING DISABILITY AT THE BANK:
2006 PROJECT 'SNAPSHOT'

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INTRODUCTION

Social science researchers know very little about people with disabilities as learners in mainstream workplaces, and particularly in corporate environments. Indeed, because they are often portrayed as passive, and not engaged in growth or change, disabled people are seldom considered as learners at all – and certainly not as informal learners initiating and taking charge of what and how they want to learn. Over the past four years, our research has addressed this oversight.

This short paper is a "snapshot" of the study titled "Doing Disability at the Bank: Discovering the Learning/Teaching Strategies used by Disabled Bank Employees." Briefly, it does two things. First, it "unpacks" a four-year partnership between a university and a major financial institution in the implementation of the Bank Study. Second, it describes the research team's analysis of seven focus groups that we conducted as the primary focus of that four year partnership.

LEARNING THE RULES OF ENGAGEMENT:
TEXTUAL PRACTICES OF POWER IN A UNIVERSITY-CORPORATE RESEARCH PARTNERSHIP

The "players" most directly in contact with each other in the implementation of this study are researchers from a relatively fledgling undergraduate program in the also fledgling inter-discipline called Disability

Studies, and senior managers from Human Resources in the corporation's national office. (If David and Goliath come to mind, you are not far off.) Both partners have explicit though different investments in disability. In this instance, we collaborated around a mutual interest in the learning/teaching strategies used by disabled employees to stay viable within a corporate environment.

In this section, I review a couple of major discoveries that we made while "researching up" with elite groups rather than "down" with the marginalized groups that are our more natural allies. I will then discuss the impact of these discoveries on the analysis and writing of our research results. In both instances, I draw in general terms on notions of the relations of ruling as advanced by Dorothy Smith, and as demonstrated by her and other practitioners of institutional ethnography. My specific attention is to Smith's work around textual mediated relations. I have also drawn from Susan Turner's study of texts, municipal government and the public process of land development, even as she drew on Dorothy Smith's original framing of the relations of ruling. I build on their work as I attempt to hone in on the relations of discourse as part of how ruling occurs. Specifically, I am concerned with the "actual forms of words, language, speech and writing that co-ordinate consciousness and project organization into what can come next" (Turner, 2002: 3)

<u>Moments of Contestation</u>

Looking back, I can identify two "moments" of significant tension in the working through of "Doing Disability at the Bank." The first occurred in the early day of the study (days of "shock and awe") when I was naïve about the "rules" of corporate engagement. The second occurred during a period of learning through direct corporate contact and textual "correction." I do not exclude emotional tension from this scenario: anger, frustration and despair come to mind. But the moments I am referring to are those in which the research

team and the corporation were clearly at odds with each other in their intentions for the study. I have identified and analyzed these moments empirically by referring back to particular texts that were the focus of contestation and negotiation between the partners. [1]

Setting the Terms

The first moment of contestation occurred because of the corporation's insistence on a legally binding partnership agreement. From behind the scenes, the lawyers who negotiated this agreement sought to protect the bank's brand and its associated reputation. Their major demand, conveyed through the manager assigned to our "file," was that I specify "under what circumstance the Bank will be referenced in study reports, documents and your process to ensure we approve any reference to the Bank and our employees." In responding to this request, I turned to the university's Publications Policy from which I lifted as strong a statement on academic freedom as I could find. My primary concern was to preserve adequate space for critical enquiry and publication. I turned also to the Ethical Review Protocol that the university approved for this study. From it, I lifted provisions on confidentiality and anonymity – for participants and, under certain circumstances, for the corporation itself – as well as the destruction of raw data after five years. [2]

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[1] There are, in fact, nine documentary "turns" in the textual sequencing of this study so far. They constitute what Turner called an "extended inter-textual exchange." For more details, readers are directed to our paper from the 2005 Wall conference called "Steppin' to the Rhythm of Circumstance" (Church and Luciani).

[2] The protocol itself presented significant problems. The guidelines were heavily structured by the assumptions of positivist science, and thus it was tricky to preserve in the writing my orientation both to open-ended discovery and to radical disability politics. The questions wanted me to begin in the literature rather than in the experience of disabled people. They wanted me to begin from a hypothesis and to either prove or disprove it on a statistical basis. They wanted me to know the subjects of my research by category (gender, age, race, perhaps body part or body/mind…). They wanted me to sample these categories and in sufficient numbers that I could generalize my findings with (statistical) confidence. With their explicit concern for "special populations" they evoked a vision of disabled people as vulnerable subjects who are (only) the potential victims of top-down intervention.

The Ethical Review Protocol thus became the base document that, to review Susan Turner's words "co-ordinate(ed) consciousness and project(ed) organization" into the Letter of Agreement – the document that "came next." The provisions that I drew from the Protocol were first in a sequence of exchanges that enabled the Bank's textual practices. The Bank's pattern was to accept the words and phrases that were offered but to further specify, qualify and quantify.[3] Because I was engaged with the Ethics Protocol and the Letter of Agreement at the same time, I was struck by their similarity: the university's attempts to shape the research by making it answerable to a particular definition of ethics, and the Bank's attempts to ensure that the research served corporate interests. Universities and banks may deal with different products but they are using some of the same textual practices of management and control. I continue to probe the extent to which they operate coordinately as a kind of inter-institutional regime of control.

Absorbing Correction

The second moment of contestation occurred as we engaged our corporate partner around the initial written product emerging from the study. A good example here is the first "Discovery Document," a fifty page text that we submitted to them in 2004. After a thorough reading, our manager cautioned against what she perceived as an undercurrent of negativity or critique that she picked up in our writing. For example:

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[3] So, for example they included the paragraph on academic freedom once I qualified it. They could read draft publications; dissenting opinions on their part would be noted in the text; and if they were still uncomfortable, I would remove any reference to the Bank from the text. The traditional confidentiality assurance was transformed by the stipulation that "employee information will only be made available to members of the project research team in accordance with the principles of law, specifically the Personal Information Protection and Electronic Documents Act." This, it turns out, is a piece of legislation (2002) affecting corporate practice in Canada.

> For the most part, the people we talked to are highly supportive of
> the bank and <u>its attempts</u> (our emphasis) to create more inclusive
> environments.

Our manager pointed out that the word "attempts" conveyed a struggle with disability that was at odds with the corporation's need to portray an already-accomplished competency. She directed us towards more "fairness" and "balance" in our portrait. In no way was the bank to appear as "a bad guy." The instruction was to document bank accomplishments with respect to disability as well as where it needs to do more work. We were to concentrate on "facts" as opposed to analysis or interpretation, and on recommendations for improvement – without suggesting, of course, that there is anything that needs improving in the first place.

The other good example has to do with the research team's attempts to produce a newsletter for study participants. The process turned out to be both laborious – three versions worth -- and unsuccessful. Our corporate reviewers extracted any reference to researcher presence, description of place, and descriptions of the environment – in fact, nothing that we deemed important matched their frame of reference. Here again, corporate textual practices mirrored conventional academic textual practices.

> Knowledge is constituted as "focused" problem (hypothesis)
> centered and "linear" straightforward. Other thoughts are
> extraneous. Inductively accomplished research is to be reported
> deductively; the argument is to be abstracted in 150 words or less;
> and researchers are to identify explicitly with a theoretical label.
> (Richardson, 2000: 927)

We knew enough to avoid discussing study findings but even so we faced the same kinds of corrections as we did with our first discovery document. At

one point, for example, our HR contact made the following changes to the draft text.

> The purpose of this study is to explore the work-learning relations that shape and are shaped by disabled employees <u>to ensure their success</u> (our emphasis) in the financial sector.

A subtle, yet powerful inclusion of words that (re)position the disabled employees we interviewed as exemplars: disabled employees who are successful, not those who are just scraping by.

A Moment of Anticipation

As the research team probed the learning strategies of disabled corporate employees, we were simultaneously engaged in a process of learning (actively being taught) the "proper" ways to engage with our corporate partner. Writing elsewhere (see Billett, Fenwick et al, in press) I have described the subjective intimacy with which this was accomplished through direct contact and interaction with human resources managers over time. Corporate control of the project was established not through outright demonstrations of power but subtly -- through rules of etiquette and procedure. [4] And it was done, as I have described here, in documents through writing. The partnership agreement set a particular frame for our work as academics – one with which we were only partly comfortable. Feedback on early documents established a demand for "fairness" and "balance" in our comments; this made us wary of using writing practices that are established currency in academia.

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[4] I have observed and analyzed this process before in my study of psychiatric survivor participation in policy-related consultations. Here government bureaucrats attempted to take the "highground" by reinforcing a particular code of conduct: "Don't give offense. Don't be unpleasant or adversarial. Don't complain or fight. Be nice. Be reasonable. Be considerate and cooperative." Professionals precluded the personal and emotional from their presentations; psychiatric survivors did not. This was the deepest ground of their contestation. It was an instance of a dominant group teaching a subordinate its politeness code which entailed subliminating anger into non-political modes of expression. This is governance.

Again, I would turn to an actual document, this time to show how this particular partner relation has influenced the shape/style of texts emerging from the study. I am referring to the research team's second and final "discovery document," only recently submitted for feedback. The writing strategy that I used to produce this 100 page work was to embed analysis within the actual structure of the document – a critical framework or skeleton, if you will. The arguments that we are evolving from multiple transcript readings are evident in the selection and sequencing of material but not (yet) in direct commentary or argument.

Having placed the researchers in the background, I then used participant voices to establish a critique. Working from 250 pages of transcripts, I created a series of participant dialogues by stitching together segments of conversation to reveal the major positions debated among and between focus group members. In some instances, I have consolidated similar conversations across groups. I have titled the dialogues using participants' words that are particularly salient and expressive. Beyond this and cleaning up the "talk" so that it is easier to read, I have made no major alterations in the content. The analysis that the speakers make is their own. What I have delivered to our corporate readers, then, are pieces of actual group conversations from inside the bank. Thus, the debate for national managers is not with us – a situation in which we are sure to "lose" -- but with their own people -- insiders to the same organization.

At the moment, access to the second "discovery document" is limited to key individuals/groups within the corporation selected for their expertise in understanding its implications for the organization and in positioning it for maximum impact (or damage control). As we work towards a version that can be more broadly shared, the text is situated as a Draft Final Report. We are

prepared to revise and resituate it in response to reader feedback and advice. Specifically, I look forward to adding a section on Researcher Commentary as well as a section called "Implications for the Corporation." Because I will derive them from feedback and discussion of the current draft, they are currently unfinished.

RECOGNIZING THE INVISIBLE WORK OF
DOING CORPORATE DISABILITY

From 2003-2005, with the collaboration of corporate managers, the research team ran seven focus groups in three geographic areas: eastern, western and central Canada. Each location included one group specifically for employees who identified as "disabled" and another with co-workers and/or manager "others." In other words, we asked participants to self-select into one of these two categories. The invitation was sent out through existing electronic channels as part of a communication strategy, jointly designed, but implemented by corporate national office. Group formation was further facilitated by local managers at each site. By the end of this process, we had conversed with 70-75 bank employees: from call centre workers to branch workers to professional bankers. This cross-country check-up oriented us to a range of people, places and experiences, as well as to the bank's organizational variation. In this way, we met employees who are wheelchair users as well as people with varying degrees of visual and hearing impairment – and combinations thereof. We also met people living with invisible disabilities such as irritable bowel syndrome and chronic fatigue, to name just two. People with other kinds of struggles (e.g. depression, Crohn's Syndrome) were drawn into the conversation through stories shared by the participants with whom we conversed.

What is Disability? Learning from Group Formation

Participants in all groups perceived the potential scope and complexity of the topic. This was particularly strong in the co-worker groups where members quickly discovered that the definition of disability is slippery, and that, in fact, they did not actually know what it was. They recognized that they might not have the language to say what they wanted to say, or, more specifically, to speak "correctly" in a terrain loaded with potential rhetorical errors. One group teased out the ways in which "disability" was not just a bodily experience but also an organizational construct with distinct purposes within and for the corporation.

There was a tendency for co-worker participants to begin speaking in a way that drew a clear line between "normals" and "disabled." As the conversation developed, this line became blurred as people made empathic connections to their own bodily struggles, and to situations affecting their family and friends. The clearest examples came from women who drew on experiences of pregnancy, maternity leave and caring for children. Two interesting observations emerged: first, that the "perfect body/life" for an employee these days is one that is also "lean and mean" in terms of lifestyle and a single-minded commitment to the job; and, second, that the corporation's commitment to a diverse workforce is in steady tension with its drive for revenue/profit.

To Tell or Not to Tell? Debates about Disclosure

There was a debate between disabled employees and their co-workers/managers over whether disability should be openly disclosed in the workplace. Participants who identified as disabled arrived with different histories of decision-making about whether or not to publicly identify. Some had physical differences that were readily obvious, and/or used some kind of aide (e.g. a working dog) and/or carried a symbol that marked them as disabled (e.g.

a white cane). As they had no option but to disclose, these employees tended to be strong advocates for openness from other people and were keen on education for their co-workers. Other participants lived with invisible conditions or differences that were only partially or situationally visible, and consequently had options around disclosure. For them, being open about bodily difference and its implications was not necessarily wise or advantageous. They sensed the potential to be "branded" as a potential "question mark" in relation to both employers and customers.

To the extent that it is possible, then, disabled employees prefer to establish some level of workplace comfort by staying hidden. Concealing some fundamental aspect of self/body is a form of work that has to be learned, a second "job" layered onto the one for which they are officially paid. Generated through trial and error, disabled employees who participated in this study shared a submerged knowledge about how to do this. Two strategies were particularly interesting: first, the creation of virtual, able-bodied identities enabled by the privacy of telephone/email communication; and second, the subtle, interactive work of building networks of collegial support in the workplace. This knowledge is not part of the corporation's training but is vital to its disabled employees' success.

By contrast, disclosure was the preferred practice from the co-worker perspective. Co-workers and particularly managers felt that they need information in order to do a good job running a team or completing a project. However, these participants were somewhat torn over whether there should be a general rule requiring that people disclose their disabilities, or whether that knowledge should emerge out of individual decision making in the context of a particular relationship between an employee and a manage. In either case, co-workers felt that having information was the only way that they could begin to be helpful around problems of performance and production. They felt awkward probing for information that they were not directly given, wondering how to do

that without offending a disabled co-worker or breaching his/her right to privacy. At the same time, there was a broad understanding that bodily difference can have a negative impact on a person's prospect for retention. Most co-worker participants knew people who did not disclose illness or disability. They understood that disclosure could be detrimental in the instance where an employer is "getting rid of the weaker performers."

Learning as 'Work:' Four Practices that Count

The first finding of this study is that participants considered themselves fortunate in their employment in this environment. For some disabled participants, it is their only experience of permanent work and/or a job outside the context of government-sponsored programs. Proceeding from this finding, we probe the question: "what constitutes learning for disabled employees in corporate environments?" We pursue it through four primary activities that position the informal learning of disabled employees as an ongoing, complex but also invisible form of work.

Keeping Up: Co-Workers Explain

Financial institutions are fast-paced, high pressure, high-demand environments. Participants used words such as "intensity" or "driven" to describe the press to high performance, productivity, effectiveness and efficiency. Located at the heart of the bank's corporate philosophy, these words are made real in highly tangible ways through processes of quantification: counting, measuring timing, and taping for quality control. Co-workers/managers explained in detail how this worked. The sharpest point of the discussion was the identification of a major tension between the primary business of the bank – its revenue-generating bottom-line -- and the introduction

of a social agenda around diversity. How, participants speculated, are these conflicting goals to be satisfactorily met? Having a disabled employee on your team slows things down and reduces productivity. This message had the status of unquestioned fact in the co-worker/manager groups where the big issue was the logistical, performance and/or social limitations/problems that disability poses for "regular" workers and teams.

Waiting: Disabled Employees Talk Back

Disabled employees had some "come-back" arguments beginning with the ways that they compensate for working differently than the "norm." Ingenious workload management and high quality product are two ways that disabled employees do their own keeping up in the midst of a fast-paced, demanding and competitive environment. As well, they are just as ready as their able-bodied coworkers to deliver a standard productivity. However, this readiness is sometimes frustrated by struggles over accommodations – often adaptive software and equipment -- that would improve their job performance. In other words, disabled employees countered co-worker/manager concerns about their ability to "keep up the pace" with their own concerns about waiting for infra-structural support. This reframing shifts the location of the "problem" of disability from its conventional location within the bodies of people with disabilities ("too slow") to larger, organizational practices and procedures (also, "too slow"). Waiting is practiced on both sides of the fence -- not just one – and that is an important discovery.

Making Claims

Like their co-workers, disabled employers are always engaged in learning new skills. Invisibly and informally, they also teach. Specifically, they teach their

co-workers about the lived experience of disability: person by person, moment to moment, encounter by encounter, day by day. In the process they are confronted with the reality that most of their co-workers are not well-informed; many do not know how to or are too uncomfortable to ask a person about their situation. To complicate matters, this study also reveals – perhaps for the first time -- that co-workers tend not to remember what they are told about how to interact with a disabled colleague. Persistent co-worker "forgetting" throws disabled employees into repeatedly conveying the same information so that they are always "breaking co-workers in."

This experience can be countered, to some degree, by the work of a good manager. Participants in our "disabled groups" had been exposed to different management styles and degrees of quality. Their experiences ranged from struggle and misunderstanding to pleasure and admiration. There were two indicators for managerial success: one was personal experience of disability through family or community connections; and the other was direct contact and sustained interaction with disabled employees. For their part, managers struggle to find the enlightened stance to take in situations fraught with conflicting interests. Their efforts are giving rise to small solutions, such as better planning and training, as well as promising directions – including ways to "loosen the sides of the box" that binds managers and employees alike to the existing pace of production.

Keeping it Light

The ability to "keep it light" is one of the qualities that disabled employees emphasize as a key to success in a corporate environment. The most direct demonstration of this was learning to laugh openly at yourself in order to ease the discomfort of others. Disabled employees described using humor to cope with situations arising in the workplace, as a means to teach their co-workers

and as a way to ease relations with family and friends. The social (and sometimes political) function of humour lies with its capacity to create receptivity for physical and emotional difference. It enables them to ensure their rights and meet their needs without causing discomfort to others through confrontation or aggression – a stance necessary for organizational life. The underlying politics here is one of personal responsibility such that disabled employees will hesitate to press for workplace accommodations. So, while there is recognition that the continual intensification of production is difficult to handle, many disabled employees refuse "special treatment." When humour is combined with a high degree of individual responsibility, you end up with disabled employees who make working in corporate environments look fairly easy. Or, perhaps more to the point, the people who learn how to make things look easy are the ones who end up staying.

CONCLUSION

Clearly, much has been gained from this rare study of learning by disabled employees in a corporate environment. Yet, many questions remain as "Doing Disability at the Bank" nears completion. Not the least of these is whether this project will successfully publish the rich material produced through this study. Having survived tough negotiations around a partnership agreement, and an ongoing process of correction to the way we do our work, the research team has entered into more informed engagement with a corporate partner – something that could be characterized as a "political sidestep." [5] Clearly a compromise, this approach openly acknowledges our "one-down" position in an inequitable relation. It necessitates experimentation with and mastery of new textual practices. Thus, our current strategy is to produce "Trojan texts" that can become the focus of discussion and debate within the corporate national office.

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[5] Acknowledgement to Timothy Diamond.

These documents keep alive the possibility of breaching corporate walls to better understand the lives and learning of people with disabilities in these settings. [6]

CITATIONS

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