Chapter 5
Disentangling the Complexities of Queer Theory and Intersectionality Theory: Research Paradigms and Insights for Social Justice

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Abstract Queer theory and intersectionality theory have emerged as prominent paradigms guiding decisions for research design and methodology in educational research. Despite their increasing prominence and implementation in educational research, applying these paradigms can result in confusion and conflation without understanding their unique distinctions. Additionally, queer theory and intersectionality theory each carry their own legacies, predecessors, and philosophical underpinnings. Queer theory primarily focuses on disrupting the restrictions associated with binaries and identity categories, whereas intersectionality theory involves an examination of social identities (e.g., race, sexuality, gender identity) and intersections to understand power relations and inequities. With an overarching introduction to queer theory and intersectionality theory as two distinct paradigms, this chapter involves the following goals: (a) explain key aspects of queer theory and intersectionality theory as distinct paradigms; (b) identify differences between queer theory and intersectionality theory; and (c) provide recommendations for understanding paradigmatic differences in research.

Queer theory is a paradigm of research focused on the diverse experiences of sexuality, gender identity, and affection; rejecting binaries in identity categories; and using experiences of historically marginalized communities to examine injustices

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and barriers (Lugg & Murphy, 2014). In contrast, intersectionality theory is a paradigm of research focused on inequities occurring within interpersonal experiences and systems (e.g., workplace, school, community), connections between social identities (e.g., race, ethnicity, sexuality, gender identity), an understanding of which identities and environments produce power, and an agenda toward social justice by identifying points to implement change (Collins & Bilge, 2016). Using a paradigm of research (e.g., queer theory) involves a preliminary understanding of the history, contributors, and philosophical underpinnings. A paradigm of research, hence, relates to the researchers' personal philosophy and values; fit between research purpose and design; and connection across the entire process of the study (e.g., initial research question formation, tools for data collection, the process of data analysis, writing the report, determination of findings). The paradigm outlining a research study is an approach emerging from theoretical underpinnings to guide the research purpose, decisions for methodology, the lens for data analysis, and the use of the findings.

Queer theory and intersectionality theory are important in their attention to barriers and inequities affecting historically marginalized communities (e.g., LGBTQ+ communities, people of color) by recognizing their identities (Guba & Lincoln, 1994; Kincheloe, McLaren, Steinberg, & Monzó, 2017). For this reason, educational research continues to build upon the work of queer theorists and intersectional theorists while making current contributions. Scholars implementing queer theory or intersectionality theory as paradigms in their research studies can carefully consider how research impacts the communities of interest and mobilizing participants and researchers to institute change in the face of their respective communities. Although some research in education addresses these issues, the majority of educational research still relies on using data accessible to researchers as truth rather than questioning the possibilities giving rise to such data (Detamore, 2010; Patel, 2016; Tuck & Wang, 2018). With a majority of research using empirical evidence to inform their practices, researchers, scholars, and practitioners can exclude historically marginalized communities and pose barriers to scholars attempting to produce change, action, and experiences in the lens of queer theory or intersectionality theory.

Paradigms specifically require an understanding of distinction. For example, queer theory and intersectionality theory result in their own unique underlying principles and tenets to align the purposes and offerings for a research study on social justice (Bilge, 2013; Chan, Erby, & Ford, 2017; Collins, 2015; Cor & Chan, 2017; Hancock, 2016). Nonetheless, scholars and researchers continue to grapple with the conceptualization of the parallels between these theoretical frameworks while elucidating its distinctions to increase accessibility for research methods closely involved in social justice and equity efforts (Duong, 2012; Fotopoulou, 2012). While unifying conceptual and empirical literature to more fluidly interpret queer theory and intersectionality theory, this chapter delves into the following goals: (a) explain key aspects of queer theory and intersectionality theory distinctly; (b) illustrate differences between each paradigm as its own distinct framework; and (c) generate recommendations for use in research.

Distinguishing Between Queer Theory and Intersectionality Theory

Queer theory and intersectionality theory have produced conceptual frameworks and empirical analyses wrestling with the nature of identity categories, organizations of power, historicization, and social location. Due to their critical roots, some areas within their approaches may seem similar. Their approaches and purposes, however, are vastly different as a result of their legacy and theoretical underpinnings.

Queer Theory

Queer theory emerged from a long-standing history as a method to reject identity categories, even with LGBTQ+ communities naming their identities to hold to power (Jagose, 2009; Lugg, 2003; Lugg & Murphy, 2014). Distinctly, queer theory as an analytic framework operates as a poststructuralist approach to disrupt binaries (e.g., cisgender-transgender; gay-heterosexual; male-female) to ultimately question the power instituted by categories (Few-Demo, 2014; Few-Demo, Humble, Curran, & Lloyd, 2016; Fish & Russell, 2018; Mayo, 2017). As a result, its theoretical roots have evolved from the work of several scholars attempting to push the boundaries on sexuality and gender, including Foucault (1980), Rubin (1984, 2011), Butler (1990, 2004), and Sedgwick (1990, 1993). More distinctly, predecessors contributing to the development of queer theory essentially reject identity categories as elements tied to power while noting the cultural, political, historical, and contextual tensions influencing the construction of identity categories (Ahmed, 2006; Butler, 1990, 2004). Thus, the queer theory approach defines queer as a verb as much as a noun, considering the complicated, messy, and political nature of identities in association with the interruption of binaries (McCann, 2016; Misgav, 2016).

As queer theory continues to emerge in scholarly research focused on equity and social justice, the approach notably operates from a generated set of underlying principles core to the heart of its complexity and deconstruction of power and identity (Love, 2017; Lugg & Murphy, 2014). Queer theory is distinct in its approach to be disruptive of identity categories, realities highlighted by the construction of identities, and structures and power relations governed by classifications and identity categories (Goodrich, Luke, & Smith, 2016; Lugg & Murphy, 2014; Rumens, 2016, 2017; Jagose, 2009). For this reason, queer theory analyzes several systemic components, including history and context, to critically examine manifestations of power determined by binaries and identity categories (Gedro & Mizzi, 2014; McCann, 2016).

Other than exclusively problematizing social structures, queer theory focuses on reorienting visibility of marginalized communities through giving voice to unique and complex forms of agency, representation, and identity (Adams & Holman

Jones, 2011; Love, 2017). Given its antiessentialist platform (Lugg, 2003; Lugg & Murphy, 2014) as a defined approach to consider unique, individualized, and authentic experiences divergent across communities (e.g., LGBTQ+ communities), queer theory enacts an empowerment to reify and author narratives unique to the variability by noting fluidity, complexity, and intersections with other social identities (e.g., race, ethnicity; Rumens, 2013, 2017; Lugg & Murphy, 2014). Hence, queer theory takes on the *antiessentialist* value of realizing that not all experiences will represent the same identity or identities, especially as intersections with other dimensions of social identity accentuate divergence (Few-Demo et al., 2016). Thus, rejecting categories and binaries is the crux of the poststructuralist approach by realizing many interpretations and experiences can coexist outside of claimed identities. Tied together with fluidity, refuting binaries is a core component of queer theory approaches through substantiating the connection between binary identity categories as a function for substantiating power (Rumens, 2013).

Intersectionality Theory

Intersectionality theory was born out of collective movements angled toward social action, equity, equality, and human rights, particularly for communities experiencing multiple forms of marginalization (Chan et al., 2017; Cor & Chan, 2017). With implications for scholarly and educational practices, intersectionality emerged from decades of dialogues centered on protections and rights for women of color while resisting restrictions and disenfranchisement from feminist movements (Carbado, Crenshaw, Mays, & Tomlinson, 2013; Cole, 2008, 2009; Grzanka, Santos, & Moradi, 2017; Parent, DeBlaere, & Moradi, 2013). Intersectionality also rose to prominence specifically through the work of Crenshaw (1988, 1989, 1991) as a legal analytic framework to question the protections held by antidiscrimination law. Distinctly, Crenshaw critiqued legal scholarship for examining through the lens of a single axis (e.g., exclusively race; exclusively gender) the possibility that a Black woman would still face inequities. Although intersectionality has been tied closely to the work of Crenshaw (1988, 1989, 1991) and Collins (1986, 1990, 2004), feminist and intersectional scholars trace the history and genealogy of intersectionality to multiple women of color and queer women of color using personal narratives of multiple marginalizations as the basis for collective action (Anzaldúa, 1987; Combahee River Collective, 1977/1995; hooks, 1981, 1984, 1989; Lorde, 1984; Moraga & Anzaldúa, 1983). Attuned to the gravity of their personal experiences with marginalization, predecessors of intersectionality cited the problematic erasure of women of color in feminist movements (Collins, 1986; Crenshaw, 1989, 1991) while subversively interrupting the boundaries on choosing single categories of identity to convey their existence (Anzaldúa, 1987; Lorde, 1984; Moraga & Anzaldúa, 1983). Hence, the evolution of intersectionality carries prominent roots in feminism and, more distinctly, Black feminism (Bilge, 2013; Carbado et al., 2013; Cho, 2013; Cho, Crenshaw, & McCall, 2013).

Notably, intersectionality considers the unique lived experiences inherent in multiple dimensions of social identity (e.g., race, ethnicity, gender identity, sexuality, affection, size, regional identity, spirituality, ability status, generational status, social class) through realizing diversity as a factor within and between identity categories (Bowleg, 2008, 2012; Chan, 2017; Chan et al., 2017, 2018; Cole, 2008, 2009; Corlett & Mavin, 2014; McCall, 2005). Intersectionality institutes an approach dedicated to the experiences of multiply-marginalized individuals and communities rendered invisible by social structures (e.g., environments, communities, policies, advocacy, and human rights movements; Bilge, 2013; Bowleg, 2013; Carastathis, 2016; Cor & Chan, 2017; Crenshaw, 1989, 1991). Intersectional approaches also realize the phenomenon of carrying both privilege and oppression simultaneously (Smooth, 2013) as an outcome of complexities and linkages among social identities (Collins & Bilge, 2016). This particular principle accentuates the complex, unique realities illustrated through multiple overlapping forms of oppression (Cho, 2013; Shields, 2008; Warner, Settles, & Shields, 2016). Connecting immensely with social identities, intersectionality operates with the assumption that social identities are not necessarily mutually exclusive entities, but rather, linkages serve as the analytical lens for understanding inequities and opportunities for social justice (Carastathis, 2016; Corlett & Mavin, 2014; Gopaldas, 2013). Analyses formed with a lens of intersectionality continue to examine how such linkages remain connected to political, contextual, and historical forces sustaining roots of subordination and stratification of power (i.e., specific communities having privilege and power over other groups; Bowleg, 2012; Bowleg & Bauer, 2016; Love, 2017; Smooth, 2013).

The promise of intersectionality, however, does not exclusively rely on a conceptualization of multiple identities (Moradi & Grzanka, 2017). Intersectionality, in particular, does not exist without an interrogation of power and the structures that sustain inequities (Bowleg, 2017; Bowleg & Bauer, 2016; Collins & Bilge, 2016). Consequently, intersectionality critically analyzes the personal experiences of marginalization to reflect relationships with social structures and levels of power responsible for the historical reproduction of subordination (Collins, 1986, 2004). The philosophy of intersectionality is interrogative in this manner to problematize inequitable systems of power, but more so to reform systems for the liberation of multiply-marginalized communities (Chan, 2017; Chan et al., 2017; Cho et al., 2013). Thus, approaches grounded in intersectionality amplify possibilities and sites of change to enact a social justice agenda and to determine systemic change (Collins & Bilge, 2016; Corlett & Mavin, 2014).

Applications for Educational Research on Social Justice and Equity

With the explication of both intersectionality and queer theory as their own distinct paradigms, it is ostensibly important for researchers to understand the distinctions between the two paradigms to ultimately guide their decisions for a research study and research design. They are separate and distinct according to their own underlying

principles and histories. The following recommendations provide additional guidelines to understand the comparison and to ascertain a foundation of decisional processes and critical thinking in social justice and equity research.

History and principles. A researcher using queer theory would likely need to examine the work of predecessors, such as Foucault (1980), Butler (1990, 2004), Sedgwick (1990, 1993), and Rubin (1984, 2011). In contrast, researchers using intersectionality would likely reference the works of Crenshaw (1988, 1989, 1991), Anzaldúa (1987), Collins (1986, 1990, 2015), Lorde (1984), hooks (1981, 1984, 1989), and Moraga and Anzaldúa (1983). Researchers using queer theory would likely investigate research questions associated with critiques intended to disrupt binaries and identity categories. In this scope, queer theory operates with a poststructural lens intended to give voice to multiple perspectives and meanings disrupting classifications of binaries and identity categories (Lugg, 2003). Thus, researchers using queer theory assume that identity categories need to be deconstructed as misguided illusory social constructions of power rather than identity markers associating lived experiences with specific communities. To understand power and complexity of social identities (Collins & Bilge, 2016), researchers using intersectionality, in contrast, would likely highlight linkages between social identities or linkages between forms of oppression (e.g., racism, genderism, heterosexism) as the crux of their research questions (Bowleg & Bauer, 2016; Bowleg, 2013, 2017; Warner & Shields, 2013). Thus, intersectionality scholars would still rely on the realities and experiences associated with specific identities by assuming that identities and intersections produce actual realities of marginalization.

The purpose of queer theory would involve a critique of identity categories and binaries, whereas intersectionality theory would involve identity categories to locate power, relationships, and complexity. The outcome of a study using queer theory would be a disruption of binaries and identity categories. The outcome of intersectionality theory carries implications for a systematic agenda toward social action, which highlights key aspects from the research study about action steps to change an inequitable system. This outcome from an intersectionality study would also likely focus on the realization of gaps located as a result of multiple marginalizations. These contrasting features of queer theory and intersectionality theory are important to consider, especially with the type of product offered as a result of the research contribution. Although research contributions using queer theory would involve a critique and disruption of identity categories, research using intersectionality theory would likely involve recommendations for action based on understanding intersecting forms of oppression.

Distinctions of power. Queer theory and intersectionality theory involve their own distinct relationships and assumptions of power. For intersectionality scholars, power is centered specifically in these intersections to illustrate visibility and to determine points to capitalize on social action. When scholars and researchers view through the lens of intersectionality, they examine realities attached to specific social identities (e.g., race, gender, sexuality), forms of oppression (e.g., racism, genderism, heterosexism), and their intersections lead to an understanding of which communities carry power and where inequities of power might exist (Bowleg, 2017).

Queer theory conversely involves a disruption of the boundaries held in identity categories and of binaries (Lugg, 2003; Plummer, 2011). Power is indicative of the boundaries associated with identity categories. Queer theory especially provides an assumption that power was an illusory social construction shown in identity categories and binaries. Thus, queer theory requires its poststructural lens to critique and disrupt binaries and identity categories as problematic social constructions.

Reflexive thinking and reflexivity. *Reflexivity* statements and reflexive thinking provide a platform to consider how the researchers inform the production of a research study and analysis in education (Plummer, 2011). The critical notions embedded in intersectionality theory and queer theory form the ideology that research, the phenomena of interest, and analyses are not objective processes (Crotty, 1998). Thus, reflexivity statements garner interrogative thinking that keeps researchers accountable to participants and the purpose of a research study. Nonetheless, they are helpful to illustrate researchers' intentionality with decisions in the study. Illustrating complexity and in-depth thinking through interrogating self, social location, and, hence, social conditions, reflexivity is not intended to distance researchers from their participants, but rather, reflexivity functions as an approach to remain conscious of researcher-participant relationships, inequities, and interactions of power and privilege (Fine et al., 2003). To understand reflexivity, researchers can, for instance, participate in journaling to note their experiences, emotions, and perspectives throughout the process of a study. As an additional example to address reflexive thinking, researchers can involve periodic meetings throughout a research study with communities of two to three other scholars to discuss their process, interpretations of data, and approaches within a research study.

Researchers should note the different approaches of reflexivity unique to queer theory and intersectionality theory. Queer theory and intersectionality theory can differ in their perspectives toward reflexivity. Intersectionality theory may prioritize the researchers' privilege, oppression, and power through their own social identities and intersections interacting with entities and individuals in their research. Queer theory may influence the approach toward reflexivity by informing researchers on how they are thinking within the forms of identity categories and binaries. To involve queer theory in reflexivity, researchers can likely think about how their own personal reflections and assumptions may reinforce specific binaries or interpretations in the lens of identity categories. Similarly, researchers can infuse this type of reflexivity in a research study by questioning how their interpretations of data may be consistent with reinforcing classifications of binaries and identity categories. Using the lens of queer theory, researchers can use reflexivity to aim more closely to the goal of disrupting binaries and identities as fixed, associated realities rather than social constructions.

Conclusion

Researchers can note the differences between queer theory and intersectionality theory as their own unique, distinct paradigms. Queer theory and intersectionality theory involve their own unique underlying principles ultimately forming decisions

for a research study. Although the evolution of empirical and conceptual research grounded in analytic frameworks of intersectionality theory and queer theory continues to grow exponentially, the provided list of recommended readings captures major luminaries augmenting movements and implementation grounded in both intersectionality theory and queer theory. Similarly, researchers attempting to complicate these frameworks should also examine a variety of recent theoretical frameworks generated by the substantiation of intersectionality and queer theory, such as queer of color critique (see Brockenbrough, 2015; McCready, 2013).

Recommended Readings

Ahmed, S. (2006). *Queer phenomenology: Orientations, objects, others*. Durham, NC: Duke University Press.

This book is useful for deconstructing lived experience influenced by contextual factors within phenomenological approaches and methods rather than associating with realities associated with identities.

Browne, K., & Nash, C. J. (Eds.). (2010). *Queer methods and methodologies: Intersecting queer theories and social science research*. Abingdon, UK: Ashgate Publishing.

This book provides multiple perspectives reflecting the implementation of queer theory in research. Researchers may find the text useful to assist with conceptualizing queer methods in their research design.

Collins, P. H., & Bilge, S. (2016). *Intersectionality*. Malden, MA: Polity Press.

This book offers an accessible description of principles, histories, and philosophies used to understand intersectionality. The text involves practices and movements associated with intersectionality to inform the conceptualization of intersectionality in practice, scholarship, and research.

Crenshaw, K. (1989). Demarginalizing the intersection of race and sex: A Black feminist critique of antidiscrimination doctrine, feminist theory and antiracist politics. *University of Chicago Legal Forum, 1989*(1), 139–167.

This article is a seminal contribution by Crenshaw as a major contributor to intersectionality scholarship. Researchers can use this article to inform historical context surrounding approaches involved in intersectionality.

Grzanka, P. R. (Ed.). (2014). *Intersectionality: A foundations and frontiers reader* (1st ed.). New York, NY: Westview Press.

This book provides several different viewpoints on intersectionality as a paradigm. The text involves discussions surrounding philosophical underpinnings and implementation for specific research methods.

Hancock, A.-M. (2016). *Intersectionality: An intellectual history*. New York, NY: Oxford University Press.

This book contextualizes the history of intersectionality by showcasing an understanding of its principles and key forerunners.

Lugg, C. A., & Murphy, J. P. (2014). Thinking whimsically: Queering the study of educational policy-making and politics. *International Journal of Qualitative Studies in Education, 27*(9), 1183–1204. https://doi.org/10.1080/09518398.2014.916009

This journal article reflects an application of queer theory, including underlying principles, to educational policy. Researchers might find the article useful for their understanding and foundation of principles informing the use of queer theory.

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