

12. KEYWORDS, DESCRIPTORS or IDENTIFIERS (Use semi-colon as a delimiter.)

Motivation ; Demographics ; Attracting ; Recruiting ; gender differences

13. ABSTRACT/RÉSUMÉ (When available in the document, the French version of the abstract must be included here.)

Background: This report presents the results of the Canadian Armed Forces (CAF) Prospect Survey data collected between November 2017 and February 2018. Launched 21 November 2017, the CAF Prospect Survey is a pop-up survey that is presented randomly to visitors of the CAF recruitment website. The survey was designed to provide information on 1) the types of individuals who are interested in the CAF and their reasons for visiting the CAF recruitment website, 2) how visitors first found the CAF recruitment website, 3) perceived benefits and drawbacks of joining the CAF, and 4) CAF career preferences and influential factors for those interested in joining the CAF. Method: A total of 16,665 participants completed the first screening question of the survey and were divided into four groups on the basis of their response, for which further analyses were conducted separately. The four groups included respondents who were curious about a CAF career (n = 2,268), respondents interested in a CAF career but not sure they will join (n = 3,908), respondents seriously considering joining the CAF (n = 3,997), and parents seeking information on a CAF career for their children who were interested or enrolled in the CAF (n = 105). For each group, this report presents descriptive results of the responses to survey questions, as well as comparisons of responses by first official language, age, gender, visible minority status, and Indigenous person status. Results: Key findings emerging across all four groups included that respondents most frequently discovered the CAF recruitment website through an online search tool (e.g., Google, Bing, or Yahoo), links on other websites, Facebook, or being told about it by somebody other than a recruiter. Advantages of a CAF career most frequently identified by respondents who were curious about a CAF career were job security, the opportunity to serve their country, the benefits, and free job training while on full-time salary. When asked to identify which strategy from a list would increase the attractiveness of a CAF career, respondents curious about a CAF career most often selected higher pay, the option not to work in a combat role, a better benefits package, and the ability to live in one place for longer. Barriers to joining most frequently identified by respondents who were interested but undecided about joining were that they had doubts about meeting the requirements, followed by the potential mental health consequences of combat service, lack of information, and loss of personal freedom and control. Respondents who were serious about joining the CAF most frequently indicated the following reasons for their interest in joining the CAF: for personal growth, for new experiences and an exciting life, to serve their country, and for the opportunity to make a difference. This report also uncovered notable differences in the factors attracting individuals to careers in the CAF based on their age, gender, ethnicity, and first official language. These differences may inform future marketing efforts targeting various groups of prospective recruits.

Contexte : Le présent rapport comprend les résultats du Sondage des Forces armées canadiennes (FAC) auprès des candidats potentiels obtenus à partir des données recueillies entre novembre 2017 et février 2018. Lancé le 21 novembre 2017, le sondage des FAC auprès des candidats potentiels est un sondage présenté dans une fenêtre publicitaire (pop-up) de façon aléatoire aux visiteurs du site Web de recrutement des FAC. Ce sondage a été conçu pour fournir des renseignements sur 1) les types de personnes qui s'intéressent aux FAC et les raisons pour lesquelles elles visitent le site Web de recrutement des FAC, 2) comment les visiteurs ont découvert le site Web de recrutement des FAC, 3) les avantages et les inconvénients perçus de s'enrôler dans les FAC et 4) les préférences professionnelles des personnes qui souhaitent s'enrôler dans les FAC et les facteurs les influençant. Méthode : Au total, 16 665 participants ont répondu à la première question de présélection du sondage pour être ensuite répartis en quatre groupes en fonction de leur réponse, et pour lesquels des analyses complémentaires ont été effectuées séparément. Les quatre groupes comprenaient des répondants curieux à propos d'une carrière au sein des FAC (n = 2 268), des répondants intéressés par une carrière au sein des FAC sans être certains de s'enrôler (n = 3 908), des répondants qui envisageaient sérieusement de s'enrôler (n = 3 997), et enfin des parents à la recherche de renseignements sur une carrière au sein des FAC pour leurs enfants qui étaient intéressés à s'enrôler ou s'étaient déjà enrôlés (n = 105). Pour chaque groupe, le rapport présente les résultats descriptifs des réponses aux questions du sondage, ainsi que des comparaisons de ces réponses selon la première langue officielle, l'âge, le sexe, l'appartenance à

une minorité visible et le statut de personne autochtone. Résultats : Parmi les principales constatations dégagées des quatre groupes, mentionnons que les répondants ont le plus souvent découvert le site Web de recrutement des FAC au moyen d'un outil de recherche en ligne (p. ex. Google, Bing ou Yahoo), de liens accédés depuis d'autres sites Web ou Facebook, ou lorsqu'une personne autre qu'un recruteur leur a parlé du site. Les avantages d'une carrière au sein des FAC les plus souvent mentionnés par les répondants qui étaient curieux de connaître les possibilités de carrière au sein des FAC étaient la sécurité d'emploi, la possibilité de servir leur pays, ainsi que l'accès à des avantages sociaux et une formation professionnelle gratuite tout en étant salarié à temps plein. Lorsqu'on leur a demandé d'identifier à partir d'une liste la stratégie qui augmenterait le plus pour eux l'attrait de poursuivre une carrière au sein des FAC, les répondants curieux d'en savoir plus sur la possibilité de faire carrière au sein des FAC ont le plus souvent choisi un salaire plus élevé, la possibilité de ne pas travailler dans un rôle de combat, un meilleur ensemble d'avantages sociaux et la possibilité de vivre au même endroit pendant plus longtemps. Les obstacles à l'enrôlement les plus souvent cités par les répondants se disant intéressés, mais indécis, étaient dans l'ordre les suivants : ils avaient des doutes quant à pouvoir rencontrer les exigences, les conséquences potentielles sur la santé mentale de devoir servir au combat, le manque d'information et la perte de liberté personnelle et de contrôle. Les répondants qui envisageaient sérieusement de s'enrôler dans les FAC ont le plus souvent indiqué les raisons suivantes pour expliquer leur intérêt à s'enrôler : pour leur développement personnel, pour de nouvelles expériences et une vie passionnante, pour servir leur pays et pour avoir l'occasion de faire une différence. Le rapport a également révélé des différences notables dans les facteurs attirant les gens vers une carrière au sein des FAC en fonction de leur âge, de leur sexe, de leur origine ethnique et de leur première langue officielle. Ces différences pourront éclairer de futurs efforts de marketing ciblant les divers groupes de recrues potentielles.

s.19(1)

From: @ADM(PA) DPAP0@Ottawa-Hull
Sent: September 9, 2019 12:08 PM
To: Godin Col SMM@ADM(PA) DPAP0@Ottawa-Hull
Cc: Stewart Maj EJH@ADM(PA) DPAP0@Ottawa-Hull
Subject: FW: AAA Course
Attachments: Joining Instructions Draft - letterhead.docx

Ma'am,

FYSA - My joining instrs for the AAA crse (23 Sep – 8 Nov).

Of note, I've a pre-reading / online work portion that would be best actioned away from the office next wk. Proposed date TBD once I've better visibility on next wk's ops tempo.

5. Course candidates are to log-in to the DLN Learning Portal six days prior to the beginning of the face-to-face phase. The DPALC will invite candidates into the course site NLT 16 September. The distance learning phase includes readings, self-study and discussion forum posts that must be completed prior to the in-class component.

18. The course starts with mandatory pre-reading and online activities through DL; these should take no more than seven hours in the week leading up to the in-class phase.

MSC – PLS

Tel: / BB:

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: September-05-19 9:10 AM
To: @ADM(PA) DPAP0@Ottawa-Hull < @forces.gc.ca>;
@CJOC CJWC@Ottawa-Hull < @forces.gc.ca>
Subject: AAA Course

Sending you this in advance of an –e-mail with all course nominees. You are both on the course. Please follow the directions in the attached doc. Dave Bowen is POC

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

A0447795_1-001003

Director-General
Military Strategic Communication



Directeur général
communication stratégiques militaires

National Defence
Headquarters
Ottawa, Ontario
K1A 0K2

Quartier général de
la Défense nationale
Ottawa, Ontario
K1A 0K2

Joining and Administrative Instructions:

Advanced Actor and Audience Analysis Training Course

Serial 1901 – Gatineau, QC

General

1. (A4TC) Course is an intensive training course delivered at the Defence Public Affairs Learning (DPALC), located in the National Capital Region (NCR). This serial will be delivered in English.
2. Through a combination of course readings, interactive lectures, case studies and guided discussions, A4TC candidates will first learn the basic psychology and science behind behavior change and perception, followed by an internationally recognized actor and audience analysis methodology, campaign planning, and then apply the methodology to a real life case study, with results delivered to CAF leadership.
3. The DPALC is an internationally recognized training and development establishment serving the needs of the Canadian Armed Forces (CAF) and the Department of National Defence (DND). It is located in Gatineau, Quebec, adjacent to the capital city of Ottawa, Ontario. Regular and Reserve Force members of the CAF, government employees and international military personnel regularly attend the DPALC for training in the areas of military public affairs, social media, communication products, photojournalism, media relations, crisis communications and, now, StratCom.

Delivery

4. The course will take place at the DPALC in the National Printing Bureau (NPB) building located at 45 Boulevard Sacré-Coeur, Gatineau, QC.

Reporting In

5. Course candidates are to log-in to the DLN Learning Portal six days prior to the beginning of the face-to-face phase. The DPALC will invite candidates into the course site NLT 16 September. The distance learning phase includes readings, self-study and discussion forum posts that must be completed prior to the in-class component.
6. For access to the NPB during the in-class phase, course candidates must report to the Commissionaire's desk located in the lobby at the east entrance with government-issued ID by

0720 hrs on Monday 23 September 2019. Please be patient; this process may take some time. Candidates will be directed to DPALC's classroom on the third floor (E-3300).

Temporary Duty (TD)/Travel Costs

7. Candidate's home units or sponsoring or parent organizations are responsible for covering TD/travel costs for Regular and Reserve Force personnel and civilian employees participating in this training.
8. Parent units are responsible for travel claim preparation and all travel arrangements.
9. Reserve Force units are responsible for Reserve pay.
10. For civilian employees, parent units or sponsoring or parent organizations are responsible for travel costs, claim preparation, travel arrangements and any overtime pay.

Accommodation

11. All out-of-town candidates' home units or sponsoring or parent organizations are responsible for booking their accommodation.

Meals

12. Candidates are responsible for their own meals throughout the course. There is a cafeteria located on the first floor at the west end of the building and there are some private businesses within walking distance. A fridge and microwave are available to candidates for the duration of the course.

Transportation

13. Candidates are responsible for their own transportation to and from Ottawa and, while in the NCR, to and from the DPALC, hotel and airport or train station, as applicable.

Parking

14. For candidates who require parking, a weekly parking pass can be purchased from Vinci Parking. The Vinci Parking office is accessed through the doors to the left of the Commissionaires' desk at the west entrance to the NPB building. Alternatively, daily parking passes can be purchased through the machines located at the parking lot entrances

Online Course Access and Communication

15. All candidates will access A4TC content via the DLN Learning Portal (note: this is not the same platform as the DLN LMS). This platform is accessible from any DWAN or Internet-accessible device. Any candidates that do not already have a DLN Learning Portal account must register for one as soon as possible via this link: <https://lp-pa.forces.gc.ca/portal/users#/register>. Candidates will receive notification that they have been added to the course site no later than six days prior to the first day of in-class training.

16. The DPALC requires your most readily accessible email address in order to facilitate timely communication before, during and after training. Send this information to Mr. Claudio Di Franco, Logistics Officer, at claudio.difranco@forces.gc.ca.

Class Schedule

17. If candidates encounter technical issues during the DL phase, please contact Marc-André Clément at marc-andre.clement2@forces.gc.ca.

18. The course starts with mandatory pre-reading and online activities through DL; these should take no more than seven hours in the week leading up to the in-class phase. The in-class phase starts at 0800 hrs on Monday, September 23, 2019, in the DPALC's third floor, east-wing classroom, E-3300, and finishes no later than 1230 hrs on Friday, November 8, 2019. Candidates shall not make any travel arrangements that will interfere with course timings.

19. Classes will normally be held from 0800 hours to 1700 hours, Monday to Friday, with possible evening reading and group homework. The DPALC may adjust timings, as necessary, due to unforeseen circumstances. As the course requires syndicate-level work that may need to be completed after normal working hours, candidates should expect to contribute one or two additional hours to their learning each evening. Overtime costs will not be borne by the DPALC. Civilian personnel must arrange for overtime pay at their home locations in accordance with their collective agreements.

Computers

20. Each candidate requires a stand-alone laptop computer (not DWAN) for the duration of the course. The laptop must have Wi-Fi and basic word processing capability. Candidates are advised to source a suitable laptop (personal laptops are ideal). The DPALC retains a limited number of laptops for loan to candidates. If you require a laptop, please identify this requirement to Mr. Claudio Di Franco, as per para 27. Candidates will have access to printers and Wi-Fi.

Dress

21. Dress of the day for the in-class phase is Civilian casual, ripped, worn or inappropriate clothing will not be accepted. Candidates shall wear their building passes (issued at the Commissionaire's desk upon arrival) and have identification with them at all times.

22. For wardrobe planning purposes, be advised that there are no planned social functions during this course.

Recreational Facilities

23. A small gym is available in the basement of the NPB for those who are interested.

Telephone Messages

24. For emergencies during the F2F phase, candidates can be reached through the Course Officer, Major Dave Bowen, at Dave.Bowen@forces.gc.ca or at 613-217-8121.

Course Reports

25. Successful candidates will sign and receive a copy of their course report on the last day of the course. The original document will be sent to the candidate's home unit through his/her chain of command.

Point of Contact

26. If you have any questions about the administration of the A4TC, please contact Mr. Claudio Di Franco, Logistics Officer, at claudio.difranco@forces.gc.ca or 819-997-4311. For emergencies, call 613-295-2254 or 613-462-2036.

Dave Bowen
Major
Course Officer
26 August 2019

s.19(1)

From: [Godin.Col.SMM@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Godin.Col.SMM@ADM(PA).DPAPO@Ottawa-Hull)
Sent: September 9, 2019 12:14 PM
To: _____@ADM(PA).DPAPO@Ottawa-Hull
Cc: [Stewart.Maj.EJH@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Stewart.Maj.EJH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: AAA Course

Agreed. Let's look at a date next week that works best.

LCol Stéphanie Godin

Head, Military Strategic Communications – Personnel and Legal Services
Canadian Armed Forces
stephanie.godin@forces.gc.ca / Tel : 613-901-8812 / BB: 613-790-2735

Chef des affaires publiques - Communications stratégiques militaires - Personnel et services
juridiques
Ministère de la Défense nationale / Gouvernement du Canada

stephanie.godin@forces.gc.ca / Tél. : 613-901-8812 / BB: 613-790-2735

From: @ADM(PA).DPAPO@Ottawa-Hull
Sent: September 9, 2019 12:08 PM
To: Godin LCol.SMM@ADM(PA).DPAPO@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>
Cc: Stewart.Maj.EJH@ADM(PA).DPAPO@Ottawa-Hull <Edward.Stewart@forces.gc.ca>
Subject: FW: AAA Course

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Tel: / BB:

From: Allison LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: September-05-19 9:10 AM

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To: @ADM(PA) DPAPO@Ottawa-Hull <@forces.gc.ca>;
@CJOC CJWC@Ottawa-Hull <@forces.gc.ca>
Subject: AAA Course

Sending you this in advance of an –e-mail with all course nominees. You are both on the course.
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3291

s.19(1)

From: @ADM(PA) DPAP0@Ottawa-Hull
Sent: September 25, 2019 8:52 AM
To: Godin Col SMM@ADM(PA) DPAP0@Ottawa-Hull
Cc: Stewart Maj EJH@ADM(PA) DPAP0@Ottawa-Hull
Subject: Re: AAA crse Live Case Study

Ma'am,

Turns out DComd is tracking and that MPGG is the main client. The established POC for our course staff is LCol Owens (CFRG SSO Policy/Doctrine) for RFIs. This is not really that efficient by my eye because there are obvious interests throughout MPC — COS Strat (Kairos Passant targeting info), DHRD, DGMPPRA... not just CFRG. To avoid delays, such RFIs would be best centralized with COS Ops sp (and probably coord with PLS) as an overseer of the entire MPC/CMP org.

LCol Allison will be able to fill in the blanks. I have to go do some school work now;)...

Pers & Legal Svcs PA
Tel: / Cell:

> On Sep 25, 2019, at 8:20 AM, Godin LCol SMM@ADM(PA) DPAP0@Ottawa-Hull
<STEPHANIE.GODIN@forces.gc.ca> wrote:

>
>
>

> Thanks for the looking at consolidating the RFIs. I am sure this will go a long way in ensuring cooperation, especially since we won't be seeing immediate benefit from the case study. Hopefully though, the results will be useful in yielding results for MPGG. This is a big investment. No pressure ;-)

>

> LCol Stéphanie Godin

>

> Head, Military Strategic Communications – Personnel and Legal Services

> Canadian Armed Forces

> stephanie.godin@forces.gc.ca / Tel : 613-901-8812 / BB: 613-790-2735

>

> Chef des affaires publiques - Communications stratégiques militaires - Personnel et services juridiques

> Ministère de la Défense nationale / Gouvernement du Canada

> stephanie.godin@forces.gc.ca / Tél. : 613-901-8812 / BB: 613-790-2735

>

> -----Original Message-----

> From: Stewart Maj EJH@ADM(PA) DPAP0@Ottawa-Hull

> Sent: September 25, 2019 8:15 AM

> To: @ADM(PA) DPAP0@Ottawa-Hull <@forces.gc.ca>

> Cc: Godin LCol SMM@ADM(PA) DPAP0@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>

> Subject: RE: AAA crse Live Case Study

>

>

>

> This was one of the reasons we were putting you on the course and one of the reasons they were happy that PLS PA submitted a senior PAO: because the case studies were going to be MPGG-centric.

>

> Major Edward Stewart

> MSC-PLS | CSM-PSJ

> NDHQ/QGDN (CC): 613.901.8849

A0447798_1-001010

s.19(1)

> NDHQ/QGDN (101) 613.943.3634
> M/C: 613.302.9794
>
> -----Original Message-----
> From: @ADM(PA) DPAP0@Ottawa-Hull
> Sent: September-25-19 8:13 AM
> To: Godin LCol SMM@ADM(PA) DPAP0@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>
> Cc: Stewart Maj EJH@ADM(PA) DPAP0@Ottawa-Hull <Edward.Stewart@forces.gc.ca>
> Subject: AAA crse Live Case Study
>
> Ma'am,
>
> FYSA - My AAA course is conducting a target audience analysis live case study for recruitment of underrepresented female minorities from Canadian society into the CAF. This will take place over the next seven wks and will be presented to MPC at the completion of this course.
>
> Odd that we did not learn of this at PLS prior. Maj Dave Bowen mentions that BGen Janzen handled this "Gen to Gen"— most likely with Comd MPGG — unconfirmed at this time (Dave doesn't know).
>
> Consideration at this time is that while my course appears to be supporting recruitment, and unless further coordinated, a number of RFIs will be submitted by a separate MSC / PA org into a variety of MPC/CMP L2/3s without PLS awareness.
>
> I've suggested to Dave that he or LCol Allison reach over to you to explain further. No matter, I've pointed out that these RFIs will need to be consolidated and verified (we have 4 x syndicates conducting individual study) before they are submitted IOT not piss off half of MPC in a disorganized fashion.
>

> Pers & Legal Svcs PA
> Tel: / Cell:

A0447798_2-001011

s.19(1)

From: [REDACTED]
Sent: October 8, 2019 12:58 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: [REDACTED]
Subject: Status Report
Attachments: DND 2019 BDM Course Feedback week 1 and 2.pdf; DND 2019
BDM Course Week 1 Progress Report.pdf

Dear LCol Allison,

Please find attached the quarter mark project status report. I know most of what is in here has been relayed to you by Maj. Bowen already, and we also briefly spoke last Wednesday. The main question is around the quantitative data collection effort (what to do with this).

If you would like more information please let me know, I can add sections to this report and subsequent reports.

Kind regards,



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emic Consulting

**Pages 1013 to / à 1019
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

s.19(1)

Project Status Report			
 Risks Off Track On Track	Reporting Period:	Week 1: 23 rd September to 27 th September	
	Date of Report:	1 st October	
	Report Author:		
	Project Title:	DND Strategic Communication and Actor and Audience Analysis Course	
Project Status:	On Track	Contract Number:	W6369-19-X033/A

Overall Comments
<p>Weeks one and two of the course were delivered as scheduled. The feedback from the trainees has been overwhelmingly positive, and the training team have been able to deal with all trainee feedback (such as requests for clarifications) on an ongoing basis.</p> <p>In week two, an individual progress survey was sent out in addition to the feedback survey asking trainees which sessions they would like to re-cap, whether they would like any additional training on topics covered, and offering 1-to-1 sessions with trainees who would like additional tutoring or ask questions. These sessions will be scheduled in the study week of the course.</p> <p>In week 1, the original case study topic (recruitment of women from ethnic minorities) was changed to the recruitment of women into Combat Arms on the basis of phase 1 of the Behavioural Dynamics Methodology (problem space analysis). Data suggests that recruitment quotas for ethnic minorities are met overall, and that quotas for women are not met notably for the Combat Arms. The focus of the Case Study was shifted on the basis of trainee recommendations in consultation with the course lead Maj. Dave Bowen, as has been communicated prior by Maj. Bowen.</p> <p>The election period is the only significant activity that has some impact the conduct of the course; it was decided in consultation with Maj. Bowen before the start of the course that two rounds of qualitative research (instead of one round) would work best for the case study topic, and that quantitative research would be taught, though not rolled out in practice (i.e. without data collection). This does not impact the skills training or lectures on the topic (trainees will still design the quantitative research component and learn about quantitative analysis) yet it does mean that the budget allocated to quantitative data collection (66,250.00 Canadian Dollars) is left unallocated.</p> <p>Please could the technical authority advise on:</p> <ul style="list-style-type: none"> - How this should be dealt with from a contractual standpoint (the contract stipulates that quantitative and qualitative research has to be conducted, though the former needs special permissions during the election period and additionally the course lead requested for this to be taught without 'live data collection'). - What to notify the contracting authority of. For example whether to adjust the total contractual amount, or a suggestion that has been offered by Maj. Bowen would be to use this fund towards the creation of online course materials for future use.

Project Status Report			
 Risks Off Track On Track	Reporting Period:	Week 1: 23 rd September to 27 th September	
	Date of Report:	1 st October	
	Report Author:		
	Project Title:	DND Strategic Communication and Actor and Audience Analysis Course	
Project Status:	On Track	Contract Number:	W6369-19-X033/A

Item / Task / Deliverable	Comments	Action required?
Week 1 and week 2 Lectures	All week 1 and 2 lectures have been delivered as scheduled with minor adjustments to timings to accommodate syndicate progress.	No
Trainee feedback week 1 and 2	Each week we obtain feedback from the trainees through an online survey. Each session and the week as a whole is rated on a scale of 1 to 5. (1=poor, 2=below average, 3=average, 4=good, 5=excellent). The feedback for week one of the course was 4.6 overall, and week 2 of the course was 4.4 overall. A more detailed feedback report is submitted separately alongside this progress report.	No
Trainee concerns regarding course materials	No major trainee concerns regarding course materials have been shared in the feedback surveys.	No
Trainer concerns regarding trainee performance	Though no formal assessments have taken place to date, the training team currently has no concerns regarding trainee performance. One trainee, has missed week one of the course (she was attending another course) and parts of week 2, however we are doing what we can to bring her up to speed and has read all course materials thus far and is good at coming forward with questions (it helps that she has a background in Psychology). All trainees participate well in class and during syndicate work. Trainees will have a mid-course exam at the beginning of week 4. The mid-course progress report will include information on the performance of each trainee.	No
Overall live case study status	Some of the live case study background research had to be conducted again after the case study topic changed, and as one trainee mentioned in the feedback, this caused for a little bit of rush into the case study. Overall however, the case study is progressing very well.	No
Qualitative research live case study status	Interviews have been scheduled for October 9 th and 28 th . Thus far recruitment is on track.	No
Quantitative research live case study status	Please see the overall comments section for details on the changes to the quantitative research component.	Yes, by the Technical Authority.

s.19(1)

From:
Sent: November 4, 2019 8:31 PM
To: [Allison LCol DE@ADM\(PA\) DPAPQ@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull);
Subject: Status report and action items
Attachments: DND 2019 BDM Course Feedback week 1 2 3 and 4.pdf; DND AAA Course Mid-course Exam Scores.xlsx; DND 2019 BDM Course Week 3 to 5 Progress Report.pdf

Dear LCol Allison and Maj. Bowen,

Please find attached the latest status report, the trainee feedback up to week 4, and the exam scores for the mid-term exam.

There are a few action items listed in the attached.

Please let me know if you have any questions.

Best wishes,

www.emicconsulting.co.uk

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Name	Candidate number	Score	%
	09	58	97
	17	55	92
	18	55	92
	11	54	90
	16	54	90
	19	54	90
	04	53	88
	08	53	88
	14	53	88
	02	52	87
	06	51	85
	10	51	85
	03	49	82
	01	48	80
	15	47	78
	05	44	73
	13	43	72
	12	40	67
	20	38	63
	07	N/A	N/A

s.19(1)

Note


has worked very hard and finds the material challenging; she is improving fast.
has worked incredibly hard and has practiced exam questions in his 1-2-1. He has
had been absent for most of the first 3 weeks and the study week

no background in social science so this is a good score

Project Status Report			
 Risks Off Track On Track	Reporting Period:	Week 3 to 5: 30 th September to 25 th October	
	Date of Report:	4 November	
	Report Author:		
	Project Title:	DND Strategic Communication and Actor and Audience Analysis Course	
Project Status:	On Track	Contract Number:	W6369-19-X033/A

Overall Comments
<p>Weeks three to five of the course were delivered as scheduled. The feedback from the trainees has remained very positive throughout the weeks, and the training team have been able to deal with all trainee feedback on an ongoing basis.</p> <p>The trainee feedback from weeks 3 and 4 has been added to the feedback from weeks 1 and 2 and is attached alongside this status report.</p> <p>During the study week (in between weeks 3 and 4), two afternoon sessions were scheduled in for trainees to cover things they requested to re-cap, and 1-2-1s were held with the trainees who had requested this.</p> <p>In week 4, trainees sat their first exam, and all passed with good marks. The exam scores are attached alongside this status report.</p> <p>As covered in the prior status report, the budget allocated to quantitative data collection (66,250.00 Canadian Dollars) is left unallocated. We have been attempting to roll out a small-scale quant survey, but we are still awaiting permissions (Public Opinion Research as per the Government of Canada's definition is not allowed because we are still in the election period, and we have been attempting to make all questions behavioural but in any behavioural model there are a number of attitudinal questions – removing these will invalidate the model.) We will attempt to obtain the permissions for a sample size of around 300-400 (statistically valid, yet much smaller scale than originally intended) so we can receive the data in time for the final report. Either way, most of the quant budget will still remain unallocated:</p> <p>Please could the technical authority advise on:</p> <ul style="list-style-type: none"> - How this should be dealt with from a contractual standpoint (the contract stipulates that quantitative and qualitative research has to be conducted, though the former needs special permissions during the election period and additionally the course lead requested for this to be taught without 'live data collection'). - What to notify the contracting authority of. For example whether to adjust the total contractual amount, or a suggestion that has been offered by Maj. Bowen would be to use this fund towards the creation of online course materials for future use.

s.19(1)

Project Status Report			
 <p>Risks Off Track On Track</p>	Reporting Period:	Week 3 to 5: 30 th September to 25 th October	
	Date of Report:	4 November	
	Report Author:		
	Project Title:	DND Strategic Communication and Actor and Audience Analysis Course	
Project Status:	On Track	Contract Number:	W6369-19-X033/A

Item / Task / Deliverable	Comments	Action required?
Week 3, 4 and 5 Lectures	All week 3, 4 and 5 lectures have been delivered as scheduled with minor adjustments to timings to accommodate syndicate progress.	No
Trainee feedback week 3 and 4	Each week we obtain feedback from the trainees through an online survey. Each session and the week as a whole is rated on a scale of 1 to 5. (1=poor, 2=below average, 3=average, 4=good, 5=excellent). The feedback for weeks 3 and 4 was 4.6 each week. A more detailed feedback report is submitted separately alongside this progress report.	No
Trainee concerns regarding course materials	No major trainee concerns regarding course materials have been shared in the feedback surveys.	No
Trainer concerns regarding trainee performance	After the first exam, the training team has no concerns regarding trainee performance. One trainee, _____ has missed much of the first 3 weeks as mentioned in the first status report, yet she has passed the exam and is catching up fast. All trainees participate well in class and during syndicate work. _____ left the course due to _____, and has returned on November 4 th . He has missed a significant portion of the course (notably all the quantitative materials). The training team has offered to help where possible to catch him up and will encourage him to sit the final exam.	No
Overall live case study status	Overall however, the case study is progressing very well.	No
Qualitative research live case study status	9 Interviews have conducted on October 9 th and 13 interviews have been conducted on October 28 th . A further focus group will be conducted on November 5 th in lieu of _____ and _____ conducting guest lectures (they have had to cancel as discussed, and their original session will be covered by the training team)	No
Quantitative research live case study status	Please see the overall comments section for details on the changes to the quantitative research component.	Yes, by the Technical Authority.
Certification	The course certificates are awaiting signing by General Janzen before the 8 th Nov.	Yes, by Maj. Dave Bowen

From: [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum_LCol_AE@ADM(PA)_DPAPO@Ottawa-Hull)
Sent: November 14, 2019 7:06 AM
To: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead_Maj_DJ@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: FW: CDS Ops next week
Attachments: CDS Quad.pptx

Doug,

As discussed, I will work on the slide deck this morning.

-AES

From: Antimatic 66A [mailto:antimatic@gmail.com]
Sent: November-13-19 5:19 PM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>
Subject: Re: CDS Ops next week

Sir,

How about this?

D

On Wed, Nov 13, 2019 at 4:03 PM <ANDRE.SALLOUM@forces.gc.ca> wrote:

Dave,

Could you please ensure to provide something by this evening if feasible.

Thanks.

- AES

Sent from my iPhone

On Nov 13, 2019, at 8:55 AM, Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull
<Dave.Bowen@forces.gc.ca<mailto:Dave.Bowen@forces.gc.ca>> wrote:

Ack Sir, this is my focus, I will have something for you by this evening with supporting imagery.

Dave

Sent from my iPhone

On Nov 13, 2019, at 8:28 AM, Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
<ANDRE.SALLOUM@forces.gc.ca<mailto:ANDRE.SALLOUM@forces.gc.ca>> wrote:

Dave,

I took a first crack at developing some talking points for the ADM (PA). Please note

below.

Feel free to edit, change and add further comments. But, focus on the importance of this course for CAF Leadership and how candidates will be able to support shaping the Information Environment.

Could you also provide information on where most of the candidates came from. For example, we had candidates from ADM (S&T), CJOC, CA, RCN, CMP, the newly established Military Strategic Communication Team, etc.

Also, a focus on the case study, a short note on the findings and how this case study is relevant and process be adopted in support to respective L1s and operations.

If you can send me something to me by tonight to review, I would appreciate it. If feasible.

Thanks.

-AES

The first Advanced Actor and Audience Analysis Training Course (4ATC)

· The first Advanced Actor and Audience Analysis Training Course (4ATC) was recently held at the Defence Public Affairs Learning Centre. Graduation occurred on Friday, November 8th.

· Canada was the first NATO country to undertake this seven week course. Twenty (?) personnel, which included military and civilian members from the Defence Community successfully completed the course.

· Through a combination of course readings, interactive lectures, case studies and guided discussions, A4TC candidates were introduced to the basic psychology and science behind behavior change and perception.

· Candidates also gained an understanding of how to conduct actor and audience analysis methodology, campaign planning, and how to apply the methodology to real life scenarios.

· As part of the seven week program, candidates worked closely with MPG on a case study to research a very important topic: "Recruiting Women into the Combat Arms."

The 4ATC is a world renowned training course and was organized in support to the initial phase of the Military Strategic Communication and Public Affairs Operationalisation Force Development Plan.

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: November-12-19 4:31 PM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
<ANDRE.SALLOUM@forces.gc.ca<mailto:ANDRE.SALLOUM@forces.gc.ca>>
Subject: CDS Ops next week

Andre, BGEN Janzen would like Dave Bowen to put together a short synopsis of the AAA course for ADM to give next Tuesday. 60-90 seconds should do it

Sent from my BlackBerry 10 smartphone on the Bell network.

s.20(1)(c)

Advanced Actor and Audience Analysis Training Course (A4TC)

- Seven-week duration (Sep - Nov 19)
- Delivered by civilian experts with experience training
- 20 pers trained from ADM(PA) StratCom team, CJOC, CA, RCN, CMP, ADM(S&T).



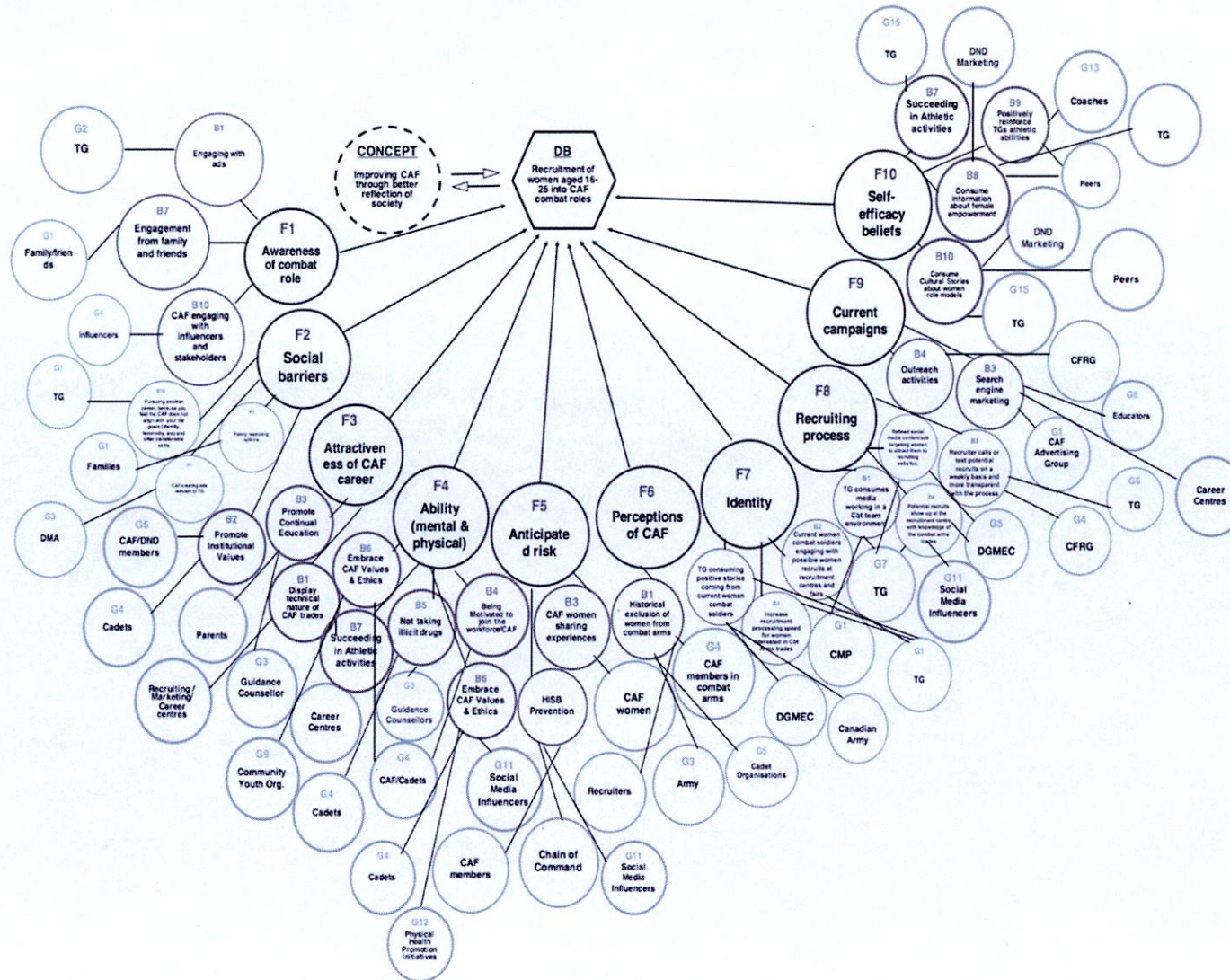
Page 1032

**is withheld pursuant to sections
est retenue en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Case study: Recruiting Women into the Combat Arms



From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: November 14, 2019 10:50 AM
To: [Janzen BGen JH@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull); [Henderson C@ADM\(PA\).@Ottawa-Hull](mailto:Henderson.C@ADM(PA).@Ottawa-Hull)
Subject: FW: 4ATC Power Point in support to CDS Ops
Attachments: CDS Ops_19 November_ADM (PA).pptx

Sirs,

As directed, attached is a synopsis of the AAA course that recently graduated 20 candidates.

Though this may be more information than is necessary/appropriate for a CDS Ops update, it nonetheless is a good encapsulation of what the new capability will allow us to do.

I leave it to the ADM(PA) to determine how much of this he wants to use in a CDS Ops context. Any additional info can be provided as necessary.

From: Salloum LCol AE@ADM(PA).DPAPO@Ottawa-Hull
Sent: November-14-19 10:44 AM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: Keirstead Maj DJ@ADM(PA).DPAPO@Ottawa-Hull <Doug.Keirstead@forces.gc.ca>; Neron MWO JF@ADM(PA).DGPA@Ottawa-Hull <Jean-Francois.Neron@forces.gc.ca>; Bowen Maj D@ADM(PA).DGPA@Ottawa-Hull <Dave.Bowen@forces.gc.ca>
Subject: 4ATC Power Point in support to CDS Ops

Doug,

With help from Maj Bowen, you will find the slide deck BGen Janzen asked for in support to next week's CDS Ops.

Please feel free to edit and add further information as necessary (especially in the Key Take Aways section – last slide).

As you can see, we have provided a great deal of information knowing that the ADM (PA) will need to fully understand this complex subject before he presents to the CDS and other L1s.

It will be easier for Mr. Henderson to edit out information (from the slide deck) if he has a chance to review the slide deck as is and takes out what he feels is unnecessary information.

If you, BGen Janzen or the ADM have any questions or require further details, please reach out to me or Maj Bowen directly.

Thanks.

-AES

Lieutenant Colonel / Lieutenant colonel Andre E. Salloum

Commanding Officer, Military Strategic Communication Team
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces
andre.salloum@forces.gc.ca / Tel: 613-991-9383 / Mobile: 613-325-7620

Commandant, Équipe de communication stratégique militaire
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes
andre.salloum@forces.gc.ca / Tél: 613-991-9383 / Cellulaire: 613-325-7620



National
Defence

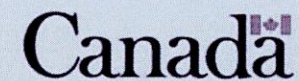
Défense
nationale



Assistant Deputy Minister (Public Affairs)

Background Brief on the Advanced Actor and Audience Analysis Training Course (4ATC)

19 November 2019





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Advanced Actor and Audience Analysis Training Course (A4TC)

Who we are:

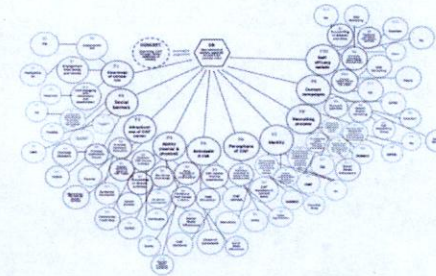
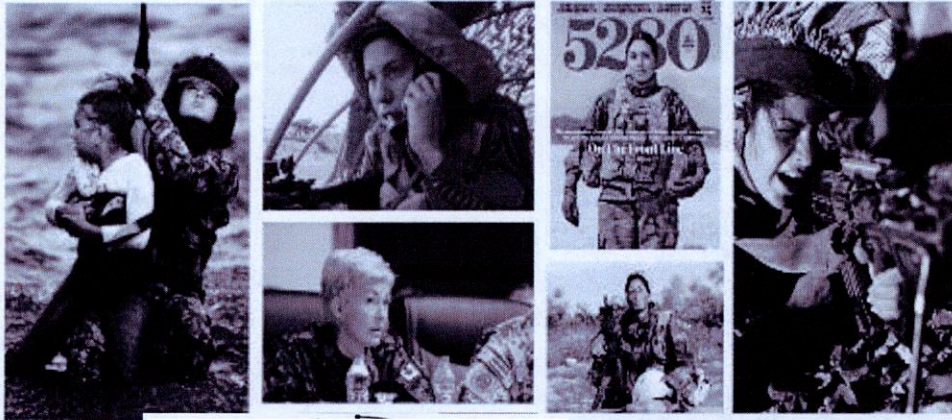
The new modern army

The new wave

Female history is now

A rationale for the evolution of the military. Making a tangible case for why the army **need** tough females on the front line, to neutralise any sense that this is merely a gender equality experiment.

It needs to state the case for tough female combat arms personnel, and extol the benefits of diverse capabilities, mindsets and specific roles that females are uniquely able to fulfil in order to defeat badness and bring peace and liberation to the powerless.





Advanced Actor and Audience Analysis Training Course (A4TC)

- The first Canadian Advanced Actor and Audience Analysis Training Course (4ATC) was recently held at the Defence Public Affairs Learning Centre (Gatineau / NPB). Graduation occurred on Friday, November 8th.
- Canada and the Netherlands are the first NATO countries to run this seven week course. Twenty civilian and military (Aviator to Major) candidates from throughout the Defence Community, including ADM (PA)'s newly established Military Strategic Communication Team, ADM (S&T), CJOC, CA, RCN, and CMP successfully completed the course.
- The seven week course was delivered at the Masters and PhD level and graded on the Oxford University Scale.
- Four candidates graduated with Distinction, bringing the total number of Canadians that have graduated with the "Distinguished Designation" to six.



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Advanced Actor and Audience Analysis Training Course (A4TC)

- The focus of the course was centered on the Behavioral Dynamic Methodology (BDM), which is a scientific approach to conducting effective and measurable STRATCOM, along with influence and behavior change.
- The BDM was developed by EMIC Consulting and
- This course is world renowned within NATO nations for teaching methods to understand and effect behavior change and influence in support to Operations. As part of the BDM, candidates are taught about Target Audience Analysis (TAA), which is an essential pillar of STRATCOM.
- In essence, the BDM is partly designed to uncover IF you have a chance to change or influence behaviour. The BDM is not a 'formula' for success, nor can you change every behaviour in every group of people; however if used correctly, it can be an effective STRATCOM enabler to any Mission.



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Advanced Actor and Audience Analysis Training Course (A4TC)

The Behavioral Dynamic Methodology:



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Advanced Actor and Audience Analysis Training Course (A4TC)

The Behavioral Dynamic Methodology:





Advanced Actor and Audience Analysis Training Course (A4TC)

- Through a combination of course readings, interactive lectures, live case studies and guided discussions, A4TC candidates were introduced to the intricacies of behavioural science, research methods, influence and ethical behaviour change.
- Candidates also gained extensive knowledge of behavioural profiling and how to conduct actor and audience analysis methodology, campaign planning, methods of evaluation, qualitative and quantitative research design and how to apply the methodology to real life operational scenarios.
- As part of the seven week course, candidates worked closely with the MPG on a live case study: *Recruiting Women into the Combat Arms*.
- The research involved the requirement to produce detailed behavioral profiles, problem space mapping, and included two rounds of Qualitative research, and Quantitative instrument design. The final result of the case study was grounded in behavioral science and accurate due to the use of the Behavioral Dynamic Methodology.



Advanced Actor and Audience Analysis Training Course (A4TC)

Key Take Aways

- Candidates were taught that there is a requirement to spend more time thinking about the problem space and the problem through brainstorming and researching at the front-end. The solution will come; however, the problem needs to be thoroughly studied and understood.
- The 4ATC was organized in support to the initial phase of the Military Strategic Communication and Public Affairs Operationalization Force Development Plan, which means that ADM (PA) now has an Analysis and Campaign Team, fully trained and ready to support L1s, along with Domestic and Expeditionary operations.
- This course was also develop to train PAOs to become more operational and to use Target Audience Analysis, along with Etic and Emic methods to solve problems on behave of their respective L1s.
- We would like to see more personnel (non-PAOs and Communication experts) undertake this course. It will be held annually at DPALC, since the feedback from candidates was very positive.

From: [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum_LCol_AE@ADM(PA)_DPAPO@Ottawa-Hull)
Sent: November 15, 2019 6:40 AM
To: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead_Maj_DJ@ADM(PA)_DPAPO@Ottawa-Hull); [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen_Maj_D@ADM(PA)_DGPA@Ottawa-Hull)
Cc: [Neron MWO JF@CFTDC Trg Coy@Borden](mailto:Neron_MWO_JF@CFTDC_Trg_Coy@Borden)
Subject: FW: Updated slide deck for your review
Attachments: CDS Ops_19 November_ADM (PA).V2.pptx

Updated PowerPoint that I worked on last night for the BGen.

He liked the initial version I sent, but he wanted it condensed to four slides.

For your info.

-AES

From: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
Sent: November-14-19 7:06 PM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: Updated slide deck for your review

Sir,

Please take a look at the latest version; I have incorporated your comments; the presentation now has a clear focus.

Furthermore, your points if not incorporated within the slides themselves, they have been included in the notes section within the PowerPoint.

Let me know if you need anything else incorporated or changed.

-AES

Advanced Actor and Audience Analysis Training Course (A4TC)

- The first Canadian Advanced Actor and Audience Analysis Training Course (A4TC) was recently held at the Defence Public Affairs Learning Centre (Gatineau / NPB). Graduation occurred on Friday, November 8th and it is important to note that Canada and the Netherlands are the first NATO countries to run this seven-week course.
- Twenty civilian and military (Aviator to Major) candidates from throughout the Defence Community, including ADM (PA)'s newly established Military Strategic Communication Team, ADM (S&T), CJOC, CA, RCN, and CMP successfully completed the course.
- This is another significant move forward as we build a StratCom capability within the CAF. It's only a first step, but we now have 20 trained individuals spread across the country (within the Defence Community) that have the skills to support our overall StratCom efforts.



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Advanced Actor and Audience Analysis Training Course (A4TC)

- The focus of the course was centered on the Behavioral Dynamic Methodology (BDM), which is a scientific approach to conducting effective and measurable STRATCOM, along with influence and behavior change.
- The BDM is partly designed to uncover IF you have a chance to change or influence behaviour. The BDM is not a 'formula' for success, nor can you change every behaviour in every group of people; however if used correctly, it can be an effective STRATCOM enabler to any Mission.

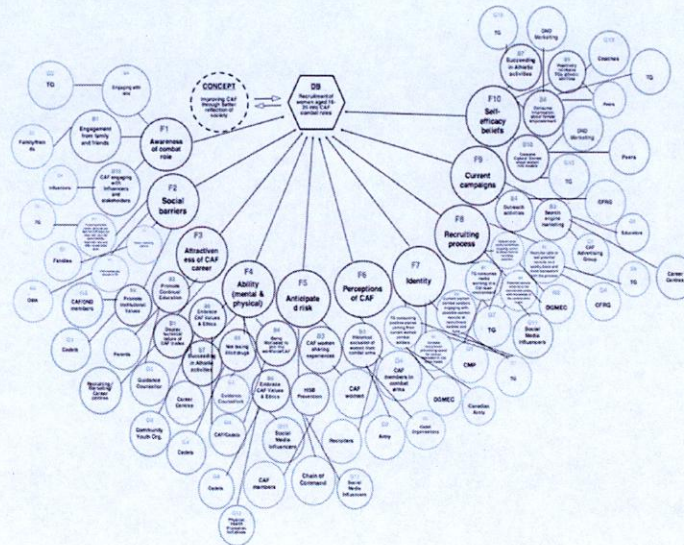
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Advanced Actor and Audience Analysis Training Course (A4TC)

The Behavioral Dynamic Methodology:

Advanced Actor and Audience Analysis Training Course (A4TC)

- As part of the seven-week course, candidates worked closely with the MPG on a live case study: *Recruiting Women into the Combat Arms*.
- The research involved the requirement to produce detailed behavioral profiles, problem space mapping, and included two rounds of Qualitative research, and Quantitative instrument design. The result of the case study was grounded in behavioral science and accurate due to the use of the Behavioral Dynamic Methodology.



s.19(1)

From: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen_BGen_JH@ADM(PA)_DPAPO@Ottawa-Hull)
Sent: November 15, 2019 1:29 PM
To: [Henderson C@ADM\(PA\)_@Ottawa-Hull](mailto:Henderson_C@ADM(PA)_@Ottawa-Hull); [Rinfret MJ@ADM\(PA\)_@Ottawa-Hull](mailto:Rinfret_MJ@ADM(PA)_@Ottawa-Hull)
Cc: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull); [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum_LCol_AE@ADM(PA)_DPAPO@Ottawa-Hull); [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen_Maj_D@ADM(PA)_DGPA@Ottawa-Hull); [Apostoliuk LCol HAB@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Apostoliuk_LCol_HAB@ADM(PA)_DPAPO@Ottawa-Hull); [De Mora J@ADM\(PA\) DGPA@Ottawa-Hull](mailto:De_Mora_J@ADM(PA)_DGPA@Ottawa-Hull)
Subject: Actor Audience Analysis Brief: CDS Ops
Attachments: A4TC_CDS_Ops.pptx; ATT00001.htm

Hi Chris,

We now have a very tight Actor and Audience Analysis brief with a strong narrative that could be used at CDS Ops.

It is attached below. Please advise if you would like any revisions.

Thanks!

Jay

Brigadier-General Jay H. Janzen

Director-General Military Strategic Communication

Assistant Deputy Minister (Public Affairs)

Department of National Defence / Government of Canada

Jay.Janzen@forces.gc.ca / Tel: [613-995-1497](tel:613-995-1497) / Mobile : [613-617-4585](tel:613-617-4585)

Directeur général – communication stratégique militaire

Sous-ministre adjoint (Affaires publiques)

Ministère de la Défense nationale / Gouvernement du Canada

Jay.Janzen@forces.gc.ca / Tél.: [613-995-1497](tel:613-995-1497) / Mobile : [613-617-4585](tel:613-617-4585)

Begin forwarded message:

From: Jay Janzen
Date: November 15, 2019 at 1:13:32 PM EST
To: Jay Janzen <jay.janzen@forces.gc.ca>
Subject: Actor Audience Analysis Brief: CDS Ops

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s.20(1)(c)

Advanced Actor and Audience Analysis Training Course (A4TC)

- Seven-week duration (Sep - Nov 19)
- Delivered by civilian experts
- 20 pers trained from ADM(PA) StratCom team, CJOC, CA, RCN, CMP, ADM(S&T).



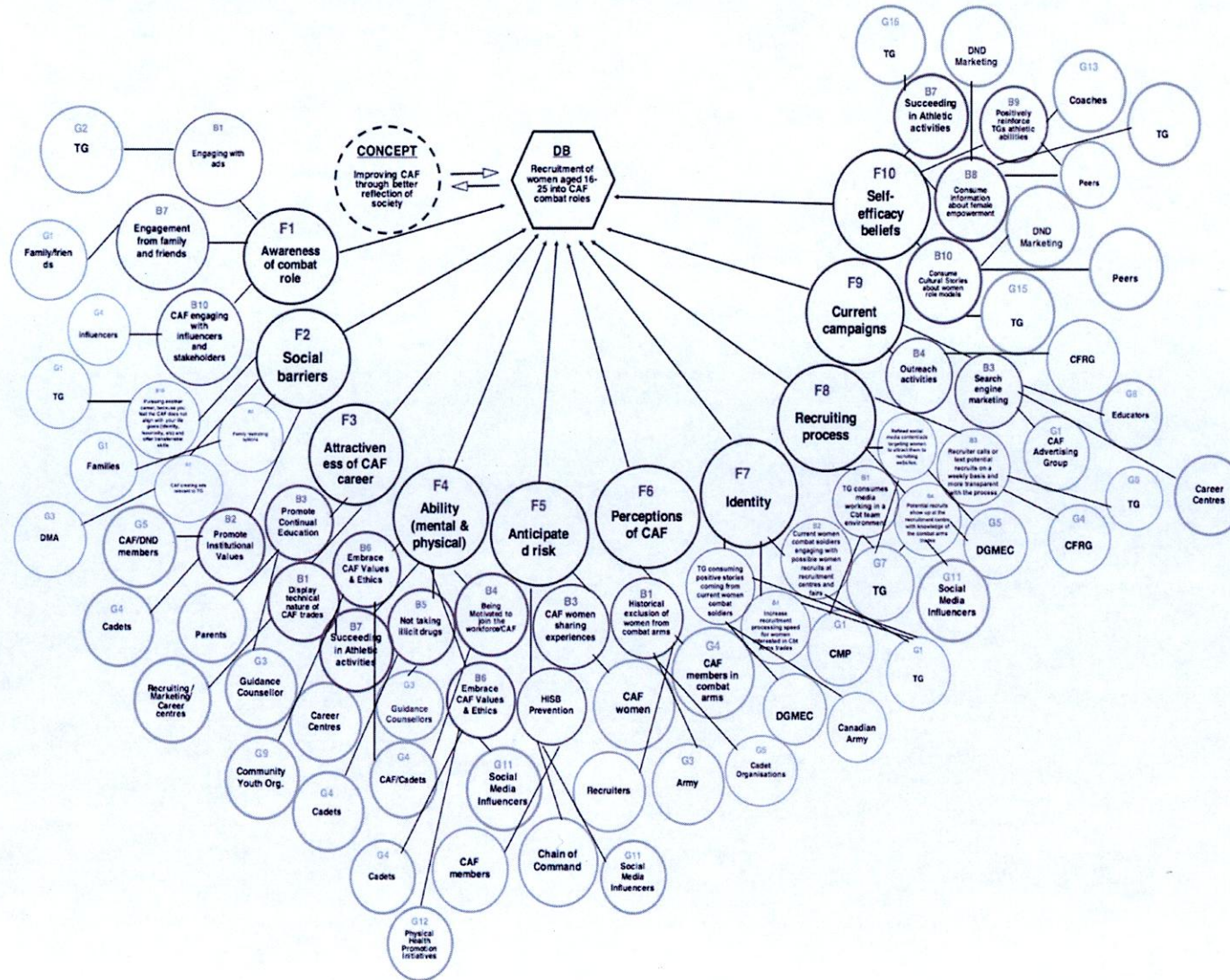
Page 1051

**is withheld pursuant to sections
est retenue en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Case study: *Recruiting Women into the Combat Arms*



From: Hurov LCdr CN@ADM(PA) DGPA@Ottawa-Hull
Sent: November 19, 2019 1:03 PM
To: Keirstead Maj DJ@ADM(PA) DPAPD@Ottawa-Hull; Bowen Maj
D@ADM(PA) DGPA@Ottawa-Hull
Cc: Neron MWO JF@CFTDC Trg Coy@Borden
Subject: Courses AAR - Lt(N) Hurov
Attachments: Mil Strat Comm Courses AAR.DOCX

Majs,

Attached is my AAR points for the courses I have conducted thus far. I realise we are only in the first days of the targeting course, however it is abundantly clear the type of course it is going to be.

Cheers,
Christine

Mil Strat Comm Courses AAR – Lt(N) Hurov

Course: Information Environment Advanced Analysis

Course Goal/Overview: This course provides a framework for analysis that goes beyond DIME and/or PMESII, into link and system analysis. Largely tailored towards INT personnel, it requires an intensive amount of reading (150 pages, up to 3 hours per night), which drives both lectures and the ongoing in-course scenario, on which the practical exercises are based. The course culminates in a briefing to actual senior staff about the scenario, roughly equivalent to a JIPOE/Preparation of the Battle Space briefing. The course is taught by retired US Colonels or equivalent, and is very academic in discussion and expectations. It is well-organized and run, however with an intense tempo.

Main links to Strat Comm/Info Domain: The course treats information as the priority and “kinetic” or heavy metal as supporting to the overall information domain. It also teaches in-depth thinking and analysis that can be used in the practice of our jobs. Having a mix of intelligence, planners and PA on the course facilitated robust discussions, and I was able to see linkages with my anticipated work throughout the course.

Recommendation for future courses: While there were junior NCMs on the serial I attended, they were intelligence analysts somewhat familiar with this way of thinking. I do not recommend that it would be a practical course for our junior members. I do recommend the course for junior officers joining the unit, as an introduction to link and systems analysis, along with the information environment writ-large.

Other: Three members of MSCT attended IEAA immediately preceding IEAA. While the two courses are certainly complementary, it is not recommended to do both back-to-back, as there was no opportunity to absorb and process the first course before embarking on the second.

Course: A4TC

Course Goal/Overview: The Advanced Actor and Audience Analysis Course applies academic theory from various fields including psychology, anthropology and sociology to create a cohesive method for behaviour change. It is taught by experienced practitioners, and reinforced through sound academic theory. The course prioritises using in-depth qualitative and quantitative methods to adopt an emic perspective of an audience, and provides valuable tools to analyse this data, as well as tested behaviour change methods. The course is taught through traditional classroom learning as well as a comprehensive live case study through which the new methods are applied by the students, with guidance and mentorship from the course staff.

Main links to Strat Comm/Info Domain: The entire behaviour dynamics methodology can be used as a whole or pieces and theories can be applied to various problem spheres across the information domain from strict public affairs to deployed behaviour change outcomes alongside and information team. For members of the Information/Cognitive team, this course was seen as a job “how-to” and has provided the basis of our understanding of this domain.

Recommendation for future courses: It is understood that this course will form the basis of our future training. It is not recommended that image techs take the entire course, but a possible shorter version specializing in semiotics could be a good option for their own training. As well, more time on the course needs to be spent on campaign creation and implementation, which were truncated in this first serial.

Other: If DND is to take possession of this course, I recommend it take place in a phased approach with oversight from Emic Consulting for at the very least the first two years. The experience and academic rigour brought to the course their teaching cannot be replaced with inexperienced junior officers.

Course: Joint Staff Targeting

Course Goal/Overview: This course aims to provide a very broad and general introduction to Joint Targeting at the Operational level.

Main links to Strat Comm/Info Domain: This course is largely munitions-based targeting focussed, and overtly acknowledges that the existing framework does not accommodate non-munitions-based targeting in any real way. While it can be seen as another “way of thinking” or framework, the links directly to Strat Comm are tenuous at this level.

Recommendation for future courses: This course is not recommended for Image Techs – it is HQ and Staff oriented, and while having the background knowledge may be practical, it is not worth a full week out of the office. This course is recommended as a lower-priority course for PAOs joining MSCT – while it will provide some framework to be able to interact with a targeting team, I do not assess that it is as useful as IEAA or A4TC.

Other: Nil.

From: [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum.LCol.AE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: November 22, 2019 6:56 AM
To: [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen.Maj.D@ADM(PA).DGPA@Ottawa-Hull)
Cc: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull); [Neron MWO JF@CFTDC Trg Coy@Borden](mailto:Neron.MWO.JF@CFTDC.Trig.Coy@Borden)
Subject: FW: ADM Request from today's PAMC
Attachments: CDS Ops_19 November_ADM (PA).pptx; 4ATC Talking Points_ADM (PA).docx

Dave,

In relation to the task below, attached you have the slide deck I developed for the ADM in support to CDS Ops – at the end, it was turned into a one-pager, but at least you have a start.

I also took all the information to develop a two page talking point cheat sheet.

Use this power point as a starting point and if you want to expand, please go ahead. You can probably use of the information from the actual presentation as well to go into more details, but at least we have a starting point.

-AES

From: [Andrews R@ADM\(PA\)@Ottawa-Hull](mailto:Andrews.R@ADM(PA).Ottawa-Hull)
Sent: November-20-19 12:41 PM
To: [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum.LCol.AE@ADM(PA).DPAPO@Ottawa-Hull) <ANDRE.SALLOUM@forces.gc.ca>
Cc: [Rinfret MJ@ADM\(PA\)@Ottawa-Hull](mailto:Rinfret.MJ@ADM(PA).Ottawa-Hull) <MARIE-JOSEE.RINFRET@forces.gc.ca>; [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen.Maj.D@ADM(PA).DGPA@Ottawa-Hull) <Dave.Bowen@forces.gc.ca>; [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull) <Doug.Keirstead@forces.gc.ca>; [Neron MWO JF@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Neron.MWO.JF@ADM(PA).DGPA@Ottawa-Hull) <Jean-Francois.Neron@forces.gc.ca>; [Grover Cdr DH@ADM\(PA\) DPALC@Ottawa-Hull](mailto:Grover.Cdr.DH@ADM(PA).DPALC@Ottawa-Hull) <DIANE.GROVER@forces.gc.ca>; [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>; [Phillips KA@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Phillips.KA@ADM(PA).DPAPO@Ottawa-Hull) <KRIS.PHILLIPS@forces.gc.ca>; [Parrish L@ADM\(PA\) COS\(PA\)@Ottawa-Hull](mailto:Parrish.L@ADM(PA).COS(PA).Ottawa-Hull) <LAUREN.PARRISH@forces.gc.ca>
Subject: RE: ADM Request from today's PAMC

Andre,

Lauren (cc'd) will coordinate with the Coords to find a date/time/location that would accommodate maximum participation. I am thinking the week of December 9-13 but will let Lauren get back to you with options.

Rhiannon

From: [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum.LCol.AE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: November-20-19 12:18 PM
To: [Andrews R@ADM\(PA\)@Ottawa-Hull](mailto:Andrews.R@ADM(PA).Ottawa-Hull) <RHIANNON.ANDREWS@forces.gc.ca>
Cc: [Rinfret MJ@ADM\(PA\)@Ottawa-Hull](mailto:Rinfret.MJ@ADM(PA).Ottawa-Hull) <MARIE-JOSEE.RINFRET@forces.gc.ca>; [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen.Maj.D@ADM(PA).DGPA@Ottawa-Hull) <Dave.Bowen@forces.gc.ca>; [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull) <Doug.Keirstead@forces.gc.ca>; [Neron MWO JF@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Neron.MWO.JF@ADM(PA).DGPA@Ottawa-Hull) <Jean-Francois.Neron@forces.gc.ca>; [Grover Cdr DH@ADM\(PA\) DPALC@Ottawa-Hull](mailto:Grover.Cdr.DH@ADM(PA).DPALC@Ottawa-Hull) <DIANE.GROVER@forces.gc.ca>; [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)

<DOUGLAS.ALLISON@forces.gc.ca>; Phillips KA@ADM(PA) DPAPO@Ottawa-Hull
<KRIS.PHILLIPS@forces.gc.ca>

Subject: FW: ADM Request from today's PAMC

Rhiannon,

As noted below, we've been tasked to develop an internal presentation to help promote the A4TC course that was recently held at DPALC.

Maj D. Bowen has the lead on behalf of our team; however, it was recommended we work with your Office to organize a 'lunch and learn' type session for personnel within ADM (PA).

With the holiday season fast approaching, we can hold something at either our location (M23), Malone Room (NDHQ), in the Kandahar Room / DPALC (NPB), and of course at Carling Campus, shortly before the majority of us go on holiday leave or in mid-January 2020.

If you can assign a POC within your shop, possibly identify a date and location, we can work with your team to meet the ADM's intent.

If you would like to discuss further, please let me know.

Thank you.

-AES

Lieutenant Colonel / Lieutenant colonel Andre E. Salloum

Military Strategic Communication Team
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces
andre.salloum@forces.gc.ca / Tel: 613-991-9383 / Mobile: 613-325-7620

Équipe de communication stratégique militaire
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes
andre.salloum@forces.gc.ca / Tél: 613-991-9383 / Cellulaire: 613-325-7620

From: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull
Sent: November-19-19 8:25 PM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>
Cc: Phillips KA@ADM(PA) DPAPO@Ottawa-Hull <KRIS.PHILLIPS@forces.gc.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull <Dave.Bowen@forces.gc.ca>
Subject: ADM Request from today's PAMC

Hi Andre,

ADM made the following request at today's PAMC:

1. AAA Course: Seeking Maj Bowen to provide briefs (possibly in concert with a civ attendee from the course) to other groups in ADM, and to a CCO forum/audience. A condensed format was suggested, i.e. 30 mins. Intent is to 1) share the word and build awareness of this training and what it can offer; and 2) to encourage participation in the next serial to be run here in Ottawa. The ADM would like to see more ADM PA pers acquire these skills.

Can you have the team put a short brief together, and then work with COS office to schedule a brief to the wider ADM(PA) community? This will be a warm-up for a subsequent brief to CCO.

Thanks.

Jay

Brigadier-General Jay H. Janzen

Director-Général Military Strategic Communication

Assistant Deputy Minister (Public Affairs)

Department of National Defence / Government of Canada

Jay.Janzen@forces.gc.ca / Tel: 613-995-1497 / Mobile : 613-617-4585

Directeur général – communication stratégique militaire

Sous-ministre adjoint (Affaires publiques)

Ministère de la Défense nationale / Gouvernement du Canada

Jay.Janzen@forces.gc.ca / Tél.: 613-995-1497 / Mobile : 613-617-4585

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Advanced Actor and Audience Analysis Training Course (A4TC)

Main Points:

- I'm pleased to report that the Military StratCom team and the Defence Public Affairs Learning Centre have successfully conducted the first Canadian Advanced Actor and Audience Analysis Training Course. The seven-week-long program was delivered by civilian experts
- Canada and the Netherlands are the first NATO countries to run this seven week course. Twenty civilian and military (Aviator to Major) candidates from throughout the Defence Community, including ADM (PA)'s newly established Military Strategic Communication Team, ADM (S&T), CJOC, CA, RCN, and CMP successfully completed the course.
- The focus of the course was centered on the Behavioral Dynamic Methodology (BDM), which is a scientific approach to conducting effective and measurable STRATCOM, along with influence and behavior change.
- This course represents another significant move forward as we build a StratCom capability within the CAF. We now have 20 folks that come from various background who understand these concepts and can apply them to achieve effects.

Additional Talking Points:

- I have no doubt that this new knowledge will begin to make a difference immediately, if course graduates are empowered to use it. We do need to train more people and institutionalize this capability before wholesale change occurs throughout the CAF. This will take some time, but I am thrilled that we are moving forward in practical ways.
- As part of the seven-week course, candidates worked closely with MilPersCom on a live case study: *Recruiting Women into the Combat Arms*.
- Students were required to produce detailed behavioural profiles and conduct problem space mapping, two rounds of qualitative research, and quantitative instrument design. On the screen, you can see one of the problem space maps that the course developed as part of their curriculum.
- The results of this work have been briefed to members of the Military Personnel Generation Group as well as to my Recruit Advertising Team, who I am told find it valuable to their ongoing efforts.
- The 4ATC was organized in support to the initial phase of the Military Strategic Communication and Public Affairs Operationalization Force Development Plan, which means that ADM (PA) now has an Analysis and Campaign Team, fully trained and ready to support L1s, along with Domestic and Expeditionary operations.

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- This course was also develop to train PAOs to become more operational and to use Target Audience Analysis, along with Etic and Emic methods to solve problems on behave of their respective LIs.
- We would like to see more personnel (non-PAOs and Communication experts) undertake this course. It will be held annually at DPALC, since the feedback from candidates was very positive.

Background:

- This course is world renowned within NATO nations for teaching methods to understand and effect behavior change and influence in support to Operations. As part of the BDM, candidates are taught about Target Audience Analysis (TAA), which is an essential pillar of STRATCOM.
- In essence, the BDM is partly designed to uncover IF you have a chance to change or influence behaviour. The BDM is not a 'formula' for success, nor can you change every behaviour in every group of people; however if used correctly, it can be an effective STRATCOM enabler to any Mission.
- Through a combination of course readings, interactive lectures, live case studies and guided discussions, A4TC candidates were introduced to the intricacies of behavioural science, research methods, influence and ethical behaviour change.
- Candidates also gained extensive knowledge of behavioural profiling and how to conduct actor and audience analysis methodology, campaign planning, methods of evaluation, qualitative and quantitative research design and how to apply the methodology to real life operational scenarios.
-
- BDM is not a 'guarantee' for success, nor can you change every behaviour in every group of people; however if used correctly, it can be an effective STRATCOM enabler to any mission. It is designed to fully integrate within existing military planning processes and targeting cycles.
- Candidates explored concepts that that included emic and etic approaches, semiotics, problem space mapping, behavioural profiling, actor and audience analysis, campaign planning, methods of evaluation, qualitative and quantitative research design and how to apply the methodology to real life operational scenarios.

Assistant Deputy Minister (Public Affairs)

Background Brief on the Advanced Actor and Audience Analysis Training Course (4ATC)

19 November 2019

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Advanced Actor and Audience Analysis Training Course (A4TC)

Who we are:

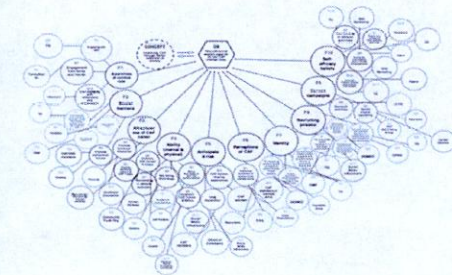
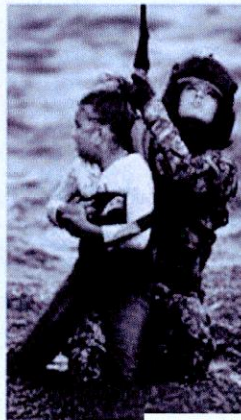
The new modern army

The new wave

Female history is now

A rationale for the evolution of the military. Making a tangible case for why the army **need** tough females on the front line, to neutralise any sense that this is merely a gender equality experiment.

It needs to state the case for tough female combat arms personnel, and extol the benefits of diverse capabilities, mindsets and specific roles that females are uniquely able to fulfil in order to defeat badness and bring peace and liberation to the powerless.



Advanced Actor and Audience Analysis Training Course (A4TC)

- The first Canadian Advanced Actor and Audience Analysis Training Course (4ATC) was recently held at the Defence Public Affairs Learning Centre (Gatineau / NPB). Graduation occurred on Friday, November 8th.
- Canada and the Netherlands are the first NATO countries to run this seven week course. Twenty civilian and military (Aviator to Major) candidates from throughout the Defence Community, including ADM (PA)'s newly established Military Strategic Communication Team, ADM (S&T), CJOC, CA, RCN, and CMP successfully completed the course.
- The seven week course was delivered at the Masters and PhD level and graded on the Oxford University Scale.
- Four candidates graduated with Distinction, bringing the total number of Canadians that have graduated with the "Distinguished Designation" to six.

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Advanced Actor and Audience Analysis Training Course (A4TC)

- The focus of the course was centered on the Behavioral Dynamic Methodology (BDM), which is a scientific approach to conducting effective and measurable STRATCOM, along with influence and behavior change.
- The BDM was developed by EMIC Consulting and
- This course is world renowned within NATO nations for teaching methods to understand and effect behavior change and influence in support to Operations. As part of the BDM, candidates are taught about Target Audience Analysis (TAA), which is an essential pillar of STRATCOM.
- In essence, the BDM is partly designed to uncover IF you have a chance to change or influence behaviour. The BDM is not a 'formula' for success, nor can you change every behaviour in every group of people; however if used correctly, it can be an effective STRATCOM enabler to any Mission.

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s.20(1)(c)

Advanced Actor and Audience Analysis Training Course (A4TC)

The Behavioral Dynamic Methodology:

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Advanced Actor and Audience Analysis Training Course (A4TC)

The Behavioral Dynamic Methodology:

Advanced Actor and Audience Analysis Training Course (A4TC)

- Through a combination of course readings, interactive lectures, live case studies and guided discussions, A4TC candidates were introduced to the intricacies of behavioural science, research methods, influence and ethical behaviour change.
- Candidates also gained extensive knowledge of behavioural profiling and how to conduct actor and audience analysis methodology, campaign planning, methods of evaluation, qualitative and quantitative research design and how to apply the methodology to real life operational scenarios.
- As part of the seven week course, candidates worked closely with the MPG on a live case study: *Recruiting Women into the Combat Arms*.
- The research involved the requirement to produce detailed behavioral profiles, problem space mapping, and included two rounds of Qualitative research, and Quantitative instrument design. The final result of the case study was grounded in behavioral science and accurate due to the use of the Behavioral Dynamic Methodology.

Advanced Actor and Audience Analysis Training Course (A4TC)

Key Take Aways

- Candidates were taught that there is a requirement to spend more time thinking about the problem space and the problem through brainstorming and researching at the front-end. The solution will come; however, the problem needs to be thoroughly studied and understood.
- The 4ATC was organized in support to the initial phase of the Military Strategic Communication and Public Affairs Operationalization Force Development Plan, which means that ADM (PA) now has an Analysis and Campaign Team, fully trained and ready to support L1s, along with Domestic and Expeditionary operations.
- This course was also develop to train PAOs to become more operational and to use Target Audience Analysis, along with Etic and Emic methods to solve problems on behave of their respective L1s.
- We would like to see more personnel (non-PAOs and Communication experts) undertake this course. It will be held annually at DPALC, since the feedback from candidates was very positive.

From: [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum.LCol.AE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: November 25, 2019 11:07 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Cc: [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen.Maj.D@ADM(PA).DGPA@Ottawa-Hull); [Phillips KA@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Phillips.KA@ADM(PA).DPAPO@Ottawa-Hull); [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: AAA/BDM Brief to Op GEN Tgting Cell

Doug,

Your thoughts on this RFI? It might be in line with what the ADM (PA) and BGen Janzen wanted as well. Ensure CMP was tracking the output / results from the 4ATC.

-AES

From: Godin LCol SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: November-25-19 10:45 AM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>
Subject: FW: AAA/BDM Brief to Op GEN Tgting Cell

André,

As per below, CMPC has tasked us to provide a briefing to COS Strat and the Op Gen cell.

While Travis and Olivier can provide the briefing, I wanted to offer you the first rights of refusal.

Let me know what you think,

Steph

LCol Stéphanie Godin

Head, Military Strategic Communications – Personnel and Legal Services
Canadian Armed Forces
stephanie.godin@forces.gc.ca / Tel : 613-901-8812 / BB: 613-790-2735

Chef des affaires publiques - Communications stratégiques militaires - Personnel et services
juridiques
Ministère de la Défense nationale / Gouvernement du Canada

stephanie.godin@forces.gc.ca / Tél. : 613-901-8812 / BB: 613-790-2735

From: Smyth Maj TA@ADM(PA) DPAPO@Ottawa-Hull
Sent: November 25, 2019 8:39 AM
To: Godin LCol SMM@ADM(PA) DPAPO@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>
Subject: AAA/BDM Brief to Op GEN Tgting Cell

Ma'am,

FYSA - In discussion with CMPC re: the AAA crse live case study, he has tasked me to provide the Op GENERATION tgting cell with a brief on the behavior dynamics methodology that was

instructed, and how his tgting team could possibly apply it for their own purposes. MGen Gagne was present, and concurred this should happen soon.

Maj Gallant (as a crse mate and someone very famil with MPC/CMP priorities) has offered to co-present with me as it is a significant amount of content. I have also raised with Maj Bowen as a discussion point (Stratcom Gp) for input and would also need to reach out to Marketing and Advertising. There remain some question marks at the end of this brief re: way fwd, and I would need to ensure that we have the capability / desire to see additional research through to achieve a desired effect as defined by the tgting.

TS

Major T.A. Smyth

Chief of Operations
Military Strategic Communications – Personnel and Legal Services
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces
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Chef, opérations
Communications stratégiques militaires – Personnel et services juridiques
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes
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From: [Croizer Capt AD@CJOC HQ@Ottawa-Hull](mailto:Croizer_Capt_AD@CJOC_HQ@Ottawa-Hull)
Sent: December 13, 2019 12:35 PM
To: [Waldman SM@ADM\(S&T\) DRDC CORA@Ottawa-Hull](mailto:Waldman_SM@ADM(S&T)_DRDC_CORA@Ottawa-Hull); [Salloum LCol AE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Salloum_LCol_AE@ADM(PA)_DPAPO@Ottawa-Hull)
Cc: [Bowen Maj D@ADM\(PA\) DGPA@Ottawa-Hull](mailto:Bowen_Maj_D@ADM(PA)_DGPA@Ottawa-Hull); [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead_Maj_DJ@ADM(PA)_DPAPO@Ottawa-Hull); [Neron MWO JF@CFTDC Trg Coy@Borden](mailto:Neron_MWO_JF@CFTDC_Trg_Coy@Borden)
Subject: 4ATC Overview Presentation
Attachments: 4ATC 2019 Overview.pptx

Good afternoon Sir,

As per your initial request, I built a draft presentation of a brief overview of the 4ATC with a focus on the TAA of the BDM and a short part on the live case study. If you could provide feedback on it, I can rework it as required next week (I'm in office until 22 Dec) to make it fit your requirements better. I am currently missing some notes on the slides and the "Operational Relevance" content as I am waiting for feedback from our course staff on this. I will include it and can resend a more updated version early next week.

Thank you,

Captain | Capitaine Alexia Croizer

Public Affairs Officer, Exped, CJOC
Canadian Armed Forces
Alexia.Croizer@forces.gc.ca / Tel: 613-945-2320

Officier des affaires publiques, Exped, COIC
Forces armées canadiennes
Alexia.Croizer@forces.gc.ca / tél: 613-945-2320

From: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull
Sent: December 5, 2019 9:46 AM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>
Cc: Croizer Capt AD@CJOC HQ@Ottawa-Hull <Alexia.Croizer@forces.gc.ca>
Subject: RE: Power Point

Hi LtCol Salloum,

Captain Alexia Crozier has very kindly agreed to modify the presentation she made on the BDM for personnel within ADM (PA) to reflect your preferences of it being a:

- half hour presentation
- 20-30 slides
- primarily on Audience Analysis and BDM
- with a short portion on the recruiting project done by the trainees.

She says she can do it by December 13th, and I will support her as necessary.

I will also send her the information that you would like to have integrated, where possible.

She might have additional questions, so I am CC-ing her.

Thank you to you both!

Cheers,
Suzy

Suzanne Waldman, PhD

Research Analyst | Joint Targeting
Defence Research and Development Canada / Government of Canada
Suzanne.Waldman@forces.gc.ca / Tel: 613-901-7364

Analyste de recherche | Ciblage interarmées
Recherche et développement pour la défense Canada / Gouvernement du Canada
Suzanne.Waldman@forces.gc.ca / Tél.: 613-901-7364

DRDC is an agency of the Department of National Defence / RDDC est une agence du ministère de la
Défense nationale

From: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-05-19 8:49 AM
To: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull <SUZANNE.WALDMAN@forces.gc.ca>
Subject: RE: Power Point

Is Friday, December 13th, feasible?

And I believe 20 slides should be fine.

Thank you.

-AES

From: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull
Sent: December-05-19 8:23 AM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>
Subject: RE: Power Point

Hi Lt Col. Salloum,

What is the deadline on this?

And what would you like for that time? Do you just need a presentation of say 20 slides?

Cheers,
Suzy

From: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-05-19 8:21 AM

To: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull <SUZANNE.WALDMAN@forces.gc.ca>
Subject: RE: Power Point

Suzy,

Thank you so much and no issues at all if you want to get in touch with Capt Croizer.

-AES

From: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull
Sent: December-05-19 8:19 AM
To: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>
Cc: Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull <Dave.Bowen@forces.gc.ca>; Keirstead Maj DJ@ADM(PA) DPAPO@Ottawa-Hull <Doug.Keirstead@forces.gc.ca>; Neron MWO JF@ADM(PA) DGPA@Ottawa-Hull <Jean-Francois.Neron@forces.gc.ca>
Subject: RE: Power Point

Dear Lt Col. Salloum,

That shouldn't be a problem.

Indeed, one of the other participants, Alexia Croizer, who is a PAO at CJOC, has already developed a presentation to this effect that is based on the one we gave to the group at the end of the course. Her aim was for it to be used to deliver information about the course to other PAOs.

I can get in touch with her as to whether I can draw on it for your purposes, if that is all right.

Cheers,
Suzy

From: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-05-19 7:01 AM
To: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull <SUZANNE.WALDMAN@forces.gc.ca>
Cc: Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull <Dave.Bowen@forces.gc.ca>; Keirstead Maj DJ@ADM(PA) DPAPO@Ottawa-Hull <Doug.Keirstead@forces.gc.ca>; Neron MWO JF@ADM(PA) DGPA@Ottawa-Hull <Jean-Francois.Neron@forces.gc.ca>
Subject: Power Point

Suzy,

During our discussion, you mentioned that you might be able to provide some assistance with the development of power points / slide decks.

We have been asked to put together a presentation aimed at personnel within ADM (PA), so an internal brief that highlights the 4ATC and summarizes what the project your classmates worked on entailed.

I don't have the final power point that was presented on 8 November (final day of the course), but I did put together a short slide deck to support a request by the ADM (Mr. Chris Henderson), along with talking points (both are attached).

The overall goal is to host a brief PD session early in January (lunch time presentation) that Maj Bowen and possibly one other course graduate could host in either Gatineau, Ottawa or at Carling Campus.

The format is simple, a 30 minute brief followed by 15 minutes of Q&A. I would like the emphasis of the presentation to be on Audience Analysis and BDM and a short portion on the project itself – recruiting.

Furthermore, the intent is to also use this presentation to brief Snr Communications personnel at an annual Government of Canada Communications Conference held each year, here in Ottawa.

I am also tracking that Maj Travis Smyth recently gave a presentation to his chain of command, I don't have his slide deck, but his presentation could be of use.

Please let me know if you can support.

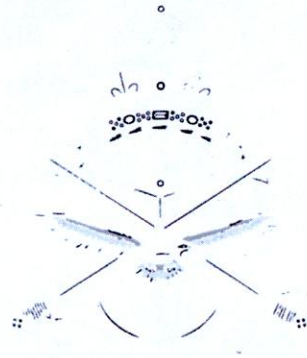
Thank you for your time.

-AES

Lieutenant Colonel / Lieutenant colonel Andre E. Salloum

Commanding Officer, Military Strategic Communication Team
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces
andre.salloum@forces.gc.ca / Tel: 613-991-9383 / Mobile: 613-325-7620

Commandant, Équipe de communication stratégique militaire
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes
andre.salloum@forces.gc.ca / Tél: 613-991-9383 / Cellulaire: 613-325-7620



ADVANCED ACTOR AND AUDIENCE ANALYSIS TRAINING COURSE (4ATC)

2019 COURSE OVERVIEW

OVERVIEW



- ▶ THE ADVANCED ACTOR AND AUDIENCE ANALYSIS TRAINING COURSE
- ▶ WHAT IS BDM?
 - ▶ THE AIM
 - ▶ THE CYCLE
 - ▶ THE ETIC AND EMIC PERSPECTIVES
- ▶ AUDIENCE ANALYSIS
 - ▶ EXPLORE THE PROBLEM – PSM
 - ▶ SELECT THE AUDIENCE – GROUP-BEHAVIOUR PAIRS
 - ▶ CONDUCT RESEARCH – QUAL/QUANT
 - ▶ APPLY PARAMETERS – AUDIENCE PROFILE
- ▶ CAMPAIGN INTERVENTION PLANNING – DOING THE RIGHT THING, AND DO IT RIGHT
- ▶ APPLY, EVALUATE, LEARN, REPEAT
- ▶ LIVE CASE STUDY: RECRUITING WOMEN INTO THE COMBAT ARMS
- ▶ OPERATIONAL RELEVANCE OF BDM

ADVANCED ACTOR AND AUDIENCE ANALYSIS



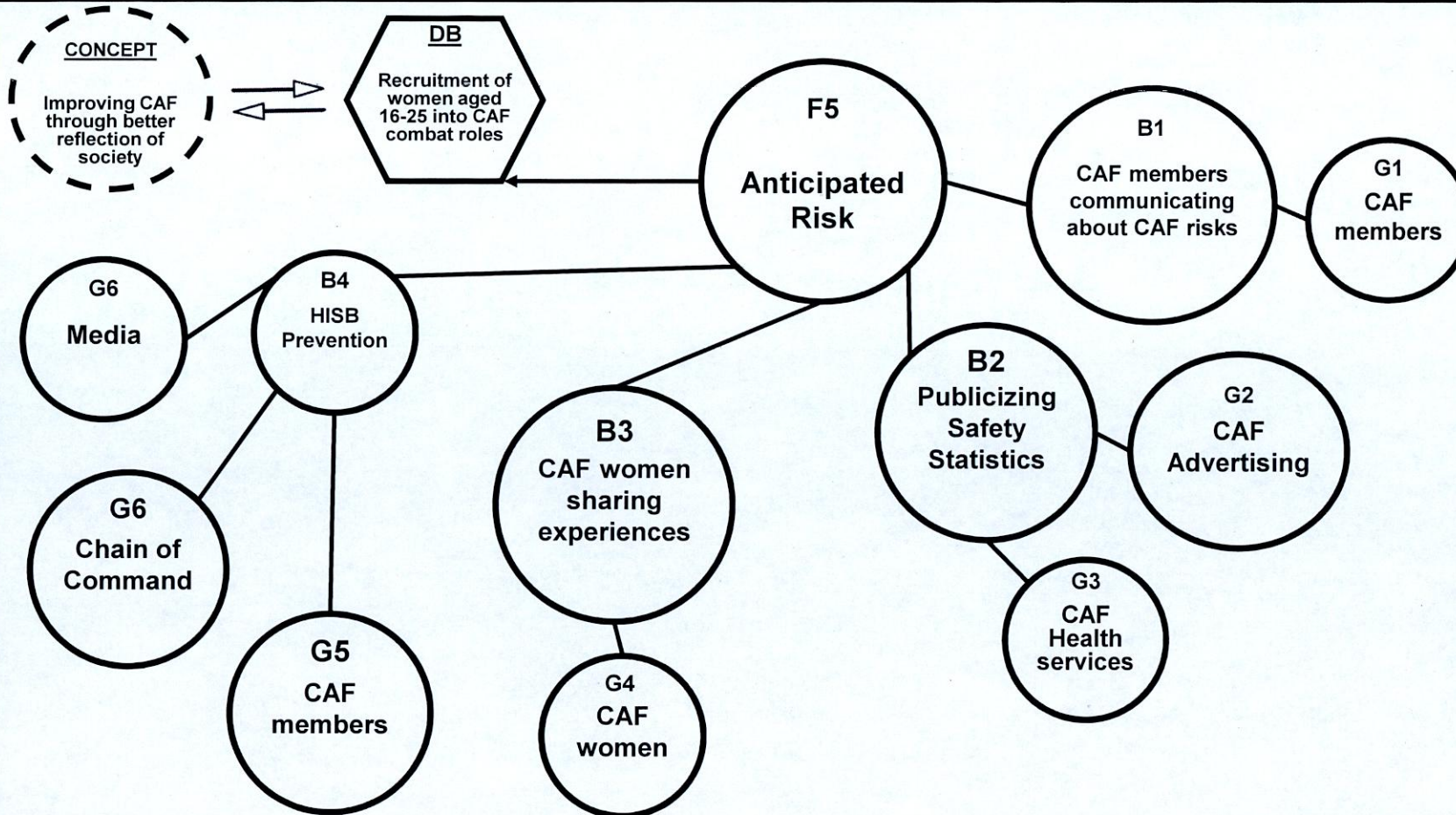
The Course	The Methodology	The Tools
<ul style="list-style-type: none">▶ 7 weeks – 240 hours▶ 20 candidates▶ Aviator to Major▶ From various DND/CAF levels▶ Developed by EMIC Consulting▶ Used by defense forces around the world	<ul style="list-style-type: none">▶ Behavioural Dynamics Methodology (BDM)▶ 5-phase cycle▶ Strategic communication campaign planning and audience analysis▶ Grounded in behavioural science and extensive research	<ul style="list-style-type: none">▶ Problem space mapping▶ Etic/Emic perspectives▶ Qualitative research▶ Quantitative Research▶ Semiotics▶ 44 Parameters

**Pages 1078 to / à 1080
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

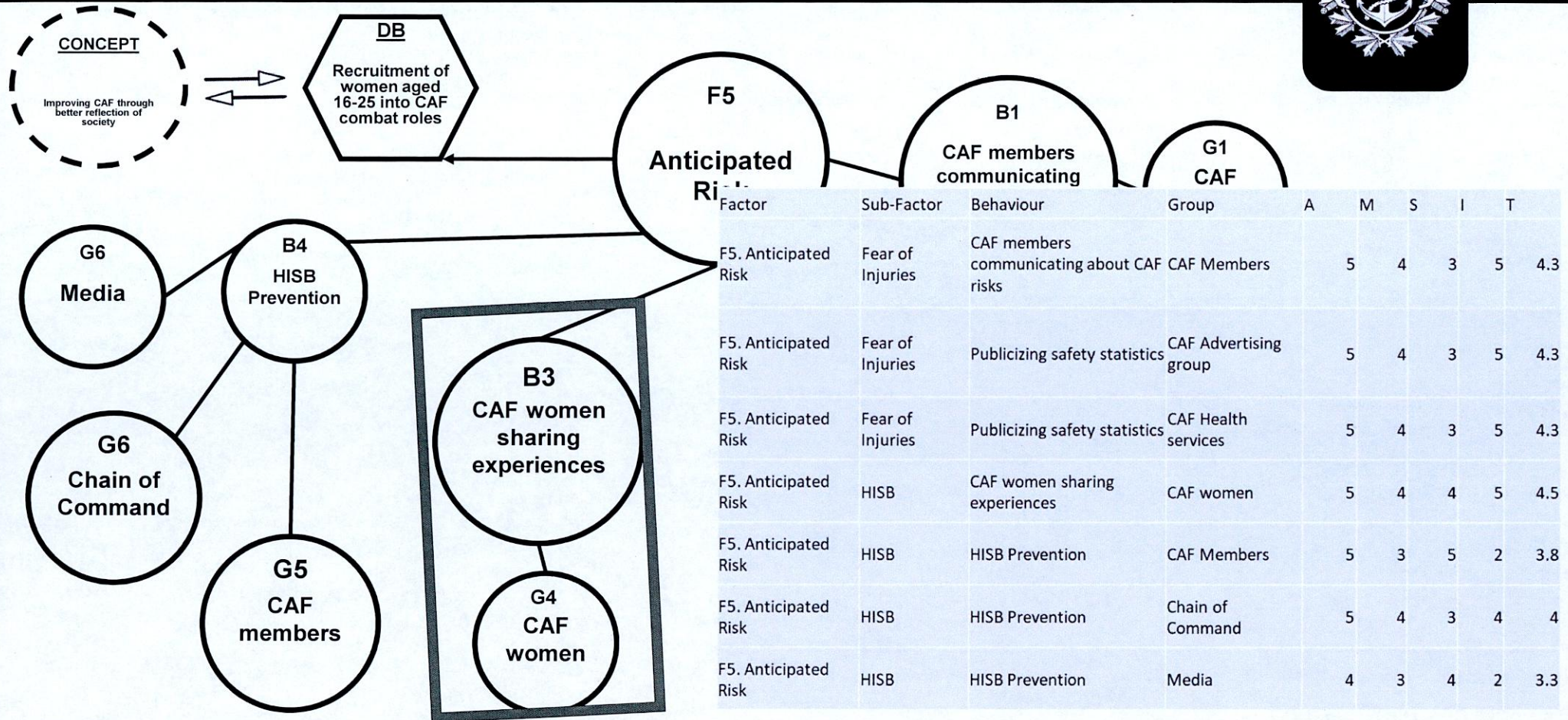
**of the Access to Information Act
de la Loi sur l'accès à l'information**

AUDIENCE ANALYSIS – PROBLEM SPACE MAP





AUDIENCE ANALYSIS - SHORTLISTING



**Pages 1083 to / à 1086
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

IMPLEMENT – EVALUATE – LEARN - REPEAT



▶ **Implement**

- ▶ Roll out the campaign and monitor progress

▶ **Evaluate**

- ▶ Use measures of Performance (MOP) and measures of effectiveness (MOE) to evaluate. Compare with baseline taken during TAA

▶ **Learn**

- ▶ Was the campaign a success? Lessons learned and campaign reports

▶ **Repeat**

- ▶ Start a new BDM cycle to build up from the previous one

OPERATIONAL RELEVANCE



LIVE CASE STUDY - OBJECTIVE



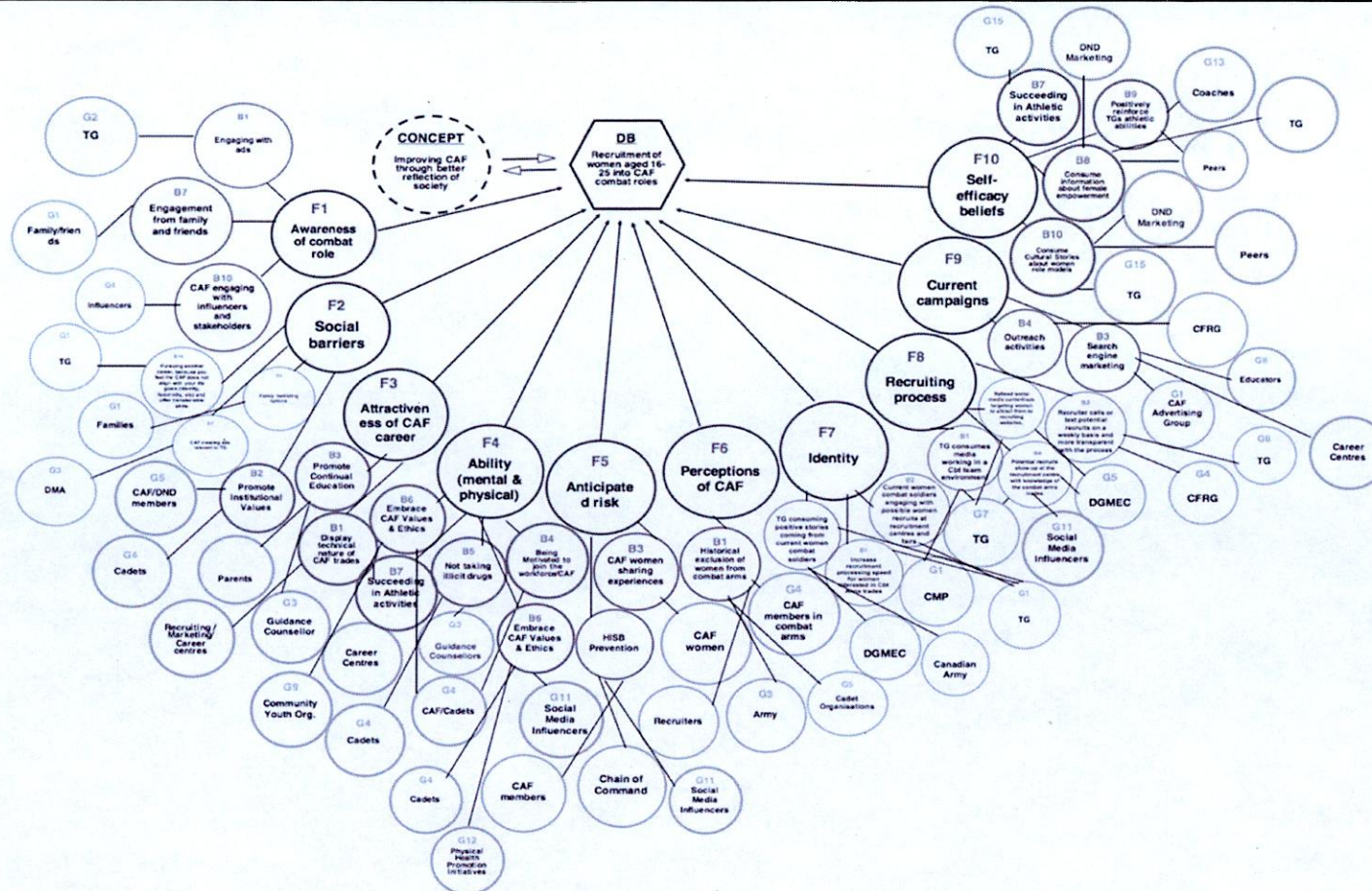
Objective:

Recruitment of women, aged 16 - 25 years old, into the combat arms

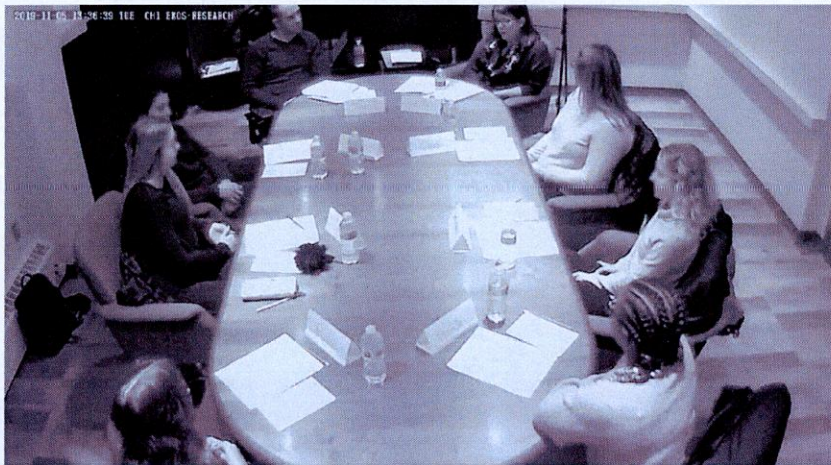
- ▶ SSE objective of 25% women in CAF by 2025
- ▶ Combat arms is where the “space” is for recruiting
- ▶ Age group in highschool or early in their career path decisions
- ▶ Generally more physically fit than other age groups



LIVE CASE STUDY – PROBLEM SPACE MAP



LIVE CASE STUDY – RESEARCH FINDINGS



- ▶ Desk-based Research
- ▶ 22 In-depth interviews
- ▶ 1 Focus group
- ▶ Interview Design
- ▶ 3 weeks of coding and data analysis
- ▶ Survey design

Findings

Lack of Awareness

Opposing Identities

...It's just not for them.

Interview #	Page #	Order	Quote (Quote precisely and use tags and periods for full sentences, or ellipses for mid-sentences)	MAIN FACTOR	SECONDARY FACTOR (can be multiple)	PRIMARY PARAMETER	SECONDARY	TERTIARY	Additional Explanation and Comments	Theme List	Other Themes
			Even if you did, we still on to the five brands the a lot of teenagers would love that. Like if you some type of the thing design and if you having it has that kind of making it more teenager then please, yeah.						USE THIS QUOTE EXACTLY TO RESEARCHER SOMETHING ABOUT TO HAVE THE HAVE TO BE CAREFUL WITH THIS BRAND, I THOUGHT THE RESEARCHER SEEMS TO BE "HAPPY" BECAUSE SHE KNOWS IN THE END OF		
1	1	1	My only issue there for my idea about what I can't really use the design because the primary, so there's no one responsible for my idea, it's just not really done.								
1	1	2	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	3	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	4	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	5	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	6	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	7	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	8	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	9	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	10	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	11	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	12	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	13	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	14	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	15	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	16	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	17	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	18	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	19	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	20	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	21	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	22	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	23	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	24	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	25	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	26	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	27	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	28	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	29	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	30	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	31	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	32	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	33	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	34	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	35	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	36	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	37	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	38	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	39	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								
1	1	40	The problem is a choice. The designer has a way of making it, so they want to make it, and I don't want to make it. I want to make it, and I don't want to make it. I want to make it, and I don't want to make it.								

LIVE CASE STUDY – AUDIENCE PROFILE



- ▶ Social media – Instagram and Youtube – fake but entertaining
- ▶ Highly values opinions of friends and family
- ▶ doesn't like the idea of using force
- ▶ as a woman, she would have to work harder than men if she was in the CAF
- ▶ Military life not compatible with her desired lifestyle
- ▶ Does not have a strong idea of what she wants to do
- ▶ she wants to make a difference, be challenged, and do what she loves
- ▶ hopes to do something that contributes to the "Greater Good" in a predictable workplace where men and women are treated equally



LIVE CASE STUDY - RECOMMENDATIONS



Recommendations for interventions based on the audience profile

- ▶ Social approval: Reframing the narrative associated with a CAF career through other groups who have an influence on the career choice of the target audience (parents, teachers)
- ▶ Modeling. Future campaigns should include examples/models of women in the combat arms trades. Any campaign should adopt an emic perspective/ it is a matter of explaining the military lifestyle using the context and cultural narrative of the target audience.
- ▶ Environmental Restructuring: This is prompting in the cognitive domain that is passive, but nevertheless influences the TA. In our case study, this could be as simple as removing the STOP Sign that is posted on recruiting centres' doors.

Recommendations for future research

- ▶ Build an audience profile of women already in combat arms
- ▶ Conduct deeper Qual/Quant research
- ▶ Explore other audiences with BDM

KEY TAKE AWAYS



Key Take Aways

Candidates were taught that there is a requirement to spend more time thinking about the problem space and the problem through brainstorming and researching at the front-end. The solution will come; however, the problem needs to be thoroughly studied and understood.

The 4ATC was organized in support to the initial phase of the Military Strategic Communication and Public Affairs Operationalization Force Development Plan, which means that ADM (PA) now has an Analysis and Campaign Team, fully trained and ready to support L1s, along with Domestic and Expeditionary operations.

This course was also develop to train PAOs to become more operational and to use Target Audience Analysis, along with Etic and Emic methods to solve problems on behave of their respective L1s.

We would like to see more personnel (non-PAOs and Communication experts) undertake this course. It will be held annually at DPALC, since the feedback from candidates was very positive.

From: [Sally_S@ADM\(Mat\)_D_Svcs_C@Ottawa-Hull](mailto:Sally_S@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: December 16, 2019 2:28 PM
To: [Allison_LCol_DE@ADM\(PA\)_DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull)
Cc: [DeRito_J@ADM\(Mat\)_D_Svcs_C@Ottawa-Hull](mailto:DeRito_J@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Subject: FW: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison,

I am contacting you with regarding the W6369-19-X033/A Target Audience Training contract. As the end date is fast approaching (January 31st, 2020), please let us know if a follow-on contract and/or contract extension is required. I will be leaving the DND as of January 3rd, however, you may contact Johanne De Rito (CC'd) for assistance following this date. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally_S@ADM(Mat)_D_Svcs_C@Ottawa-Hull
Sent: December 5, 2019 12:34 PM
To: Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison.

Contract W6369-19-X033/A ends 31 Jan 2020. I just wanted to check and make sure that everything is on track for ending the contract at the end of January. Please confirm and let me know if an extension is required. Thanks very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs C
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

s.19(1)

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October 25, 2019 10:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Thank you very much Lieutenant Colonel Allison. I'll let her know.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: October 25, 2019 9:48 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>; Kapp R
(Contractor)@ADM(PA) DGPASP@Ottawa-Hull <ROSANGELA.KAPP@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Hi Sharon, sorry I did not get back to you sooner.

I believe that we will need copies of all of the invoices for auditing purposes, so will have to submit them.

The invoices should be paid in Cdn funds

Rosangela Kapp, cc'ed here, can help with the payment issue.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-22-19 4:41 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Good afternoon Lieutenant Colonel Allison,

the Contractor's Representative for contract W6369-19-X033/A has a couple of questions regarding the submission of invoices.

- 1) She mentions that, as stated in the contract, each invoice must be supported by "a copy of the invoices, receipts, vouchers for all direct expenses". She noted that she has many,

- many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. She'd like to know if they all have to be sent.
- 2) She would like to know if the invoice should list the total payable in Euros or in Canadian Funds.

If you like, you could provide me with the contact information for the person paying the invoices and I will sort this out with him or her. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 26, 2019 2:02 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: RE: W6369-19-X033/A - TAA

Holly,

Thank you so much for all of your assistance on this file. I couldn't have done it without your tremendous support.

Best of luck with your next endeavours.

Sharon,

Welcome aboard

Cheers.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-26-19 1:58 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: W6369-19-X033/A - TAA

Hello LCol Allison,

I just want to inform you that I will be leaving DND at the end of this week. I have just handed over this contract to my colleague, Sharon Sally. Moving forward, if you have any questions or concerns about this file, please contact Sharon.

It has been wonderful to work with you.

Kind Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca/ Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada
Holly.brousseau@forces.gc.ca/ Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January 7, 2020 8:18 AM
To:
Subject: Re: Happy New year

Hi please subtract it from the final invoice. We will re-allocate internally.

,cheers

Sent from my BlackBerry 10 smartphone on the Bell network.

From:
Sent: Tuesday, January 7, 2020 6:28 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Re: Happy New year

Dear LCol Allison,

Happy new year!

I am ready to submit the invoices, except I don't know what to do about the portion of the project for quantitative research; do I subtract this from the final invoice? Or would you like to reallocate this?

Kind regards,

www.emicconsulting.co.uk

emic Consulting

On 6 Jan 2020, at 18:36, DOUGLAS.ALLISON@forces.gc.ca wrote:

Hi

Hope you had a great holiday season.

I am wondering when you intend to submit invoices and receipts for the AAA course. We cannot process any payments until we have those to enter into our financial system.

A0447854_1-001099

Hope you have a great New Year.

Cheers

Doug

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général –
communication stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense
nationale et Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 /

CSN/RCCC : 944-3291

s.19(1)

From:
Sent: January 16, 2020 6:00 PM
To: [Kapp_R@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Kapp_R@ADM(PA) DPAPO@Ottawa-Hull); [Allison_LCol_DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA) DPAPO@Ottawa-Hull)
Subject: Re: W6369-19-X033/A - Invoices
Attachments: EMIC Invoice 00021 Project CAD1907C.pdf

Dear Rosangela and LCol Allison,

I hope you are well!

The final course report has been completed after we have provided the trainees with the opportunity to provide feedback, and it is being sent out today. LCol Allison; please do inform me if you have received everything else in good order (the exam details were submitted as well as trainee feedback and of course you will be included in the email containing the report).

Rosangela, in consultation with LCol Allison I will reduce the final invoice by the amount specified in the contract for quantitative research (CAD 66.250), because we were not able to conduct this research during the election period given it would be classified as opinion research.

I am still awaiting a few direct receipts (such as the methodology licensing fee) however I now have the vast majority of receipts (some contractors did not send final invoices until last month) and I will submit these to you along with the second and third invoice.

The first invoice is exempt from receipts I believe since it stipulates "within the 1st month of the contract" - i.e. before the course (though the contract does state a release document is required - which we were notified is not needed, so I believe for this first installment an invoice is all that is required - please do let me know if that is an incorrect assumption on my part).

You mentioned the invoice could be in any currency; hence XE was used to convert to GBP - however if you use another exchange rate service as standard in Canada, of course please let me know.

Would you please check if the attached invoice is therefore acceptable? If so I will use the same exchange rate for the remaining two.

With many thanks and kind regards,

s.19(1)

www.emicconsulting.co.uk



On 30 Oct 2019, at 13:43, ROSANGELA.KAPP@forces.gc.ca wrote:

Hello

As discussed, please send me the invoices/receipts in a memory stick.
The invoices can be in any currency, just specify the currency on the invoice and we will process payment asap.
Thank you,
Rosangela

From:
Sent: October-28-19 4:09 PM
To: Kapp R (Contractor)@ADM(PA) DGPASP@Ottawa-Hull
<ROSANGELA.KAPP@forces.gc.ca>
Subject: Re: W6369-19-X033/A - Invoices

Hi Rosangela,

Yes I am still in Ottawa.

I can save the current receipts on a memory stick, and there will be more to come as many invoices are paid later / after delivery; I guess I can email those ones with the final invoice then?

There are three invoices and two are overdue now, but I wanted to make sure I get them right hence my questions. I hope they won't take long to pay once I submit them?

Thank you for your help,

Best wishes,

<image001.jpg>

s.19(1)

On 28 Oct 2019, at 16:01, <ROSANGELA.KAPP@forces.gc.ca>
<ROSANGELA.KAPP@forces.gc.ca> wrote:

Hello

I believe you are still in Ottawa right? If so, would it be possible for you to have the files saved into a memory stick and sent to me.

We have internal mail from NPB to HQ. Dave Bowen can help you with that.

The entire course payment is being divided? How many invoices?

I will get back to you regarding the invoice currency tomorrow. I just need to double check something before confirming.

Do not hesitate to contact me should you have any questions.

Thank you,

Rosangela

[613-992-4539](tel:613-992-4539)

From:

Sent: October-25-19 2:20 PM

To: Kapp R (Contractor)@ADM(PA) DGPASP@Ottawa-Hull

<ROSANGELA.KAPP@forces.gc.ca>

Cc: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull

<SHARON.SALLY@forces.gc.ca>

Subject: Fwd: W6369-19-X033/A - Invoices

Dear Rosangela,

Sharon Sally has provided me with your contact details for a few questions regarding contract W6369-19-X033/A - the submission of invoices.

1) As stated in the contract, each invoice must be supported by “a copy of the invoices, receipts, vouchers for all direct expenses”. I have many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. How would you like these to be submitted please? The files are scans so they are too big for email. May I upload them to an online storage and send you a link?

2) My business is UK based as stated in the contract - and as such my business account is in GBP, and I also have a Euro account. I can invoice you in CAD, however the bank will convert to GBP just so you are aware - i.e. the bank details on the invoice will be for a UK GBP bank account. When doing work for other governments sometimes they prefer to provide me with an exchange amount and pay directly in GBP, or EURO so I just wanted to check this point with you.

Thank you in advance for your help,

<image001.jpg>

s.19(1)

Begin forwarded message:

From: <SHARON.SALLY@forces.gc.ca>
Subject: FW: W6369-19-X033/A - Invoices
Date: 25 October 2019 at 10:04:37 GMT-4
To: <

Hi

LCol Allison has responded to the questions below.

He has listed Rosangela Kapp as the person who will be paying the invoices. It would likely be most expedient for you to contact her directly for further enquiries concerning invoices.

ROSANGELA.KAPP@forces.gc.ca

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : [819-939-8990](tel:819-939-8990)

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: [819-939-8990](tel:819-939-8990)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: October 25, 2019 9:48 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
<SHARON.SALLY@forces.gc.ca>; Kapp R (Contractor)@ADM(PA) DGPASP@Ottawa-Hull
<ROSANGELA.KAPP@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Hi Sharon, sorry I did not get back to you sooner.

I believe that we will need copies of all of the invoices for auditing purposes, so will have to submit them.

The invoices should be paid in Cdn funds

Rosangela Kapp, cc'ed here, can help with the payment issue.

s.19(1)

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-22-19 4:41 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
<DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Good afternoon Lieutenant Colonel Allison,

the Contractor's Representative for contract W6369-19-X033/A has a couple of questions regarding the submission of invoices.

- 1) She mentions that, as stated in the contract, each invoice must be supported by "a copy of the invoices, receipts, vouchers for all direct expenses". She noted that she has many, many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. She'd like to know if they all have to be sent.
- 2) She would like to know if the invoice should list the total payable in Euros or in Canadian Funds.

If you like, you could provide me with the contact information for the person paying the invoices and I will sort this out with him or her. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 26, 2019 2:02 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
<HOLLY.BROUSSEAU@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull

<SHANNON.WINTLE@forces.gc.ca>

Subject: RE: W6369-19-X033/A - TAA

Holly,

Thank you so much for all of your assistance on this file. I couldn't have done it without your tremendous support.

Best of luck with your next endeavours.

Sharon,

Welcome aboard

Cheers.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-26-19 1:58 PM
To: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull
<DOUGLAS.ALLISON@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: W6369-19-X033/A - TAA

Hello LCol Allison,

I just want to inform you that I will be leaving DND at the end of this week. I have just handed over this contract to my colleague, Sharon Sally. Moving forward, if you have any questions or concerns about this file, please contact Sharon.

It has been wonderful to work with you.

Kind Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Page 1107

**is withheld pursuant to sections
est retenue en vertu des articles**

19(1), 20(1)(b)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

s.19(1)

From:
Sent: January 16, 2020 6:54 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Fwd: Delivery Status Notification (Failure)
Attachments: 190820 DND Report Case Study Women Recruitment low res.pdf

Dear LCol Allison,

My email with the final report attached did not reach you (see below).

Hereby I am resending you the email with a reduced file size.

Dear LCol Allison, Major Bowen, and trainees,

I hope 2020 has been treating you well so far!

Please find the Live Case Study report attached: thank you so much to those of you who have provided us with feedback between Christmas and last week, and for your kind words on the final draft! Of course; if there are any remaining questions or comments we can still address them. You still have access to the editable version of the attached report, and we receive notifications of comments.

Many of you have been in touch since the course, which is wonderful. We always love to help, so as ever; if you have any questions, please do not hesitate to get in touch.

I hope to see you all again soon,

With best wishes,

www.emicconsulting.co.uk

emic Consulting

Begin forwarded message:

From: Mail Delivery Subsystem <mailer-daemon@googlemail.com>
Subject: Delivery Status Notification (Failure)

A0447856_1-001108

s.19(1)

Date: 17 January 2020 at 00:38:50 CET
To:



Message too large

Your message couldn't be delivered to DOUGLAS.ALLISON@forces.gc.ca because it exceeds the size limit. Try reducing the message size and resending.

The response from the remote server was:
552 size limit exceeded

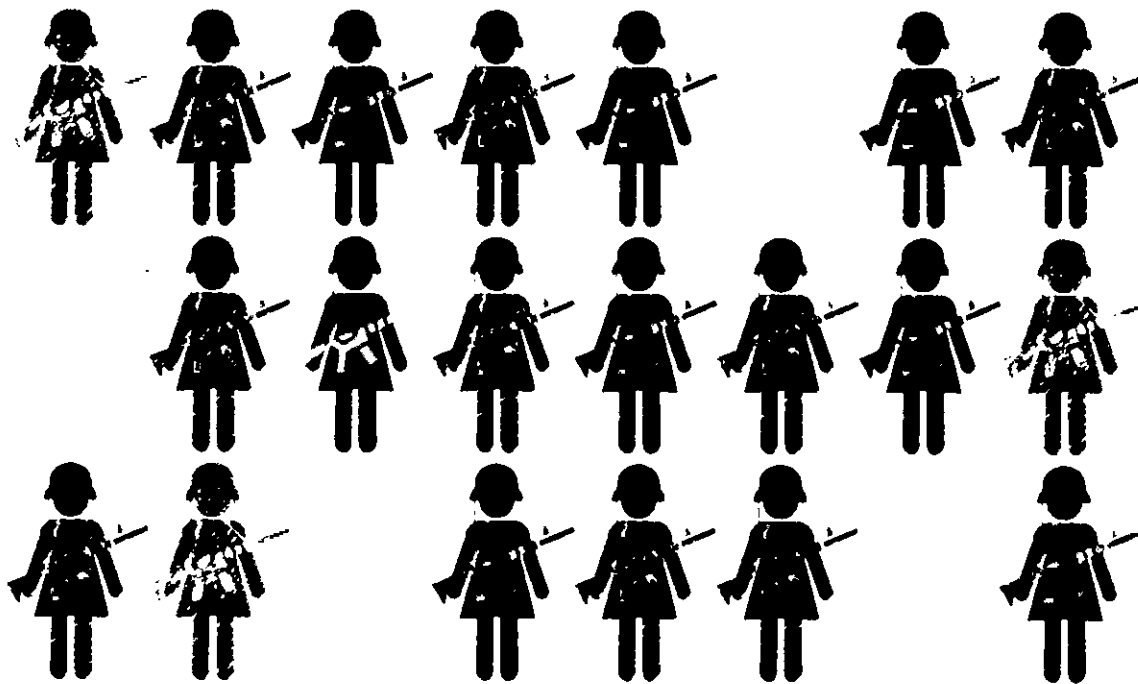
Reporting-MTA: dns; [googlemail.com](https://www.google.com)
Received-From-MTA: dns;
Arrival-Date: Thu, 16 Jan 2020 15:38:31 -0800 (PST)
X-Original-Message-ID: <1A3FDE18-53BA-481D-BC76-69DCBC88E529@emicconsulting.co.uk>

Final-Recipient: rfc822; DOUGLAS.ALLISON@forces.gc.ca
Action: failed
Status: 5.0.0
Remote-MTA: dns; mx01.forces.gc.ca. (131.137.245.201, the server for the domain forces.gc.ca.)
Diagnostic-Code: smtp; 552 size limit exceeded
Last-Attempt-Date: Thu, 16 Jan 2020 15:38:50 -0800 (PST)

From:
Subject: Re: A Christmas Present
Date: 17 January 2020 at 00:37:53 CET
To: DOUGLAS.ALLISON@forces.gc.ca,
Cc:

Recruiting Women into the Combat Arms

A Behavioural Dynamics Methodology Course Live Case Study into the recruitment of women aged 16-25 into combat arms roles within the Canadian Armed Forces.



December 2019

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1. How to read this report

This report is a write-up of the Live Case Study designed for Behavioural Dynamics Methodology (BDM) course trainees to put taught materials into practice. It serves three purposes:

The first is to serve as an overview of the research process used and the steps taken in the implementation of the BDM as a reference for the trainees and a useful template for further BDM project work these new BDM practitioners will hopefully undertake. For this reason, it differs from a typical research and recommendations report in that it lists findings according to Factors and Parameters (following the BDM research process rather than a more traditional way of writing up findings).

The second aim is to present the findings and recommendations from the primary research that was conducted so that they may be of use in the design of further research into this topic and/or can be taken into account in the design of recruitment materials.

The third aim is for people who have little or no knowledge of the BDM to be able to read and understand this report; for this reason an overview of the methodology has been included, as well as the definitions of the studied social scientific concepts in a detailed Glossary of Terms.

Contact

For questions about this report, please contact:

Emic Consulting

E:

s.19(1)

2. Acknowledgements

The Live Case Study presented in this report was conducted by twenty trainees and four main trainers during the seven week BDM course held at the Defence Public Affairs Learning Centre (National Printing Bureau, Gatineau).

First of all, we would like to thank the trainees on this course: Rachael Allen, Jamie Bresolin, Jason Broadbent, Alexia Croizer, Olivier Gallant, Belinda Groves, Christine Hurov, Hrayr Karageozian, Stuart MacNeil, Annie Morin, Anna Nicolle, Eric Ouellet, Peter Reed, Bradley Roy, Peter Ryan, Shalako Smith, Travis Smyth, Indira Thackorie, Suzy Waldman, and Nathalie Wan.

These trainees have gone above and beyond: learning a new methodology not previously taught at the DND, learning about social science research methods and putting both into practice in the space of seven weeks is no small feat, and we would like to congratulate and thank all trainees for their hard work and enthusiasm. Most of the work presented here is theirs.

We would also like to thank BGen J. Janzen, LCol. Allison, and the team at DPALC for making this course possible and for all their help and support in ensuring its success.

Lastly, we give our special gratitude to Major Dave Bowen and acknowledge his crucial role as the DND project Director for this course. His knowledge of the methodology as a past trainee meant that he was instrumental in ensuring a course design fit for the DND, and his knowledge and contributions to the Live Case Study have made this course the very best it can be. Additionally, we cannot thank Major Bowen enough for his unwavering support and for all of his help to us personally outside of course hours.

You all have made us feel so welcome in Canada and we are honoured and grateful to have met such wonderful people. We hope the taught materials from this course will serve you in your future careers! Please keep in touch, we are always here to answer any questions you may have in implementing the BDM or conducting any kind of social science research.

On behalf of the entire BDM 2019 training team,



3. Executive Summary

Overview

The Live Case Study presented in this report was conducted by twenty trainees and four main trainers during the seven week Behavioural Dynamics Methodology (BDM) course held at the Defence Public Affairs Learning Centre (National Printing Bureau, Gatineau), September to November 2019. The BDM has been applied to many different behavioural problems in areas such as counter-radicalisation, pre-mission analyses, security and programme evaluations.

The primary aim of the Live Case Study was for trainees to put taught materials into practice. As such, the Live Case Study topic needed to relate to a problem that is both pertinent to the DND and local (to ensure access to research respondents for interviews). The choice was made to study the recruitment of 16-25 year old women into the combat arms. Rather than considering this report the outcome of a typical BDM project, the restrictions of a seven week course and implementation by trainees should be taken into account and it should be read as an example of the type of output the implementation of the BDM can generate. Full BDM projects are more comprehensive and lead to more detailed recommendations. Nonetheless, the findings and recommendations presented here will hopefully add value to the implementation of DND marketing and recruitment campaigns aimed at interesting young women for combat arms roles.

Summary of Findings

The following findings are based on a qualitative sample consisting of 22 members of the Target Group (TG): women between the ages of 16 and 25.

- There is a general lack of awareness concerning the Canadian Armed Forces - and particularly the combat arms - among the Target Group. Interviewees who were (somewhat) aware of the various careers within the Canadian Armed Forces had little-to-no interest in pursuing these opportunities.
- In most cases, social barriers do not preclude the Target Group from joining the CAF/combat arms or more male-dominated careers, though in some instances cultural identities further compounded gender as a social barrier to joining the CAF.
- There was low-level attractiveness among the interviewees for careers in the CAF on a personal level (although mostly the TG were supportive of the CAF as an institution). Mostly, roles within the CAF did not chime with what the respondents considered to be their identity.
- Many of the TG felt that they didn't have the ability (mental and/or physical) to pursue a career in the CAF/combat arms. Some of the TG additionally said they believe their peer group also do not have the psychological or emotional ability to work in the CAF.
- The bulk of interviewees considered that joining the CAF/combat arms was a dangerous pursuit, with many highlighting the physical and psychological risks and one respondent highlighting the risks of (potential) sexual assault/harassment.
- Current CAF campaigns appear to be (generally) unseen, filtered or not resonating with the TG.

Key Recommendations

- Find a sharper focus on the Target Group, specifically for combat arms. These will be a very specific subset within the broad cultural group of 16-25 year old active females.
- Create a visually distinct and separate set of campaign materials for the combat arms objective. Advertising for combat arms recruitment should not be confused with CAF military career recruitment and should not create a sense of risk for candidates applying for non-combat arms roles.
- Make the case clearly that being trained in combat and the use of combat weapons is not the ultimate aim and objective. This is not about creating conflict but ending it.
- Formally or informally establish either a platoon, or a network, or a specialist training regime that allows female combat arms recruits to come together and find their own identity in a traditionally male-identifying situation.
- Leverage the altruism theme prevalent in the Target Group, and make the case that combat arms personnel have a difficult but important role to play in the defence and protection of others less able to resist oppression or invasion. It is a frontline role defending liberty and democracy. It is the tough job that has to be done by somebody, and it's better if it is done by people who have a sense of compassion, balance, and a desire to see an end to suffering.
- Explicitly highlight that women joining combat arms is not unprecedented nor a bold experiment to align with women's progressive movements today. Women are historically intrinsic to the armed forces, and there remain important reasons for them to be present in combat arms situations. These reasons do not pertain to women being as good as, or better than men. Rather, they pertain to the need for gender balance in combat situations, to ensure female perspectives and rationales are considered. Introducing more women to combat arms will allow these forces to think differently, and potentially more fully, about scenarios and situations.

4. Introduction

This report is the result of a Live Case Study conducted as part of a seven-week training course in the Behavioural Dynamics Methodology, from 23 September-8 November 2019 at the Defence Public Affairs Learning Centre (National Printing Bureau, Gatineau).

As part of this type of course, trainees normally work in syndicates on exercises and case studies, including one 'Live Case Study' that runs throughout the entire course. A Live Case Study simulates a project using the Behavioural Dynamics Methodology; it is a study of a problem that is chosen by, and relevant to, the client. The trainees design research, and real data is collected from the field. The trainees analyse the data and use the insights from their study to create recommendations for Strategic Communication.

The Live Case Study primarily served as an opportunity to transfer and practice what the trainees were learning and developing in the classroom and apply it to an ongoing, real-world situation in all its complexity and unpredictability. After all, Strategic Communication is never done in a vacuum, and nor is the research that feeds its data-driven design. Good research in this field is by definition 'messy': at every step new insights lead to the re-evaluation of hypotheses and research methods. Good research in this field is also (almost) never all-encompassing: one of the most important decisions researchers face is what research questions to ask and what data to collect in order to gain specific insights that can be used to design strategies for change that work within time and resource constraints.

The skills and knowledge needed to conduct good quality research for behaviour change can be taught; however, like in any specialism, these skills can only develop fully through practice and experience. During this course, the 20 trainees worked in four syndicates on the problem of female recruitment for combat arms roles. The research was scoped to fit course constraints first, with a secondary aim to achieve a specific desired endstate other than the learning outcome. This, plus the fact that this research was conducted by people still in training, means that this report should not be seen as a full research project culminating in a full communication strategy.

The initial case study topic provided by the DND was: *the recruitment of underrepresented female minorities into the Canadian Armed Forces (CAF)*. At the start of the course, on the basis of desk-based research (DBR) and discussions between Emic consultants, Major Dave Bowen and the course trainees (on 24 September 2019), this topic was changed to: *the recruitment of women aged 16-25 into CAF combat roles*.

Recruiting more women into the CAF has been a long-standing issue. DBR, with an emphasis on the academic literature, suggested that the rationale for increased female recruitment into the CAF tends to settle on one (or more) of the following, often overlapping, themes: legalities, operational effectiveness, and political-cultural issues.

The legal aspect, as far as employment equity is concerned, can be traced back to Lloyd Axworthy, the Minister of Employment and Immigration in Pierre Trudeau's liberal government, and the setting up of the Royal Commission on Equality in Employment in 1983. From these roots sprung the Employment Equity Act (EEA) which the CAF was subjected to in

2002. The EEA was put in place to increase diversity in organisations and under its umbrella the CAF must “work diligently to ensure recruitment, development, and retention of Employment Equity Groups” including women (Sharpe, 2018). In 1989, the CAF were instructed to “fully integrate” women by a Canadian Human Rights Tribunal signifying what Gouliquer (2011) called “a major step towards equality” going on to highlight that “few nations allow women unrestricted access to all military occupations.” It wasn’t until 2001, however, that complete inclusion was fully realised when women were permitted to serve aboard submarines (Sharpe, 2018).

Running alongside these legalities are the slightly more nuanced issues of operational effectiveness and political-cultural concerns. Waruszynski et al (2019) acknowledge that because females represent slightly more than half of the Canadian population that the CAF should be taking advantage of these “highly skilled and qualified people” who would be of benefit. Diverse ideas and different perspectives, they argue, can foster new ways of thinking and the authors go on to suggest that “...attracting and retaining women to join the CAF goes beyond politics and employment equity: it is about strengthening military capabilities and operational effectiveness.” This is a view echoed by Bercuson (2018) who put forward sound reasons for the government wanting to see more women in the Canadian military, namely that, “female perspectives in the entire range of armed forces activities and defence-related matters is crucial and that any nation, company or military force that either excludes or does not encourage full participation of one half of humanity in its endeavours will be outpaced by those who do.” Expert on diversity within the Canadian Forces, Dr Alan Okros, agrees, stating that these ideas around diversity have been coalescing for some time and that it isn’t luxury or social engineering. Nor, he says, is it political correctness or political maneuvering. Rather, “it is now an operational requirement.” (see Sharpe, 2018)

Whilst acceptance of diversity in an all-volunteer military (AVM) is considered by some commentators to be as important as combat effectiveness (Sharpe, 2018) it is also worth considering that it benefits society at large and that, “if an army does not reflect the values and composition of the larger society that nurtures it, it invariably loses the support and allegiance of that society” (Jung, 2008).

The CAF objective of increasing female representation to 25% is not new, nor has it been hidden from the public. A 19% target was set in 2009 and despite a lack of significant progress, this figure was increased by a further 6% in 2011 as part of a recommendation by the Canadian Human Rights Commission. In 2016, the Auditor General Report highlighted the urgent need for the CAF to meet its intended target and included specific recommendations. The deadline was extended to 2026.

Desk-based research alongside group discussions and expert interviews with those who have an intimate knowledge of the make-up of the CAF revealed that in order to have a realistic chance of meeting this 25% target a substantial number of females needed to be recruited into (and, indeed, retained within) the combat arms trades.

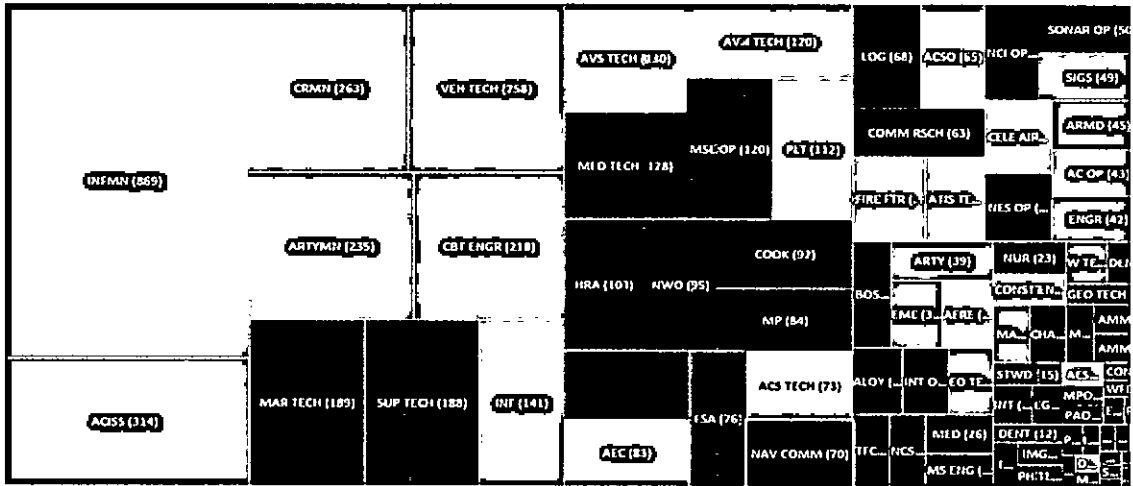
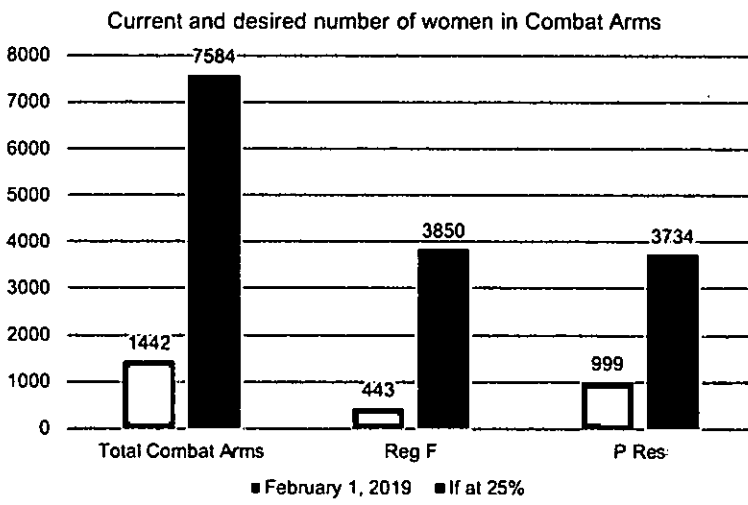


Figure 1: areas in green are combat arms units with roughly 95%-5% male/female composition.

Currently, females make up fewer than 5% of combat arms members and this number needs to grow five-fold if CAF targets are to be met (see Figure 1). As part of the BDM training course, the case study sought to explore some of the issues surrounding females joining the combat arms, the feasibility of increasing the numbers significantly, avenues for future research and potential recruitment campaigns. Practical, logistical and time constraints meant that the focus of the research was on what was considered to be the most likely (and arguably most suitable) cohort to join the combat arms: 16-25 year-old-women.



Graph 1: Current and desired number of women in combat arms. Source: National Defence and the Canadian Armed Forces. (2019). Women in the Canadian Armed Forces.

Based on February 2019 data: To reach 25% women in the Combat Arms, the gap is an additional 6,142 women (Reg and Res, not taking into consideration attrition and ongoing enrolment of men).

Retrieved from: <http://www.forces.gc.ca/en/news/article.page?doc=women-in-the-canadian-armed-forces/izkjqzeu>

5. The Behavioural Dynamics Methodology

The BDM is a tried-and-tested framework for thinking through behavioural problems and designing change strategies that work. The Methodology was developed over three decades and has seen inputs from many scholars and practitioners in the fields of influence, behaviour change, psychology and the social sciences. The framework thus has both scientific rigour and practical utility, and it continues to be updated with the latest knowledge from academia and the field.

As a framework for problem-solving, the success in using the BDM is highly dependent on skilled practitioner-thinkers who have a robust knowledge base coupled with flexibility of thought. The course that this report is based on aims to equip trainees with the critical thinking skills and problem-solving capabilities that enable them to analyse and understand complex behavioural systems. They were provided with the necessary research techniques and behavioural science tools to create change strategies that work.

The BDM is scalable and adaptable, and its application is dependent on the demands of the problem situation. As such, the Live Case Study example in this report demonstrates one use of the many tools BDM practitioners have at their disposal.

The BDM Methodology Cycle

The BDM Project Cycle is a 5-stage cycle that moves iteratively through:

Conception of a Strategic Campaign to change behaviour;

Designation, investigation and analysis of appropriate target audiences; and

Development of an impactful Campaign Intervention Strategy.

Meanwhile, it develops and builds on Measurable Behavioural Outcomes to lay the groundwork for verifiable Measurement, Evaluation & Learning from the project activity.

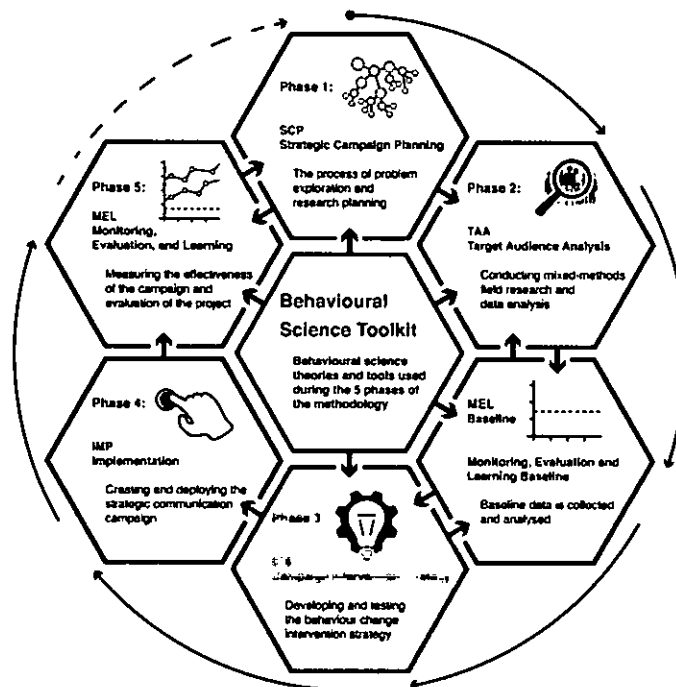


Figure 2 (right): The BDM Methodology

Audience Research and Change Modelling

The BDM process never generalises about audiences and what appeals to and shifts them. Instead it develops intensive data on target audiences through carefully staged processes of

literature and open source review, consultation of subject matter experts, and qualitative and quantitative research. This process is termed Actor and Audience Analysis (AAA). Data from AAA is analysed using Emic Logic, which aims to stay grounded in conceptual schemes and categories regarded as meaningful and appropriate to members of the audience itself. Research findings are combined with social science theories about individual and group change to ensure Strategic Interventions target the most accessible audiences in the most impactful ways.

Campaign Intervention Strategy (CIS) Model

In designing a communication or other strategic campaign, the BDM CIS Model brings to bear a comprehensive understanding of the determinants of individual and group change. Some of the change determinants that the BDM builds into decision-making about interventions for a target group are the *motivations, evaluations, capabilities, environmental contexts, patterns of social influence* and *barriers* faced by the group. Through assessment of these determinants, the BDM process provides for the development of distinctive, data-grounded decisions about how to best set the stage for changes in the target audience.

Determinant		Definition	
Motivation	Reflective	The driving force preceding, directing, intensifying, and maintaining or terminating a behaviour. May be conscious (reflective) or unconscious (automatic).	Mental processes that involve plans and evaluations towards a behaviour. They include social identity, goals, optimism, needs, and intentions.
	Automatic		Automatic processes that involve emotional reactions, desires, impulses, inhibitions, drive states and reflex responses.
Evaluations: Attitudes, Beliefs and Expectations		The general evaluations of a behaviour and the likely consequences of carrying out (or not carrying out) that behaviour.	
Capabilities	Physical	The ability to enact a behaviour	Possessing the physical skill, strength or stamina to carry out a behaviour.
	Psychological		Possessing the cognitive, affective and interpersonal skills, strength or stamina to engage in the necessary mental processes (such as decision-making processes, attention, and emotional and social tact) required for a behaviour.
Social Influence		The influences of other people - especially those within groups - that encourage or discourage a behaviour. These include social and cultural norms, shared concepts and language, as well as historical and cultural precedents.	
Infosphere		The information environment that consists of media, language, literature, political and marketing communication, and digital technologies that shape individual and group behaviour.	
Knowledge and Awareness		An awareness of the desirability of carrying out a behaviour and the relevant knowledge needed of how and why to carry out that behaviour.	
Environmental Context		The opportunity afforded by the environment - such as time, resources, locations, cues, and physical affordances - to encourage or discourage a behaviour.	
Barriers		The existence of specific environmental or societal restrictions (e.g. laws) that prevent or limit a behaviour.	

Figure 3: BDM CIS Determinants Model

Measures of Effectiveness

The BDM process incorporates a rigorous process of measuring, evaluating, and learning from a wide variety of indicators of project outcomes. These include:

- Intervention Indicators such as Measures of Activity and Measures of Performance
- Direct indicators of the potential success of a campaign observable through field research, observation, and available data sources (e.g. economic data, media analysis);
- Audience Indicators capturing other changes in the audience that are possibly attributable to the campaign, such as attitude changes.

These indicators are carefully designated, baselined, tracked, and analysed throughout the BDM process, to provide statistical validation of whether project objectives are being achieved and returns-on-investments are being demonstrated.

The emic Evaluation Framework

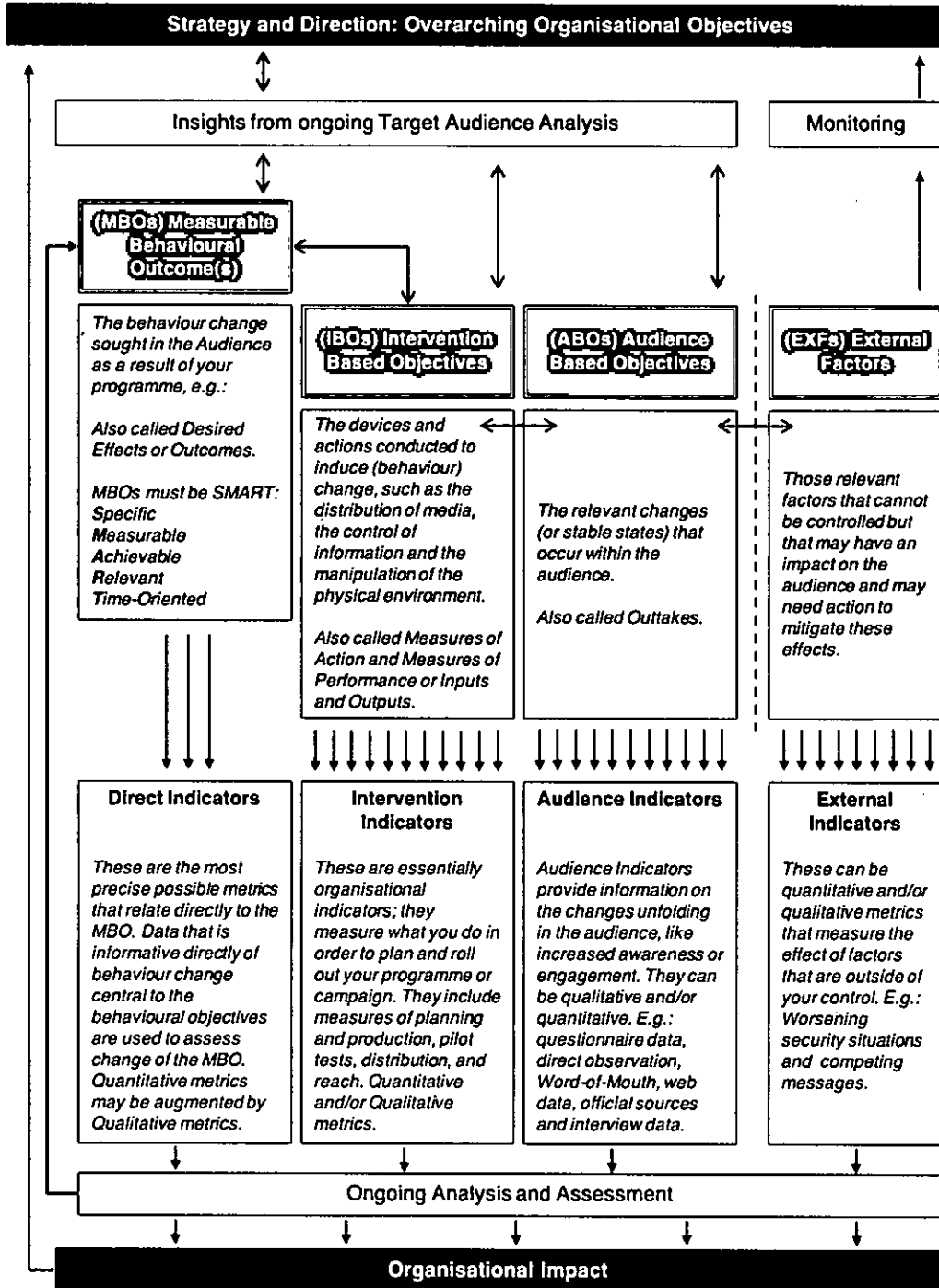


Figure 4: MOE model used in BDM

Parameters

A key feature of the BDM is its application of 44 Parameters of group behaviour change with an evidentiary basis in the social sciences. Parameters are used at multiple stages of the project cycle to help guide the research conducted, to analyse that research, and to steer the design of an effective intervention strategy. BDM Parameters are subdivided according to whether they are Descriptive of the nature of groups, Prognostic of whether groups have the potential to change, or Transformative of a group's behaviour.

DESCRIPTIVE	PROGNOSTIC	TRANSFORMATIVE
Audience Statistics	Beliefs	Ability
Channel Credibility	Fragility / Resistance	Attitudes
Channel Exposure	Ideology	Binary Opposition
Current Behaviour	Influenceability	Common Enemies
Financing	Informational Reliance	Decision Path
Group Composition	Instrumental Behaviour	Expectancy
Group Membership	Intent	Fears
Historic Context	Locus of Control	Filters
Language	Motivations	Initiating Sets
Leadership Structure	Normative Affiliation	Message Appeals
Literacy	Polarising Motivating Propensity	Noise
Mission	Power Structures	Reward Structures
Needs	Propensity for Change	Rituals
Relevant Issues	Skill	Source credibility
Size		
Values and Norms		

Figure 5: BDM Parameters

The next section follows a description of the BDM Phases as they were applied to the Live Case Study during the DND BDM course.

6. The Live Case Study: Process and Research

Strategic Campaign Planning (SCP)

Problem Space Analysis

Strategic Campaign Planning is the first Phase of the BDM. The process of SCP aims to set measurable and feasible behavioural objectives for the campaign and to formulate a robust AAA research plan. Careful research and analytical procedures are required to do this.

The comprehensive aims of the first phase of the BDM are:

- To develop an understanding of the problem space by breaking down the general problem into smaller, logically connected parts. The specific parts should systematically address the various aspects of the problem.
- To formulate the best possible general and specific project objectives.
- To identify which behavioural change will measurably contribute to achieving the project objectives.
- To identify the groups that are most accessible, amenable to influence, and closely related to the survival of the target behaviour(s).
- To formulate a research plan that will yield data for designing a strategic communication campaign.

In order to achieve these aims, desk-based research and open-source intelligence (OSINT) is conducted, after which subject-matter expert (SME) interviews (and sometimes also preliminary qualitative field interviews) can deepen the understanding of the problem space. Sometimes a behavioural objective set at the outset of a project will have to be refined on the basis of field research that challenges initial assumptions.

Creating a Problem Space Map (PSM) is an effective method for exploring problems and is the cornerstone of Strategic Campaign Planning (SCP). PSMs have several purposes:

- They help us to understand the many variables of a behavioural problem (the problem space) and to map the relations of those variables as they pertain to a specific Non-Desired Behaviour (NDB) or Desired Behaviour (DB). Importantly, this leads to a much deeper and shared understanding of complex problems and, ultimately, to more effective solutions.
- They afford us the insight to formulate the best possible general and specific Measurable Behavioural Objectives (MBOs) which the programme aims to achieve and which will become the benchmark for success in evaluation (the MEL Phase of the methodology). General behaviour is broken down into smaller and logically connected parts, allowing us to address the various aspects of the problem.
- They can aid the identification of the groups and associated behaviours (the Group-Behaviour Pairs) that are most relevant to the survival of the NDB/DB and thus the focus for research in Phase 2 Actor and Audience Analysis (AAA).

To develop a PSM, it is easiest to start with a behaviour that needs to be changed (a Non-Desired Behaviour or ‘NDB’) or a behaviour that needs to be adopted (a Desired Behaviour or ‘DB’). The NDB/DB will be related to a Concept. The Concept is the broader reason for changing the behaviour. The PSM process for the Live Case Study began as follows:

The Concept for the Live Case Study: Improving CAF through better reflection of society.

The Desired Behaviour: Recruitment of women aged 16-25 into CAF combat roles.

From the NDB/DB, various Factors are attached. Factors are components that causally contribute to the NDB/DB and, ultimately, the Concept. That is, there is a cause-effect relationship between the Factor(s), the NDB/DB and the Concept.

In a PSM, the Factors should comprehensively represent the NDB/DB without gaps and without overlapping.

The following Factors - as shown in a simple version of a Problem Space Map - were derived during week 1 of the course as part of group syndicate work that lasted several days. Discussions, brainstorming and existing literature facilitated the initial generation of Factors, and then refinement took place via critical reflection and debate to arrive at these ten core Factors for further research:

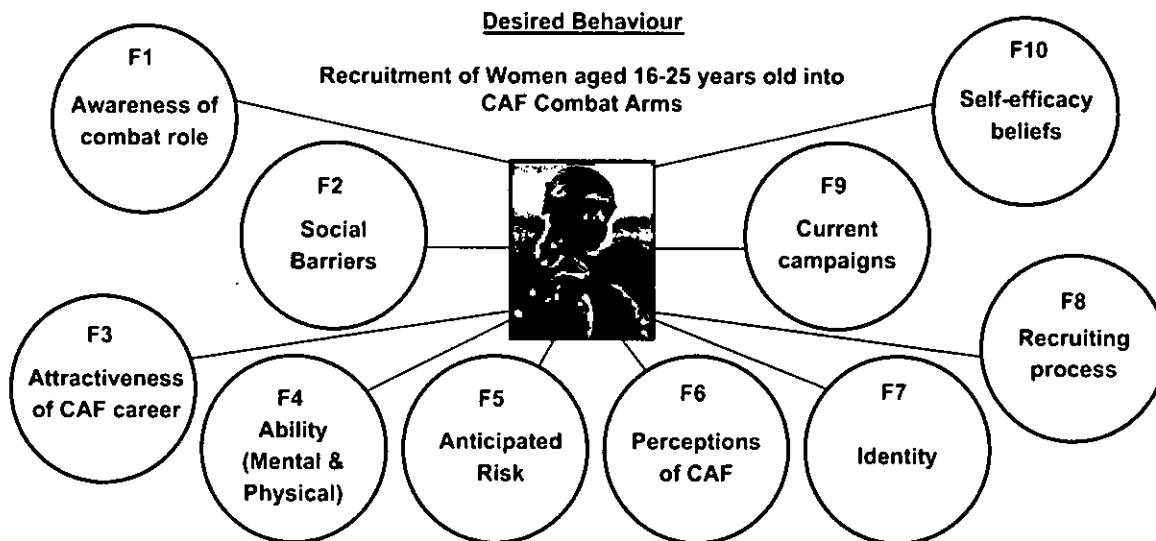


Figure 6: Live Case Study Problem Space Map

Factor definitions are provided in Table 1 overleaf.

Factor	Factor Definition
F1 Awareness of combat role	The awareness of the opportunity for Canadian females aged 16-25 (the Target Group; TG) to join the CAF in a combat capacity
F2 Social barriers	The social barriers that may deter or inhibit the TG from seeking a CAF combat career
F3 Attractiveness of CAF career	The extent to which the TG consider the CAF an attractive career path (in itself, and compared with other career opportunities)
F4 Ability (mental and physical)	The mental and physical ability of the TG to enable them to join CAF in a combat role
F5 Anticipated risk	The TG's perceived risks (sexual, physical, psychological) and dangers of joining CAF
F6 Perceptions of CAF	The general (societal) and specific (TG) perceptions and attitudes of the CAF
F7 Identity	The sense of social identity that the TG has (or anticipates having) within CAF, and specifically in a combat role
F8 Recruiting process	The overall effectiveness of the recruiting process – both attracting applicants, and keeping them interested
F9 Current campaigns	The effectiveness and resonance of current recruitment/awareness campaigns that CAF produce
F10 Self-efficacy beliefs	The extent to which the TG feel they have the ability to meet the challenge of a CAF combat role

Table 1: Live Case Study Factor Definitions

Each of the factors in a Problem Space Map may be disaggregated into a number of individual behaviours which are linked to the groups which may undertake them. These form group-behaviour pairs: a collection of groups who are associated with a particular behaviour.

Overleaf is an example of a more complete Problem Space Map created by the course trainees, with Group-Behaviour Pairs included.

This image is not intended to be legible but serves as a visual illustration of the process of Problem Space Mapping. Depicted in red circles are the Factors (the 10 that have been identified and explained above), which are then disaggregated into the behaviours that make up that factor (in blue) and all groups (actors - in green) that are relevant to that behaviour: whether they contribute to it, make it possible, aim to stop it, or facilitate it.

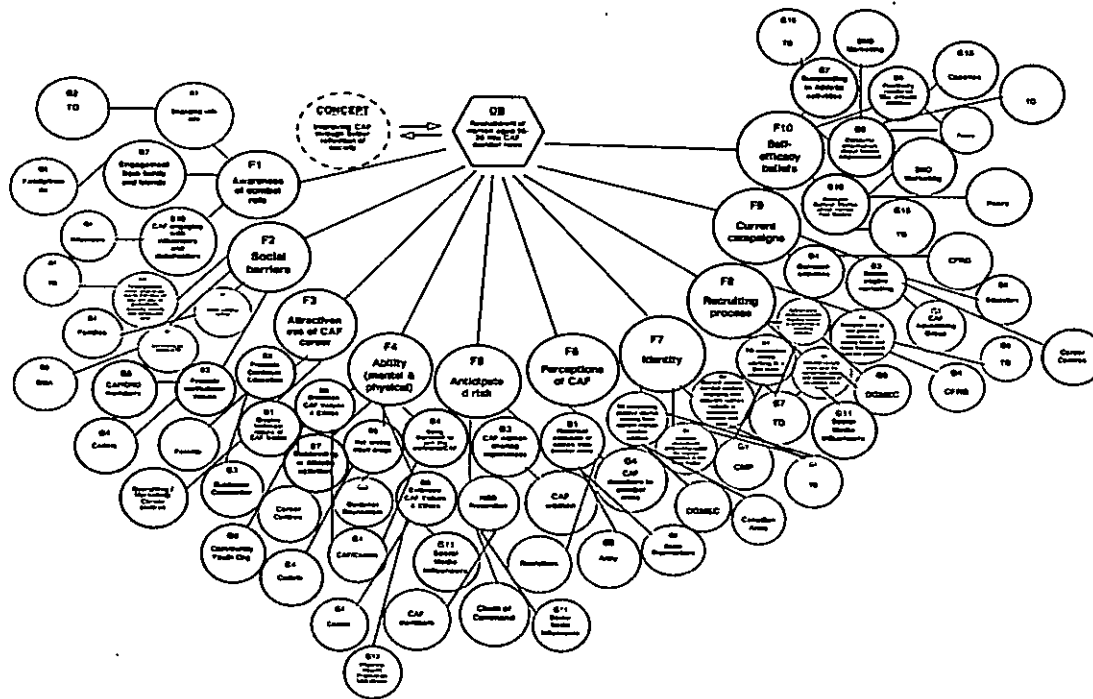


Figure 7: Trainee Live Case Study Problem Space Map

The four syndicates all worked from their factors towards a list of group-behaviour pairs. The goal of forming group-behaviour pairs is to select the groups that are most likely to be influenced by a campaign and whose behaviour, if changed, would make a significant difference to the overarching project objectives.

There are many Group-Behaviour Pairs associated with each Factor (more than can be shown in the visual above) and thus they are usually displayed as a list after the collaborative exercise of Problem Space Mapping.

Each group-behaviour pair is subsequently assessed against four criteria:

1. Accessibility (A): Can we access and affect this group-behaviour pair?
2. Salience of Impact (S): If we persuaded this group to change their behaviour, to what degree would it impact the objective?
3. Influenceability (I): What chance would there be of persuading this group's members to change their behaviour?
4. Measurability (M): If we did successfully persuade the group to change its behaviour, would we be able to observe and measure that change?

An example of a list that would typically run into the hundreds is provided overleaf - see Table 2.

Factor	Sub-Factor	Behaviour	Group	A	M	S	I	Total
F5: Anticipated Risk	Fear of Injuries	CAF members communicating about CAF risks	CAF members	5	4	3	5	4.3
F5: Anticipated Risk	Fear of Injuries	Publicising safety statistics	CAF advertising group	5	4	3	5	4.3
F5: Anticipated Risk	Fear of Injuries	Publicising safety statistics	CAF health services	5	4	3	5	4.3
F5: Anticipated Risk	HISB	CAF women sharing experiences	CAF women	5	4	4	5	4.5
F5: Anticipated Risk	HISB	HISB Prevention	CAF members	5	3	5	2	3.8
F5: Anticipated Risk	HISB	HISB Prevention	Chain of Command	5	4	3	4	4
F5: Anticipated Risk	HISB	HISB Prevention	Media	4	3	4	2	3.3

Table 2: Group-Behaviour Pair Shortlisting Table

Desk-Based Research and SME Interviews

Desk-Based Research (DBR) was conducted before, throughout and after the course in order to investigate Factors and contextualise this research. Additionally, some Subject-Matter Experts (SMEs) were interviewed for their knowledge on relevant topic areas related to the Live Case Study.

In total, interviews were conducted with the following Subject-Matter Experts:

- SME 1: Marketing and Attractions CFRG
- SME 2: Director, Marketing and Communications
- SME 3: Liaison Officer, CFRG
- SME 4: Staff Officer Attraction and Retention for Canadian Forces Health Services Group HQ
- SME 5: Director, Department of Marketing and Advertising
- SME 6: Master Corporal, Canadian Grenadier Guards (Reserve)

Summaries of the conversations with these experts can be found in Appendix B: Expert Interview Summaries.

Research Questions

On the basis of DBR, SME interviews and discussions, the following research questions were drawn up for qualitative research with the Target Group: 16-25 year-old females in Ottawa.

- To what extent do the TG think that it is proper to put “the good of the nation” before their own personal interests and needs?

- To what degree do the TG have confidence in their own athletic abilities and in their ability to set and achieve their athletic goals and dreams?
- Do role models play an important role in the TG's lives? Who are the TG's role models and why?
- What does empowerment mean/look like to the TG? Do they think empowerment is important to living the life they want to lead?
- Are the TG aware of (and engage with) the opportunities available to them in the public sector, and in particular, the CAF? If so, how do they know about these opportunities? (E.g. ads, careers advice, recruitment fairs.)
- What do the TG think of these opportunities? That is, are they attractive to the TG?
- What government/public service careers have the TG considered – and in particular, have they considered the army?
- Have/would they ever consider a dangerous profession (e.g. fire service, army), and why/why not?
- Do the TG consider themselves mentally, physically, and socially able to pursue such careers, and what, if any, barriers do they perceive?
- To what extent, if any, do the TG see a natural fit between themselves – their identity – and government/public sector/defence careers?
- What do the TG enjoy about the sport they do? What does participating in organized sports give the TG?
- What values/ethics are most important to the TG, and to what extent do these overlap with CAF values and ethics?
- Is the TG aware the CAF is specifically interested in recruiting women into the combat forces; and whether or not they are, what does the TG think of that idea?
- Where does the TG go for information about jobs/careers? Specifically, who advises the TG on career choices, and when do the TG make career choices?
- What kind of advertisement appeals to the TG? Have they recently seen any Canadian army ads that they like? Where did they see it? Why do they like it?
- What is the TG's perception of CAF? How do they think their peer group/extended network feels about CAF?

Actor and Audience Analysis (AAA)

Actor and Audience Analysis (AAA) is the second Phase of the BDM process. It is also sometimes referred to as Target Audience Analysis. AAA is the use of valid and reliable scientific measurement tools to examine target groups whose behaviour we have an interest in changing in line with the project objectives set out in Phase 1 SCP. The process aims to build a profile of relevant TGs, to identify potential pathways to behaviour change, and to identify potentially resonant communication programmes. The AAA process typically deploys both qualitative and quantitative research techniques (mixed-methods designs and analysis) to gather data from the groups in the field. The research process is underpinned at all stages by the BDM behavioural sciences toolkit which integrates social and behavioural social science theories and methods and the bespoke BDM Parameters. In addition to the qualitative and quantitative methods used, BDM research projects often utilise findings from semiotics research too.

For the Live Case Study the following AAA qualitative research was conducted:

- Round 1: 9 semi-structured in-depth interviews conducted by trainees with TG volunteers on October 9th 2019.
- Round 2: 13 semi-structured in-depth interviews conducted by trainees with TG volunteers on October 28th 2019.
- Round 3: one focus group discussion facilitated by two course trainees and six TG volunteers on November 5th 2019.

Additionally, semiotics research was conducted throughout the duration of the training course - this was primarily carried out by a semiotics expert from the training team, with some input from the trainees.

Lastly, a quantitative survey instrument was compiled for training practice, but was not administered in the field due to the election period.

Qualitative Research

Developing the Qualitative Interview Guides

The interview design and conducting was undertaken by the trainees with assistance and tutelage from the training team. Each interview guide was compiled based upon a set of relevant and important research questions (see above for the research questions that guided round 1 interviews), which were designed to investigate the Factors identified in the PSM activity and Parameters relevant to understanding the current behaviour of the target group. This technique is demonstrated in the following three examples:

Example One:

Research Question: To what degree do the TG have confidence in their own athletic abilities and in their ability to set and achieve their athletic goals and dreams? (Factor 4: Ability; Factor 10: Self-efficacy beliefs)

Interview Guide Question: If you were given the opportunity to start a new sport today, what would it be? Have you ever had a goal that took some time to achieve? How did you do that? How do you define success in team vs individual sport?

Relevant BDM Parameters: Motivation, Intent, Locus of Control, Attitudes.

Example Two:

Research Question: What does empowerment mean/look like to the TG? Do they think empowerment is important to living the life they want to lead? (Factor 7: Identity; Factor 2: Social Barriers)

Interview Guide Questions: How much importance do you place on having control over all aspects of your career? Tell me about an activity that would be extremely difficult and

challenging for you. What would it take for you to undertake this activity? In what areas do you see women succeeding in things that they haven't succeeded in before? Do you think there are things that women can't do as well as men and vice versa?

Relevant BDM Parameters: Motivations, Mission, Intent, Power Structure, Leadership Structure, Expectancy, Locus of Control, Propensity for Change.

Example Three:

Research Question: Are the TG aware of (and engage with) the opportunities available to them in the public sector, and in particular, the CAF? If so, how do they know about these opportunities? What do the TG think of these opportunities? That is, are they attractive to the TG? (Factor 1: Awareness; Factor 3: Attractiveness)

Interview Guide Questions: Have you ever considered a job or career in the Canadian army? Does a career in the army appeal to you in any way? Would it appeal to any of your friends? Why/why not? Do you know what is meant by a combat role in the army?

Relevant BDM Parameters: Attitudes, Values, Motivation, Intent, Norms, Decision Path, Current Behaviour

The complete Round 1 Qualitative Interview Guide is displayed in Appendix C.

The round 2 qualitative interview guide was constructed using the same basic process as described above for the round 1 guide. The round 2 guide was different from the round 1 guide because it aimed to investigate a different array of research questions (the Round 2 Qualitative Interview Guide is in Appendix E). These new questions arose as a result of the qualitative analysis of the round 1 interviews and additional desk-based research (see Appendix D for this additional substantiating evidence). Some interview questions sought to corroborate some of the findings from round 1, whilst other questions sought to investigate new angles relevant to the emerging understanding of the TG and the problem space. The TG participants for round 2 also were selected on the basis of a slightly modified screener which emphasised the desire to talk in depth about the role of females in non-traditional female/male dominated careers. This change was made in order to more vigorously explore the relationship between the TG's identity and careers that involved risk, adversity, and social perceptions of unfemininity. Some of the additional research questions were as follows:

- Would the TG be interested in combat arms roles that took up less time and allowed them to pursue their chosen careers simultaneously (i.e. The Reserves)?
- Is it that the TG are mostly not *receiving* information from the CAF, or is it more the case that they are filtering out these messages?
- To what extent are the TG aware of the positive role(s) the CAF play in Canadian society/across the world?
- Where, if anywhere, do the TG's desire to contribute to the greater good chime with CAF (and more specifically combat arms) values?

- Would the TG be more open/amenable to pursuing a CAF/combat arms career if they were (more) aware of the number of females in the Canadian military, the desire to reach 25% female membership by 2026, and the extent to which females contribute to a more operationally effective, cohesive armed forces?

Respondent Recruitment

Respondent recruitment for this research was outsourced to CRC Research. They were provided with a recruitment screener, a consent form, the interview location and the interview dates to make appointments for respondents. The following recruitment screener was used:

We are looking for young, active women to participate in a one on one interview on October 9th between 9am and 10pm at EKOS research, located in Suite 101 at 359 Kent Street in Ottawa. The topic for the interviews is career aspirations; career options people have considered and why, and what their ideal career looks like. The research will be conducted by trainees on a course who are learning about interview skills and analysis, and the interview will take 45-50 minutes. We will also offer you \$100,- for your time. We conduct this kind of training the world over, and most participants say they really enjoy taking part in one of our interviews!

To assess if you qualify for our research please fill out the attached screener.

- What gender do you identify with?
 - Male – reject
 - Female – accept
 - Other – reject
 - Prefer not to say – reject

- What is your age?
 - 15 or below – reject
 - 16 to 25 – accept
 - 26 to 35 – reject
 - 36 to 45 – reject
 - 46 to 55 – reject
 - 56 to 65 – reject
 - 66 or over – reject

- Do you participate in any routine active physical fitness activity? (for example, team sports, running, swimming, regular gym attendance, martial arts, yoga... etcetera?)
 - Yes – accept
 - No – reject

- How often do you engage in routine active physical fitness activity?
 - Less than once a week – reject
 - Once a week – reject
 - Twice a week – accept

- Three times a week – accept
- Four times a week or more – accept
- Do you consider yourself to be generally in good health?
 - Yes – accept
 - No – reject
- Do you consider yourself capable of a rigorous physical job?
 - Yes – accept
 - No – reject
- Do you take any illicit drugs?
 - Yes – reject
 - No – accept
- Are you either a landed immigrant or a Canadian citizen?
 - Yes – accept
 - No – reject
- Do you have a criminal record for which you have not been pardoned?
 - Yes – reject
 - No – accept
- Are you currently in, or have you passed, high school grade 10 or secondary IV (Quebec)?
 - Yes – accept
 - No – reject
- Are you currently, or have you been in the Canadian Armed Forces?
 - Yes – reject
 - No – accept

Sample Description

Round 1 research consisted of 9 interviews with the following sample characteristics:

Interview number	Gender	Age	Occupation	Location
1910090900	Female	23	Student	Ottawa
1910091000	Female	18	Student	Ottawa
1910091100	Female	19	Student	Ottawa
1910091200	Female	23	Student	Ottawa
1910091400	Female	24	Student	Ottawa
1910091500	Female	19	Student	Ottawa

1910091700	Female	22	Teaching Assistant	Ottawa
1910092000	Female	23	Social Media Worker	Ottawa
1910092100	Female	24	Laboratory Assistant	Ottawa

Table 3: Round 1 sample description

Round 1 interviews were analysed, on the basis of which the second interview guide was developed - as described above. Round 2 research consisted of a further 13 interviews with the following respondents:

Interview number	Gender	Age	Occupation	Location
1910280900	Female	19	Student	Ottawa
1910281000	Female	21	Waitress	Ottawa
1910281100	Female	24	Financial Advisor	Ottawa
1910281200	Female	18	Student	Ottawa
1910281300	Female	22	Graphic Designer	Ottawa
1910281400	Female	18	Student	Ottawa
1910281500	Female	16	Student	Ottawa
1910281600	Female	16	Student	Ottawa
1910281700	Female	16	Student	Ottawa
1910281800	Female	18	Photographer	Ottawa
1910281900	Female	17	Student	Ottawa
1910092000	Female	24	Student	Ottawa
1910092100	Female	20	Actress	Ottawa

Table 4: Round 2 sample description

Ethical Considerations

All research was conducted in an ethical manner that conformed to standard practices in social science research. In particular the following were adhered to:

- All participants provided entirely voluntary informed consent
- In all instances the participants were provided with a satisfactory explanation of the study's aims and what their participation would involve
- Participants were allowed to withdraw from the study at any time
- All participants were guaranteed absolute confidentiality
- All methods were non-invasive and non-harmful
- All researchers were polite and non-threatening
- All researchers avoided asking sensitive questions

Focus Group Discussion

A focus group was conducted in the final week of the training course. Once all of the one-on-one in-depth interviews were completed and analysed it was decided that an additional Focus Group would be highly beneficial, for several reasons: First, some research questions needed further clarification and exploration, and a discussion scenario with the TG was deemed best suited to providing new information; second, it was felt that the social nature of a focus group would allow female respondents to be more open in their answers about sensitive issues surrounding the Canadian army; and, third, ideas generated by the trainees regarding the behaviour change approach and intervention functions could be tested with the specific TG to whom they should appeal.

The Focus Group Interview Guide is included in Appendix G. The following themes provided the foundation for the focus group discussion questions:

- Exploring what kind of imagery relevant to female careers and roles in society was most appealing
- The role of the Canadian army and knowledge of its role by the TG
- The positive role of women in the CAF
- The recruitment process and its lack of resonance with the TG
- Binary categorisation of concepts relevant to civilian and military careers
- The use of force and the handling of weapons
- The social- and self-identity of the TG and whether that fits with CAF identity
- The ethical and moral views of the TG
- The risks and related concerns about being a female combat soldier
- Mental strength and female empowerment

Qualitative Analysis

Qualitative data analysis is the range of processes and procedures whereby the qualitative data that has been collected is formed into some kind of explanation, understanding or interpretation of the people and situations being investigated. The process tries to make sense of large amounts of textual data transcribed from the interviews. The process is inherently interpretative, and iterative, moving from a naive interpretation to a robust one. The analytical and critical skills of the researcher play a significant role in qualitative data analysis. There are several different approaches that can be taken - the Live Case Study relied on interpretative phenomenological analysis and thematic analysis.

Interpretative Phenomenological Analysis is an approach to psychological qualitative research with an idiographic focus, which means that it aims to offer insights into how a given person, in a given context, makes sense of a given phenomenon. Thematic Analysis is one of the most common forms of analysis within qualitative research. It emphasises identifying, analysing and interpreting patterns of meaning (or "themes") within qualitative data. In order to facilitate this process, the BDM approach to qualitative analysis applies *a priori* 'coding' labels - derived from the Factors and Parameters - to enable a robust, yet relatively fast, cross-sectional analysis across multiple sources of text data.

The process occurs over two cycles of coding, termed first cycle coding and second cycle coding. First cycle coding involves the labelling and sorting of the data. It begins with familiarisation of the texts, and then identifies a set of themes for the initial organisation of the data by relating words, phrases and quotes to Factors. That data is then organised in a spreadsheet. Second cycle coding involves abstraction and interpretation of the selected data. The process teases out more analytical concepts and themes, looking for patterns of meaning - these are primarily related to Parameters. The codes form a shared classification system designed to group data that are similar.

Figure 8 displays a truncated example of a coding spreadsheet. All interview transcripts were double coded in pairs of trainee researchers, and then each coding spreadsheet was cross-checked by another researcher pair to ensure rigour and increase validity. The training team also checked large sample sections of the coding to ensure its accuracy.

Figure 8. A truncated example of a coding spreadsheet created by the BDM course trainees.

Semiotics

Semiotics was introduced as an additional insight gathering aspect to the course for trainees to consider. It was not an intrinsic element of the course and trainees were not tasked with exercises or expected to complete any testing on the subject. It was a supplementary framework to aid the research.

Trainees were presented with workshops in week one and two of the course. This aimed to ensure the basics of semiotic analysis and decoding were established and understood. As the workshop materials presented were prepared in advance of the course, they were on a different subject matter to the one that was ultimately selected as the coursework subject/objective on day one (visible minority representation in Canadian culture, which changed to the recruitment of women into combat arms roles, irrespective of cultural or ethnic status).

The workshops covered the following important aspects:

The ability to objectively and consciously observe the environment. Semiotic decoding is not a process that always requires deep investigation to find source material. It is the study of the cultural landscape, and so the materials for analysis are usually present in culture.

Trainees were taken through various exercises and demonstrations to help them understand how important subtle sensory differences can be in affecting our perceptions of the subject being viewed. Minor adjustments to the visual language of a communication can have a profound impact upon our decision-making and this was explored in the group.

This establishes the importance of cultural context as an influence on data-derived insights. Through interviews or questionnaires it is possible to understand how people feel, but the cultural landscape can often provide the context for why they feel that way, and sometimes how

the evolving cultural landscape will affect their feelings or opinions as they become exposed to emergent ideas that they may not yet be anticipating and factoring in to their responses.

Quantitative Research

During Week 5 of the course trainees received several lectures on quantitative research design and analysis. During accompanying workshops for these lectures the trainees - assisted by the course staff - created a short quantitative survey. It was understood that the survey could not be administered to the population at this time because of the Canadian elections period.

The purpose of the quantitative survey is twofold: (1) to collect quantitative data on a large scale that further investigates the qualitative findings and whether or not they generalise to the broader population; and, (2) to test specific relationships in an emerging causal behavioural model of the variables relevant to females joining the Canadian army.

The causal model was developed by one of the students - Dr Suzy Waldman - in collaboration with the course team. The model incorporates elements of existing academic behavioural change models, namely the COM-B model (Mitchie et al., 2011) and the Theory of Planned Behaviour (Ajzen, 1991). The model also was yoked to the Factors identified during the PSM process and to the qualitative findings of the Round 1 interviews. The Live Case Study causal model is shown below in Figure 9.

The causal model was used to guide and enable the generation of relevant survey items (questions or statements). Items for the survey were generated in syndicate groups, with a total of 67 items generated between the four syndicates. With the assistance of the training team, the best items were then refined and organised to create a high-quality survey. The finished survey is in Appendix F.

The survey was designed to test the following variables: awareness of army careers; active interest in an army career; attractiveness of an army career; perceptions of the army; physical ability to join the army, and self-perceptions of that physical ability; awareness of the options for females in the army; and the social identity of potential female recruits.

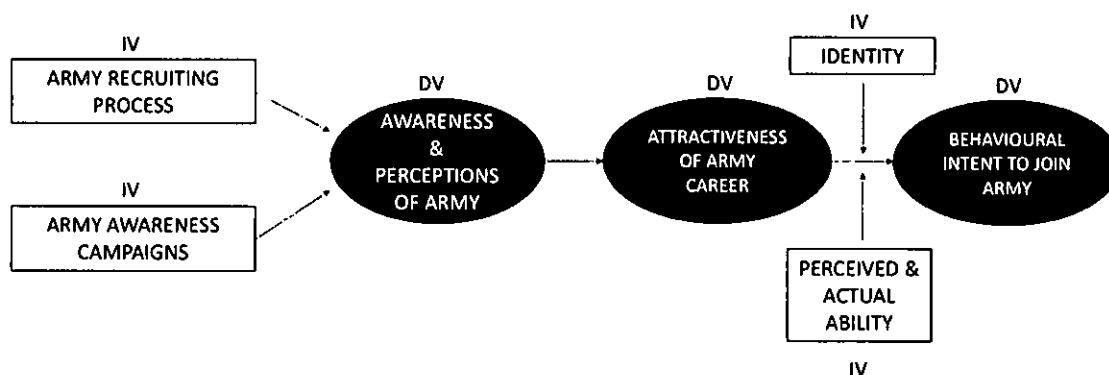


Figure 9: Live Case Study Causal Model. IV refers to independent variable, and DV refers to dependent variable.

Campaign Intervention Strategy (CIS)

The Campaign Intervention Strategy Phase is the process of determining, based on evidence, what kind of behavioural strategy might be effective in changing the behaviour of the chosen Target Group(s).

The BDM Campaign Intervention Strategy model (see Figure 10 below) represents the stages that are worked through in order to derive an appropriate intervention strategy. First, based on AAA Parameter data, the relevant determinants of specific behaviours are identified; then, second, a suitable intervention function is selected that will help enable behaviour change. Lastly, the selected intervention function(s) is/are implemented by utilising the Transformative Parameters.

Determinants are assumed causal antecedents of behaviour and are supported by empirical and theoretical evidence from the academic social science literature. Behaviour change methods try to change behaviour by trying to change one or more determinants. For example, a group might need to be motivated to carry out a target behaviour, or a barrier may need to be removed to facilitate a particular behavioural pathway. Appropriate determinants can be identified from the AAA data to select which behavioural components are fundamental to creating change within the target group.

Intervention Functions are theory-based general techniques or processes that have been empirically shown to be able to change one or more determinants of behaviour. The methods have their origins in behavioural and social science theories. For each intervention function the theory explains how the mechanism works, and thus why we can expect a causal link between the method of change and measurable behaviour change.

Once the qualitative data analysis of the two rounds of interviews was completed, the AAA data was studied alongside the BDM CIS model. Syndicates first worked on identifying which determinants of the Target Group's behaviour needed to change in order to enable behaviour change to take place. Having identified the relevant and necessary determinants of behaviour change, the determinants were matched to appropriate intervention functions so that viable behaviour change programmes could be suggested. The validity and relevance of the selected determinants and intervention functions were further tested during the focus group discussion (see above for details). The determinants and intervention functions findings are presented in Section 8 below.

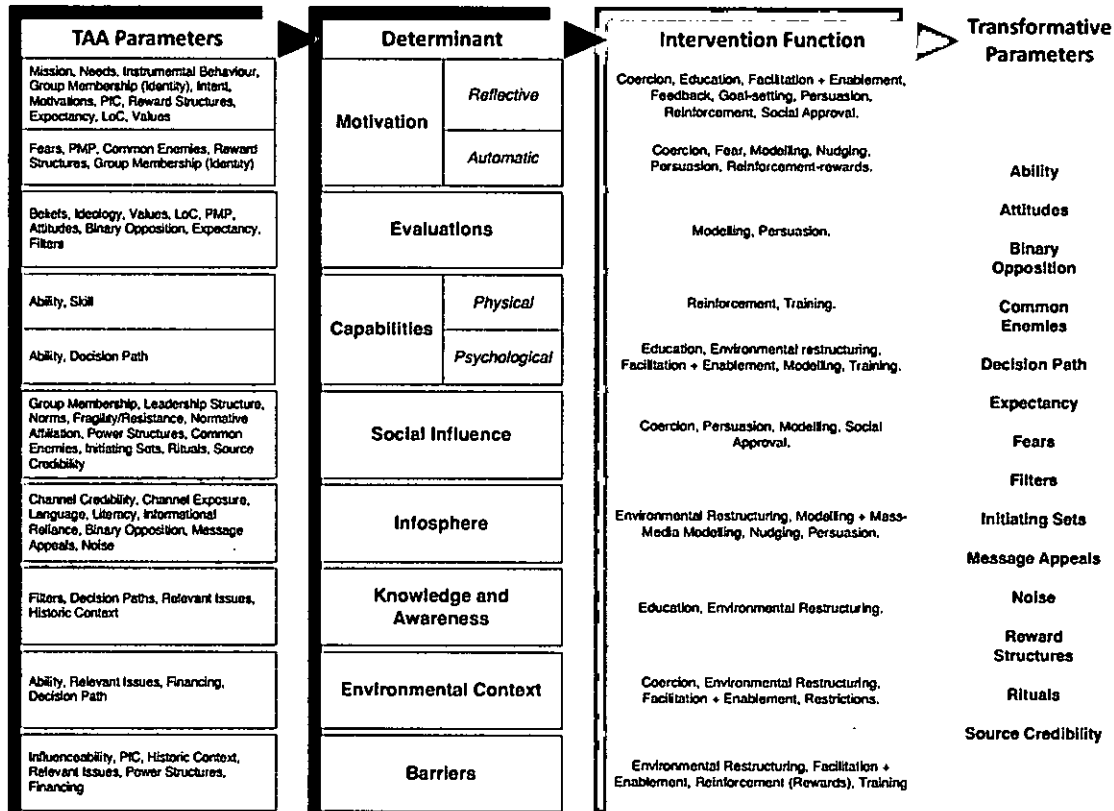


Figure 10. BDM Campaign Intervention Strategy model.

Measurements of Effectiveness (MOE)

MOE is the process of evaluating the effectiveness of a behaviour change campaign. Setting the right Measurable Behavioural Objective(s) (MBOs) by which the success of a campaign can be measured is important, and should be done as early as possible in the research process.

An MBO should be SMART (Specific, Measurable, Achievable, Relevant and Time Oriented). For the recruitment of women into combat roles, it is important to decide whether an MBO should focus on applications received, the number of women passing the required training, the number of women starting in their actual position, and any other metrics out of a large number of possibilities. The use of absolute numbers versus percentages, and the comparison to male recruits are also important considerations.

The trainees learned to work with the BDM MOE model (see Figure 4 in Section 5 of this report) and in syndicates they applied the model to the Live Case Study.

Actual evaluation spreadsheets are quite complex; very precise metrics need to be set and it is important to clarify how the metrics relate to each other and how success scores are ultimately calculated. This process involves an assessment of the already available data and how this is produced (and in what time periods this is made available), an assessment of the data that is lacking in the calculation of MBOs and how this may be obtained (whether through a different calculation of existing data or through the collection of new data and if so, how), and a series of decisions on how various metrics will be used together.

The trainees worked through the theory of setting good evaluation indicators, an example (not legible) of which would look like this:

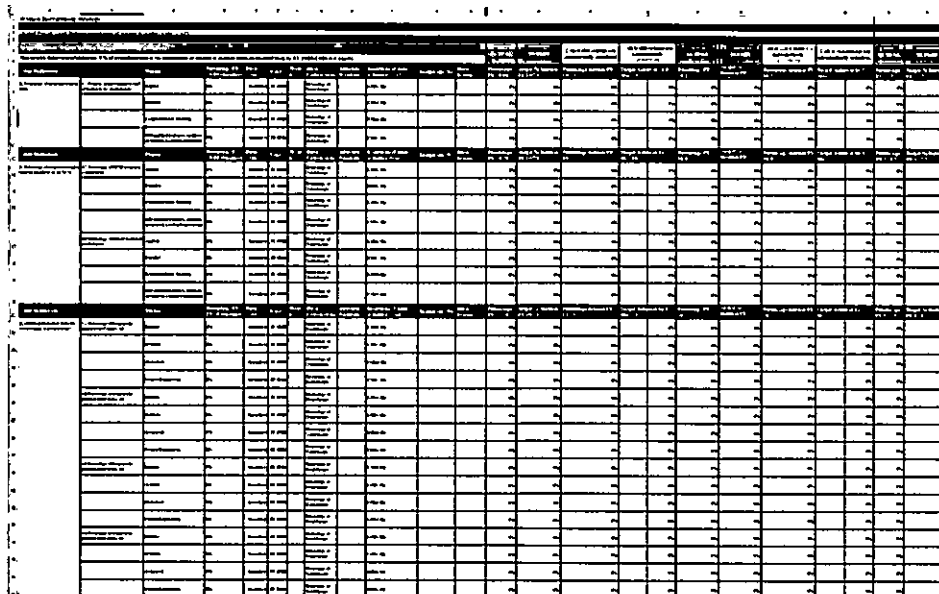
The image shows a highly detailed and complex spreadsheet used for evaluation. It features a grid with numerous columns and rows. The columns are organized into several distinct sections, likely representing different stages of the evaluation process or different metrics. The rows contain a large amount of data, which is mostly illegible due to the small font size and high resolution of the scan. The overall structure suggests a multi-layered data collection and analysis tool.

Figure 11: an evaluation spreadsheet for the Live Case Study produced by trainees in syndicates.

A good MBO for the recruitment of women into the combat arms would be a realistic increase based on:

- Year on year increase realised over the past 5 to 10 years.
- Campaign budget fluctuations over those 5 to 10 years and relative budget for the upcoming year (for example, if the campaign budget has fluctuated but the outcomes have not, this is important in and of itself, and of course when the campaign budget will remain stable, it is unrealistic to expect a drastic increase in recruitment next year if the same channels are used).
- Effects that past changes in campaign messaging, use of channels and recruitment methods have had on recruitment figures.
- Expected success of proposed campaign changes based on research.

Of course, campaigns can improve drastically based on good behavioural audience research, yet any campaign (of this nature) is part dependent on the human and financial capital invested and this is an important consideration when setting campaign objectives.

On the basis of their reviews of DBR, SME interviews and group discussions, trainees ascertained that a good Measurable Behavioural Objective for the Live Case Study would be:

A 2% increase in the recruitment of women in combat arms, at the OFP level by FY 2025-2026 in Canada.

This MBO may not per se be desirable and a higher percentage increase might be possible; the point here is that trainees learned how to set realistic MBOs considering available data and the availability of resources and time.

Once an MBO is set, it is important to consider how it will be measured. These metrics are called Direct Indicators, for example by looking at:

- The percentage of NCM women in combat arms (tracking the number of women who have applied, enrolled, have completed basic training and are OFP qualified)
- The percentage of female Officers in combat arms (tracking the number of women who have applied, enrolled, have completed basic training and are OFP qualified)

MBOs should be measurable irrespective of campaigns.

Campaigns each have their own objectives for the Target Audience (called Audience Based Objectives or ABOs), which should be in aid of achieving the MBO(s).

For example, a campaign may advertise career opportunities within the CAF - and notably combat arms -to young women with a call to action for them to visit a recruitment center for more information.

One of the indicators of success of this campaign would of course be an increase in the number of young women who visit recruitment centers for more information about a career in the CAF.

ABO	Direct Indicator	Baseline	Data Type	Year	Data Calculation	Data Source	Target increase %	Actual
Increase in the number of women seeking information about a career in the CAF and specifically ask about combat roles	Number of women seeking information about a career in the combat arms in a CAF recruitment centre	Absolute current number per year (quarter / month)	Secondary Internal Database	F/Y 19/20	Compiled data from recruitment centers	Recruitment Centers	Set year on year desired increase	Actual number at end of F/Y

Table 5: Example of an ABO indicator for the recruitment of women into the Combat Arms

Evaluation is complex, and the examples given here are quite simple. The assumption is that there is a large database in existence at CAF that already tracks this type of data, and thus the emphasis was on the trainees' understanding of evaluation and how to think through setting good indicators and measuring them, versus creating an actual framework (which would require an understanding of exactly what data is available and in what format).

7. Qualitative Research Findings

Findings: Snapshot

Over two rounds of qualitative research and one focus group a generic portrait of the Target Group emerged. Broadly, the TG have little awareness (see Factor 1; F1) of the Canadian Armed Forces and even less of a concrete idea about the combat arms component(s). The awareness they do have tends to come from family and friends who have military experience and from school events, such as job fairs and career days. “Official” messages (F9) such as CAF advertising tend to lack resonance, get filtered out, or simply go unseen, despite the TG having generally favourable perceptions of the CAF (F6), particularly where humanitarian efforts are concerned.

The TG has a number of concerns when it comes to a career in the army. They are concerned about the psychological and physical risks (F5) associated with a career in the combat arms. They are concerned about handling firearms, and they are concerned about their own athletic abilities (F4/F10) - despite the TG’s actual physical abilities being greater than their perceived abilities.

Perhaps most crucially, they are concerned that joining the CAF, particularly in a combat role, compromises themselves. Despite not facing any particular social obstacles that they can’t hurdle (F2), there is a feeling that such a career doesn’t afford them their desired lifestyle (F3) nor does it mesh successfully with their identity in the world (F7).

A more detailed examination of these Findings is included below.

Findings: Round 1 Interviews

Factor 1: Awareness. The awareness of the opportunity for Canadian females aged 16-25 (the Target Group; TG) to join the CAF in a combat capacity.

Finding: There is a general lack of awareness concerning the Canadian Armed Forces - and particularly the combat arms - among the Target Group.

Description of Finding: Interviewees tended to know very little about the CAF (and even less about the combat arms) and there was a strong sense of being disinterested and/or unengaged. Even though some members of the TG had friends who were enrolled in and/or had greater awareness of the CAF/combat arms, their knowledge of the workings of, and opportunities within, the CAF/combat arms were (mostly) vague-to-non-existent.

“I know someone who’s going into the forces as an engineer ... I know there’s kind of those desk jobs but I’m not sure what the front line looks like ... my impression is fighting and wars and more things like that.” - Female, 24, Student, Ottawa

“I know a bit, again from other people. I know you can be a soldier in the Marines, aviation, that kind of stuff. You can also be a doctor, mechanic, [an] engineer. I know there’s a lot of career opportunities but it’s not like I ever looked into [it], so I don’t really know the details - but there are a lot of options.” - Female, 19, Student, Ottawa

“I guess the news explains some stuff sometimes [about the CAF] ... it’s usually online. Yeah, like on Twitter?” - Female, 18, Student, Ottawa

“I guess [a combat role] is a physical role - facing something that is a physical challenge.” - Female, 23, Student, Ottawa

“[A CAF career] Is just not something I’ve found any interest in ... [If information was available] maybe if I, like, found something that did interest me.” - Female, 18, Student, Ottawa

“(Interest in what they were doing [in the CAF])? Maybe, that’s a tough one. I was liking the idea of what they were doing ... representing the country in a different way.” - Female, 23, Student, Ottawa

“So I stay updated [with friends/acquaintances in the CAF] the most through social media, so you know they are going through their basic training ... it looks like something they are proud of.” - Female, 19, Student, Ottawa

Factor 2: Social barriers. The social barriers that may deter or inhibit the TG from seeking a CAF combat career.

Finding: Few interviewees highlighted specific social barriers that would definitely preclude them joining the CAF/combat arms or more male-dominated careers.

Description of Finding: Although one or two respondents touched upon their family or peer group being “surprised” or, in one instance, unsupportive if they were to join the Canadian military, the majority were keen to point out that they did not feel excluded from nor feel daunted by, either socially or otherwise, what could be considered career paths traditionally explored by males.

“I don’t think I had problems going in and it might be different at different bases with different groups of people but I felt zero judgement from day one or day zero, no “Oh, you’re a female so you can’t do it.” - Female, 24, Laboratory Assistant, Ottawa.

“I don’t think engineering or comp-sci is more geared towards men. I think these are really old ideas that were [...] pushed onto people in the past but I think in this age of 2019, I don’t see that.” - Female, 23, Social Media Worker, Ottawa

“My parents would be against it [joining CAF] ... My mom and my dad would be like, “It’s very tough for you.” - Female, 23, Student, Ottawa

“Some people get a bit nervous [about her working in what could be considered a ‘risky’ more male-dominated profession - correctional services].” - Female, 23, Student, Ottawa

Factor 3: Attractiveness of CAF career. The extent to which the TG considers the CAF an attractive career path - both in itself, and compared with other career opportunities.

Finding: There was low-level attractiveness among the interviewees for careers in the CAF on a personal level (although mostly the TG were supportive of the CAF as an institution).

Description of Finding: The absence of attractiveness in a CAF career may be aligned with the bulk of interviewees deciding on their career paths very early in their lives and a military career simply not being on their radar. There was also discontent voiced surrounding the physical and psychological attractiveness of a CAF career among many respondents.

“I’m not as interested in joining the military ... I’ve thought a bit about it but not into it, I think more on the civilian side of it, helping out, maybe doing mountain search and rescue. It’s super, super structured and all about subordinates and stuff.” - Female, 24, Laboratory Assistant, Ottawa

“[when asked about whether considered joining the CAF] Absolutely not ... definitely not for me - like I said, as much as I value a career, I still want, like, a normal quote-unquote home life and I don’t feel the military would have supported that.” - Female, 19, Student, Ottawa

“[the army is] Physically and mentally dangerous at the same time.” - Female, 23, Student, Ottawa

“When I got into university I was pretty set I wasn’t going to do something frontline like that.” - Female, 23, Student, Ottawa

“I picked up a buddy who dropped out ... it was definitely not the physical aspect [which caused him to leave] ... he was tough mentally, too. I think he was just really lost and didn’t know what he wanted to do. I didn’t see him in there trying to figure it out, I suppose.” - Female, 24, Student, Ottawa

Factor 4: Ability. The mental and physical ability of the TG to enable them to join CAF in a combat role.

Finding: Many of the TG felt that they didn’t have the ability (mental and/or physical) to pursue a career in the CAF/combat arms.

Description of Finding: On the whole, interviewees tended to feel unable to cope with what they saw as the rigours of the CAF - on a physical, psychological or emotional level. There was a general sense that the respondents felt “unsuitable” for a career in the Canadian military.

“Dealing with those in conflict in war-torn countries, it’s just too much for me. I know it’s like going on and stuff but I don’t think I could actively be a part of it.” - Female, 19, Student, Ottawa

“It [CAF/CA] takes a certain quality that I don’t know how to pin down to be able to endure something like that and ... I’m just not interested in having to do that.” - Female, 19, Student, Ottawa

“Being in the military, doing military drills ... women just can’t keep up [although it’s] the same distance, same everything ... ” - Female, 23, Social Media Worker, Ottawa

“I think they [combat arms personnel] need to be super strong. You have to be able to run at any moment, go through tough training at any moment.” - Female, 23, Social Media Worker, Ottawa

“When I think of the army I think of people probably a lot more fit than I am...a lot more focussed and disciplined ... they follow the rules a lot more strictly.” - Female, 23, Student, Ottawa

“Also the mentality of knowing you could die at any second and you’re basically going into battle and I think it’s a really hard thing to get over ... everyone has a limit.” - Female, 24, Laboratory Assistant, Ottawa

“[A mental challenge of combat would be] probably just knowing a bunch of information and not being able to tell anyone or really help anyone in any way.” - Female, 18, Student, Ottawa

“It is both a physically and mentally demanding type job. Obviously you have to pass a bunch of physical tests and be in very good physical shape.” - Female, 19, Student, Ottawa

Factor 5: Anticipated risk. The TG’s perceived risks - sexual, physical, psychological - and dangers of joining CAF.

Finding: A number of interviewees expressed concern about the potential risks of joining the Canadian Armed Forces.

Description of Finding: The bulk of interviewees considered that joining the CAF/combat arms was a dangerous pursuit, with many highlighting the physical and psychological risks and one respondent highlighting the risks of (potential) sexual assault/harassment.

“I feel the risk taking on a job like that [in the CAF] is more than I would personally want to take on in my life.” - Female, 19, Student, Ottawa

“Body/mind are so related ... if your body’s not feeling great then you’re not going to feel great either. And especially in those professions like in the army, fireman, policeman, like you see some traumatising things.” - Female, 23, Social Media Worker, Ottawa

“I know I have seen stories of sexual misconduct from male military on female military. Those stories were from the States but I’m sure it’s happening here too.” - Female, 19, Student, Ottawa

Factor 6: Perceptions of CAF. The general (societal) and specific (TG) perceptions and attitudes of the CAF.

Finding: Perceptions of the CAF were broadly neutral/positive, but the CAF is not considered suitable for the interviewees as a career choice.

Description of Finding: Female membership in the CAF was looked upon favourably by nearly all respondents (“So if you tell me you’re from the army I won’t be like, “You suck” I’m going to be like, “Oh my god, you can do 20 push ups in a row? I can’t do that,” -interviewee to female interviewer and current CAF member) but many just felt the organisation “wasn’t right” for them. The interviewees were mostly supportive of the Canadian Forces although one or two did express negative perceptions about the CAF specifically and more interviewees still had negative perceptions of military organisations in general.

“Canadians (CAF) are like NATO, right? So that bombing really kind of brought us here ... I couldn’t support something like that.” - Female, 23, Social Media Worker, Ottawa

“I guess my perceptions of the military are from what I’ve seen in the movies and stuff but it’s like everyone has their role and like you never go above it or anything ... you might be asked to step up and do this which I’m sure happens in the military. Your bed has to be perfectly made and your shoes shine and it’s like: stand perfectly. If anything’s off you get yelled at or something.” - Female, 24, Laboratory Assistant, Ottawa

“I think the idea of basic training turned me off a little bit. I know lots of people who have completed it and lots who have dropped out ... and the people who have dropped out, I think, ‘If they dropped out could I, you know, do it?’” - Female, 24, Student, Ottawa

“I think my introduction to military was through school, through history, war was like, very grim, very intense, very unsafe, and I think because that was my initial introduction and what I learned ... I’m, like, stuck like that.” - Female, 19, Student, Ottawa

“Rifle [when interviewee asked what comes to mind when you think of the combat arms] I guess it’s just the image that it portrays, right?” - Female, 19, Student, Ottawa

Factor 7: Identity. The sense of social identity that the TG has (or anticipates having) within CAF, and specifically in a combat role.

Finding: Mostly, roles within the CAF did not chime with what the respondents considered to be their identity.

Description of Finding: In almost all instances there was a distinct lack of cohesion between the identity of the TG and that of what they perceived the CAF identity to be and how their social identity might change in a military environment.

“Like I said before, I wouldn’t want to be in the military.” - Female, 22, Teaching Attendant, Ottawa

“I mean, I like the thought of carrying a weapon but I don’t like the thought of carrying a weapon ... I’m more like a peaceful resolution kind of person.” - Female, 19, Student, Ottawa

“Any armed forces to me are a sign of violence, oppression, genocide - all these things and I kind of don’t really support.” - Female, 23, Social Media Worker, Ottawa

“A girl that’s kind of daring, that wants to kind of take a more male-dominated profession, just to kind of stick it to them, like, ‘Yes, I can do this.’” - Female, 23, Social Media Worker, Ottawa

Factor 8: Recruiting process. The overall effectiveness of the recruiting process – both attracting applicants, and keeping them interested.

Finding: The nature of Factor 8 coupled with our interviewees having no direct experience of CAF-recruitment processes meant this Factor could not be explored further in Round 1 qualitative research

Factor 9: Current campaigns. The effectiveness and resonance of current recruitment/awareness campaigns that CAF produce.

Finding: Current CAF campaigns appear to be (generally) unseen, filtered or not resonating with the TG.

Description of Finding: There was a lack of current recruitment and awareness campaigns having much of an effect among the majority of interviewees and most struggled to recall recent advertising. There was also a feeling that the information that was received was considered unreliable, suspect or unrepresentative of females.

“Not seen ads or anything [for CAF] ... like maybe a while ago but not recently ... military? ... yeah, um [laughs] ... not sure.” - Female, 22, Teaching Attendant, Ottawa

“Whenever I see pictures of a police force, it’s like: men; firefighters: men; army:men - like I haven’t seen a woman in any of those advertisements.” - Female, 23, Social Media Worker, Ottawa

“I’ve seen a few military ads but it’s more like, ‘We’re hiring a cyber-tech. Apply now. Here’s your application.’ Like I saw that one. Or just like, ‘Join the Forces’ and it’s just like a group of like, boots or whatever, the pants. But I think, ‘I really wish I was seeing more videos.’” - Female, 24, Laboratory Assistant, Ottawa

“I feel [military ads] are a little too positive. It’s like, ‘We’re going to come and train you, it’s going to be great!’ it’s just like a super positive thing and I’m sure there are some super positive aspects to it, I just don’t know if it’s an accurate representation of what you’re getting yourself into.” - Female, 19, Student, Ottawa

Exceptions to this finding may be linked to having personal contact with CAF members, exemplified by one interviewee who spoke to a CAF member in her gym:

“I did have a customer [from the CAF] who came into the gym and he was like, ‘Wow, you look really fit. Would you ever consider applying? We’re doing all this for hiring, especially women’ ... I checked the website and it was pretty cool.” - Female, 24, Laboratory Assistant, Ottawa

Factor 10. Self-efficacy beliefs. The extent to which the TG feel they have the ability to meet the challenge of a CAF combat role.

Finding: There was a general feeling among the TG that they lacked the ability to meet the challenges of a CAF career.

Description of Finding: Despite all interviewees being physically fit and active, in large part they did not feel that they had the ability - physical, psychological, emotional - to meet CAF requirements, in many instances because their aspirations, goals, values and beliefs did not line up with the Canadian Armed Forces’.

“So I think that would be a very big adjustment. Not to say that I don’t think ... like if I really set my mind to it I feel like I could do it, I just don’t know if I would have the mental strength to set my mind to actually accomplish the physical aspect of things because I’m not super invested in that and so would probably just give up.” - Female, 19, Student, Ottawa

“I don’t think I’m as intense [as a military woman] ... I think I’m a little more bubbly.” - Female, 24, Laboratory Assistant, Ottawa

“I don’t think I could commit myself to going to the gym everyday to make sure I’m strong enough to carry people out of places.” - Female, 19, Student, Ottawa

Findings: Round 2 Interviews

Factor 1: Awareness. The awareness of the opportunity for Canadian females aged 16-25 (the Target Group; TG) to join the CAF in a combat capacity.

Finding: Interviewees had a (generally) limited awareness of the CAF and the opportunity to join in a combat capacity wasn’t something that appeared to be on the Target Group’s radar.

Description of Finding: The bulk of interviewees had a somewhat woolly knowledge of the Canadian military, even when they knew people within (or closely aligned to) the organisation. There was some awareness of the variety of roles available with the CAF but very little knowledge of the combat arms - confirming and solidifying the Findings from the first round of qualitative research.

[What kinds of jobs do you know about that are in the military?] “The cook-y thing ... personal cooks? The person who recruits the military people to the workplace ... The people who make the clothing.” - Female, 16, Student, Ottawa

[Have you heard of the combat arms?] “No, I don’t think so. No. My exposure to the Canadian Armed Forces is very minimal.” - Female, 18, Student, Ottawa

[When asked if she knew what the combat arms is] “Not really, like, I can probably assume, but I don’t know exactly what it is.” - Female, 19, Student, Ottawa

“I knew a couple of people in the Reserves and then they had recruiters come to our school and do presentations like they do and that definitely peaked my interest.” - Female, 18, Student, Ottawa

[What in general do you know about the CAF] “Um, I don’t know a ton about them. I know there’s a bunch of different jobs you can do. I know, like, one of my friends’ parents both work at National Defence. They just have like office jobs, they’re working, but, um, so I know there’s tons of different things you can do. I have friends that are also going through like training to be in the military and they were in I don’t remember where he was ... he’s stationed now. I think in Petawawa, he’s doing stuff there. Um, I know they do stuff overseas ... I don’t really know that much.” - Female, 20, Photographer, Ottawa

“My Dad works on a military base but he’s like [a] navigation technician ... but I don’t have a lot of experience. I know one guy from highschool went to the military but I don’t have a lot [of knowledge]. I know there’s basic desk jobs and I know there’s, like, training. I know it’s not all fighting because I know military gets released for, like, climate issues when there are floods, so they do help communities in that sense. When there’s, like, fires when people need to be evacuated, I know they do that.” - Female, 24, Student, Ottawa

Factor 2: Social barriers. The social barriers that may deter or inhibit the TG from seeking a CAF combat career.

Finding: Social barriers were not particularly keenly felt and/or highlighted but in some instances cultural identities further compounded gender as a social barrier to joining the CAF

Description of Finding: There were some instances of family history having a strong impact on familial support for joining high-risk occupations, particularly where the military are concerned. This is especially apparent when considering families originating from areas with a higher degree of political unrest. Current sample size and composition is limited in this regard and additional research with more diverse/appropriate sample size(s) may be required to solidify or refute these findings.

[in response to being asked if there were any social barriers to joining the CAF] “No. I see it can be more like, an ego barrier ... but I believe that we can overcome any barrier.” - Female, 16, Student, Ottawa

“I had three brothers and I went home and I told them I was thinking of doing this [joining the army] and they all, like, laughed at me.” - Female, 18, Student, Ottawa

[In response to a hypothetical question about joining the CAF] “My mom might not like it that much. My brothers might have their concerns but they both wanted to join the

military at some point in their lives so they might say, 'Good for you.' My friends would probably look at me like I have two heads. My friends know that's something I would not do." - Female, 21, Waitress, Ottawa

"[...] my parents came from Serbia as refugees because of the wars. They would be, like, 'What are you doing in the military? What are you going to be doing?' They've seen war first hand, so they don't want me to get hurt." - Female, 24, Student, Ottawa

Factor 3: Attractiveness of CAF career. The extent to which the TG consider the CAF an attractive career path - both in itself, and compared with other career opportunities.

Finding: Some interviewees were (somewhat) aware of the various careers within the Canadian Armed Forces they had little-to-no interest in pursuing these opportunities.

Description of Finding: While some respondents had a basic knowledge of career opportunities within the CAF - mostly through high school job fairs and/or having family, friends or acquaintances with military experience - it was considered an uninteresting, unattractive or hardly-considered career option. Desirability towards joining the CAF increased when respondents were made aware of the Reservist component and the possibility of having a part-time military career.

"I don't think [many women will want to join the combat arms] because the military is kind of associated with violence, and women don't necessarily want to be associated with violence." - Female, 18, Student, Ottawa

[when asked about the attractiveness of the Reserve Force] "Absolutely! Yeah! Well, you have a really good work life balance. You only work two days a week, it won't affect your family much because you don't have to leave them. And I feel like if you're in your own country, you're not actively fighting in a war, so your safety is basically what it would be in any other job ... if I were to commit to the army full-time it's a serious commitment ... so I like the flexibility [of the Reserves] and that I don't have to go on the work trip but I could if it's at the right time and I'm interested." - Female, 22, Graphic Designer, Ottawa

"I think it's a good thing [recruiting more females into the combat arms]. First of all, it's very important, just because I think it would, like, dismantle a certain image that it's like very male-dominated or it's meant that men have a certain persona or are physically stronger. Like I know there's some scientific, and there's some biology as well, but it shouldn't be a distinction factor to discriminate or get women not to be involved where they, like, question their capabilities, so I think it's really good that they're trying to reinforce that." - Female, 18, Student, Ottawa

"I thought that there were [part-time opportunities in the CAF] but I wasn't certain; yeah I would [see myself joining] 'cause, I don't know, it sounds like fun." - Female, 16, Student, Ottawa

[Why would the Reservists appeal to your friends?] “I think it’s good to have a balance. I know that I would like that a lot. And not that it feels like less of a commitment but you’re not away for as long. So that’s something that I like as well.” - Female, 20, Photographer, Ottawa

Factor 4: Ability. The mental and physical ability of the TG to enable them to join CAF in a combat role.

Finding: Perceptions surrounding physical ability and what it takes to join the CAF/combat arms were greater among the interviewees in Round 2 research than in Round 1.

Description of Finding: Over half the participants said they could complete the FORCE test after seeing the video, with many of them saying they thought a couple or more of their friends could also complete the FORCE test. This Finding suggests that if a potential barrier to enrolment and/or showing interest in joining the combat arms is perceived lack of ability, then that barrier is surmountable if using the right message/campaign.

“It seems kind of easy, honestly, I thought it would be a lot more like physically demanding. But I guess the acts themselves make a lot of sense. So like, when you're dragging like the sandbags or whatever, like, I guess, it makes sense to like, you know, you might have to drag like, I guess, if you're feeling sand, makes like a flood like it's stuff that makes sense for certain context. So in that I understand it, but I thought it would be more physically demanding.” - Female, 19, Student, Ottawa

“Yeah” [With my current level of fitness, I think I could complete the tasks of the FORCE test]. - Female, 21, Waitress, Ottawa

[When asked if she could do the FORCE test after being shown a video of the tasks] “Yes, but not like consecutively back to back with no rest. [laughter] Probably.” - Female, 24, Financial Advisor, Ottawa

“I could do the exercises in the video, yeah, yeah. It was not difficult because currently I’m on strength development, so with enough practice lifting we could definitely do that.” - Female, 18, Student, Ottawa

Finding: Some of the TG said they or their peer group do not have the psychological or emotional ability to work in the CAF.

Description of Finding: A few respondents have expressed an inability to work in the CAF, especially with regards to wearing a uniform and/or using a firearm or force. One respondent did express that women writ-large do not want to be associated with violence and are therefore much less likely to join the CAF, especially the combat arms component(s).

[going back to the weapons concern, the respondent was asked if she was ok with it] “No, no I’m not. I just ... uh don’t like it. I haven’t actually tried to use a weapon so I don’t know, but the concept of it is just against my personal beliefs. I just think that if we discuss things with other people we can usually solve more things than we can [by] shooting.” - Female, 24, Financial Advisor, Ottawa

“I don’t think [that many women will want to join combat arms] because the military is kind of associated with violence, and women don’t necessarily want to be associated with violence.” - Female, 18, Student, Ottawa

Factor 5: Anticipated risk. The TG’s perceived risks - sexual, physical, psychological - and dangers of joining CAF.

Finding: Round 2 confirmed round 1 Findings, namely that respondents considered the CAF to be a high-risk profession.

Description of Finding: Concern was expressed at the psychological, emotional and physical risks associated with a career in the Canadian military - particularly within the Combat Arms. The risk of sexual harassment or sexual assault was only raised by one respondent and with reference to the wider society, not CAF-specific. Short of explicit prompting, the discussion should have enabled this topic to arise organically if it was of prominent concern to the TG. This is an unexpected finding, as it was conjectured that perceived risk of inappropriate sexual conduct would be a barrier for the TG.

“Every day is a risk ... when you’re in an active, like, war zone or a country, like, that I think it’s a risk, you don’t know what could happen.” - Female, 22, Graphic Designer, Ottawa

[Why couldn’t you see yourself joining the military?] “I don’t know, it just seems like a lot of emotional stress, it seems really hard.” - Female, 20, Photographer, Ottawa

“Yeah, I think the risk is a huge factor, because when you are in the military, you could even ... if you’re in a support position, really doing something like payroll or [being a] secretary, you could get deployed to wherever.” - Female, 24, Financial Advisor, Ottawa

“From my basic understanding it’s always a risk doing those [combat arms] tasks. It’s not often - like you said, a variety - but most of it is very physically demanding. There could be accidents.” - Female, 18, Student, Ottawa

[combat arms occupations are] “Scary. You’re around big machines that could kill you. So scary, it takes a certain person to do it.” - Female, 17, Student, Ottawa

Factor 6: Perceptions of CAF. The general (societal) and specific (TG) perceptions and attitudes of the CAF.

Finding: Perceptions towards the institution and personnel were typically positive, although perceptions of, and attitudes towards, working within the CAF were typically negative for the Target Group.

Description of Finding: Mostly positive perceptions surrounding the CAF as an institution and positive attitudes towards CAF values, operations and members does not translate into a positive perception of the TG’s suitability for a CAF career. This perception was significantly enhanced, however, once the TG was presented with information regarding a part-time CAF

option (Reservists). There tended to be misconceptions attached to the level of fitness required to join the organisation and these misconceptions became (somewhat) resolved once the TG had seen the FORCE Test video and the actual level of physical fitness required.

“So protecting your country and ensuring honour and bringing honour I don’t think that would be so um out of box for me. So I think if I was in that position, I would be more of the helping kind of, like, behind operations kind of in the background where the frontlines, so kind of contributing.” - Female, 16, Student, Ottawa

“[the Canadian military is] kind of a mess. I know a couple of people that did cadets, for example, and their experiences were not good ... mostly the amount of time they spent doing it and the way people treated them. Which makes sense. Like, for example, the yelling.” - Female, 18, Student, Ottawa

“That’s a good idea [to recruit more women into the CAF] because the only people I know in the army are men.” - Female, 16, Student, Ottawa

“It’s kind of interesting because the way that they’ve perceived the military like when we were younger was like you would never do it by choice. I don’t remember the word is [conscription] but they’re basically like forcing you into it and people don’t want it, but this woman [Lucy scenario] actually works harder so that she can stay in the military and in actively risky countries, so she’s passionate about it.” - Female, 22, Graphic Designer, Ottawa

“Well I do know their [The CAF] main purpose is to protect our country. It can be politically driven as well, depending on the leaders of the country and their purpose, it can change. But from what I understand on a general basis, it’s just mainly protection and leading peace sometimes.” - Female, 18, Student, Ottawa

“I 100% respect what they [militaries] do ... I think they [girlfriends] would think the same way I do. I surround myself with like-minded people, so I assume they have the same opinion as I do.” -Female, 21, Waitress, Ottawa.

Factor 7: Identity. The sense of social identity that the TG has (or anticipates having) within CAF, and specifically in a combat role.

Finding: As in round 1 research, in the majority of instances there was a disconnect between the identity of the Target Group and what they consider to be the identity of a typical combat arms member.

Description of Finding: Broadly, the idea of (violent) conflict was at odds with the TG’s identity. At least two interviewees felt they may be able to do good in the world as part of the broader CAF organisation, rather than the combat arms specifically.

“I wouldn’t want to go overseas. And I would like, I wouldn’t want to kill anyone else, like, I just don’t think I could put myself up to it. I don’t think my friends would either. Like, again, I think [redacted] could maybe get into that type of role. But I don’t

know if you're, like, very, very well, but she seemed like a tough person. I just don't think a lot of, like, females are thinking about that type of role.” - Female, 16, Student, Ottawa

“[The Combat Arms] resonates with me in terms of the whole concept, the main idea, of like you mentioned helping and providing support. So it just resonates for me because for some people that's a choice they decided to do a greater good, if you will, to help others.” Female, 18, Student. Ottawa

[When you spoke to a friend in the military, did it pique your interest?] “Um, a little bit, I guess I just don't know, like, what? How I go about doing it or what I want to do in the military? I've always, it's always every once in a while I think I could join the military but I don't know if it's right for me.” - Female, 20, Photographer, Ottawa

“I don't want to do it [join the military], I am just another total girl, the outfits, the hair, the boots and the nails ...” - Female, 21, Waitress, Ottawa

Factor 8: Recruiting process. The overall effectiveness of the recruiting process – both attracting applicants, and keeping them interested.

Finding: Finding: The nature of Factor 8 coupled with our interviewees having no direct experience of CAF-recruitment processes meant this Factor could not be explored further in Round 2 Qualitative Research.

Factor 9: Current campaigns. The effectiveness and resonance of current recruitment/awareness campaigns that CAF produce.

Finding: The TG are in the main either filtering out advertisement/other campaigns or are not being exposed to them.

Description of Finding: Round 2 research suggests/confirms that current recruitment and awareness campaigns are, in the main, not working. Several suggestions were put forward for what might resonate with the TG, including using certain social media channels, using celebrities in campaigns, painting a more realistic picture of what life in the Canadian Forces is like, availability of current (female) members to talk to about CAF careers and being more vocal/explicit about the goal to have 25% female representation by 2026.

[when asked if there were any ads the interviewee liked] “It's like the Forces.ca ... like a black background and there's an overview shot of the ocean or whatever [...] everyone already knows like, you know, going overseas and that kind of stuff but I think people know less of this work-life balance, or at least I didn't know as much.” - Female, 19, Student, Ottawa

“No I have not [seen ads about CAF recruiting], this is the first time I've heard of it. [recruitment should] catch a lot of people's eyes.” - Female, 16, Student, Ottawa

[Q: And if I told you that the CAF are actively trying to recruit more women into the Combat Arms, what do you think about that?] “That's awesome. I saw when [the US

military] killed the ISIS leader, a lot of people that assisted were women. I thought that was really cool.” - Female, 22, Graphic Designer, Ottawa

“It’s good to hear what the military is like - and talking to someone face-to-face is great. You can ask them questions and, you know, enquire ... there’s obviously people advertising on the internet but, yeah, having someone to talk about it has been really useful.” - Female, 20, Photographer, Ottawa

Factor 10. Self-efficacy beliefs. The extent to which the TG feel they have the ability to meet the challenge of a CAF combat role.

Finding: The perceived psychological challenges of joining the CAF were of greater concern to the TG than the physical challenges.

Description of Finding: Whilst most of the interviewees felt like they could pass the physical fitness tests - either immediately or with one or two months' training - some emphasised the difficulty in dealing with some of the *psychological* and *emotional* demands, feeling that they would struggle more to meet these.

[When asked about the mental and physical challenges of a career in the CAF]. .

“Mentally I think like my conscience, I think about ethics. I think about is this ethically correct. Depending on what it is. I think if you're doing peace support, peace keeping. I don't always think peace-keeping is always super peaceful and I don't always think they should be where they are. So if I was in that situation I would have really [inaudible]. Like I would have to think a lot I think. So I think that would weigh like mentally. I don't think the physical aspects would be as ... I think it would be mentally harder for me then physically.” - Female, 21, Student, Ottawa

“I would need a minimum of a month [to lift the weights shown in the training video] - it looks harder than I thought.” - Female, 16, Student, Ottawa

[Do you think it would be hard to be in the Combat Arms?] “Yeah. If I ever get drafted I would ... die, basically ... internally.” - Female, 24, Financial Advisor, Ottawa

“Not easy but not hard, like ... it's doable [wrt to CAF physical test] If using force needs to be done it needs to be done ... if you're trained properly you could do it - if I was trained properly, I could do it.” - Female, 17, Student, Ottawa

Findings: Parameters (Audience Profile)

Parameter Findings on the Target Group are presented in the form of a generational profile to represent our Target Group (16-25 year old women).



This is Emma.

Emma is either working or studying at this stage of her life. She spends her spare time on social media – particularly on Instagram and Youtube (CE). She is not a big user of Facebook or Twitter, as she finds them to be full of advertisements, parents/politicians, and ‘noise’ (CE/CC/NOISE).

Emma recognizes that social media posts are unreliable and inauthentic, but she enjoys the entertaining content (CC/MA). She does not have social media role models; instead, Emma highly values the opinions of her family and friends (IR).

When she was looking at career options, she relied on her family, her peers, her cultural community, the educational system, and Internet resources (SC/INF).

Although Emma doesn’t know much about the CAF or the combat arms, she considers the organization as rigid and constraining, which is not something that she particularly likes (VAL/BINARY). When she thinks about CAF, the military pay and benefits interests her, especially the possibility of subsidized education (RS), but she does not like the idea of use of force. There are also other things that would prevent her from joining the military such as wearing the uniform and having to travel to remote locations for example (ATT). She also feels that, as a woman, she would have to work harder than the men if she was in the CAF (ATT).

When she thinks about her future, the idea of a military life does not cross her mind; a military life is not compatible with her needs and wants. She values family life and stability all the while having flexibility and autonomy (VAL).

Even though Emma isn't entirely clear on what she wants for a career currently (INT), she and her friends have been considering career options since they were in grade 9/10 (DP). Her friends and family have been a strong influence for career advice (INF/IS), as have school-based sources included career counsellors, career programs, career day visitors and teachers (IR), however the majority of her searching for jobs has been online through YouTube, Reddit, and online job-search programs (CB). Despite not having a strong idea of what she wants to do, she does know that she wants to make a difference, be challenged, and to do what she loves (MOT). She is hoping to do something that contributes to the "greater good" in a predictable workplace where equality prevails (VAL).

Emma really enjoys going to the movies with her friends, which has influenced her view of military life. The latest movie she saw had a great lead female character but she is nothing like her; she was such a "badass" woman, physically strong and mentally tough (BEL). Yes she thinks, the CAF is just not for me.

A more detailed examination of these Findings is included below.

Selected Descriptive Parameters

Whilst all Parameters were investigated and/or analysed during the course of the Live Case Study - and trainees were taught theoretically and practically how to use the full range of BDM Parameters across a variety of scenarios - the following were considered the most prevalent, insightful and campaign-specific.

Channel Credibility

Channel Credibility refers to an audience's perception of a channel's message believability. Most respondents suggested social media to be influential for the Target Group and is used by most, if not all, of the respondents. Traditional media such as television and radio see less usage by the Target Group.

"I've never seen my friend use a TV remote in her life ... Social media [would be a good platform for advertisement. We use] Instagram all the time ... we watch Netflix ... we have cable TV but we don't like it." - Female, 16, Student, Ottawa

There was some dissent over social media's credibility. A few respondents explained that social media is often perceived as inauthentic: used to portray a desired lifestyle, rather than the reality of life. Others describe Facebook and Instagram to be full of "noise" and therefore unattractive or unsuitable for recruitment or promoting job opportunities. LinkedIn appeared to be a reliable platform for job recruitment.

"Different social media is for different ways to perceive your life, or to get other people to perceive your life. Like Instagram. You're going to go on one trip once a year, and you're posting the same pictures all through the year, pretending that you're going back. It's all about how you want to be perceived by other people, because you care about what they think." - Female, 21, Waitress, Ottawa

“Facebook is a lot of noise, Instagram is probably better, and LinkedIn - if the military would like to recruit, it might be a really good idea to post jobs there, post relevant articles also on there, especially towards women ... just reaching out to, like, you know, like “I’ve seen somebody’s profile - so and so went to University of Ottawa, finance degree, they did this and this in their co-op - maybe we want to interview this person and see how, see how it goes” and kind of headhunting them. Sometimes that’s the only way to start it up ...” - Female, 24, Financial Advisor, Ottawa

Channel Credibility is strongly associated with Channel Exposure and Source Credibility, and often relies on these other Parameters. It is important to consider Channel Credibility in conjunction with Channel Exposure and Source Credibility.

Channel Exposure

Channel Exposure refers to an individual’s or group’s direct experience of a channel of communication, specifying how much they are actually exposed to it. Respondents’ channel exposure is varied due to the vast number of online options, but Instagram is the only platform that is consistently raised as commonly used. Adverts in general are disliked - platforms such as Facebook and Youtube, which contain a lot of adverts are considered “noisy” and tend to be avoided (particularly Facebook). There is little to no mention of online news websites, and little use of traditional television and radio, as expected.

There are several mentions of online job search engines. Job applications, including LinkedIn, are used to search for jobs and to receive notifications about job openings or general information on prospective organisations. A program called “Career Cruising” - used in schools to search for jobs that match student’s interests - might be of particular interest.

“Yeah. Probably Instagram. Facebook is a lot of noise, Instagram is probably better, and LinkedIn. To be honest, if the military would like to recruit, it might be a really good idea to post jobs there. Post relevant articles also on there - especially towards women.” - Female, 24, Financial Advisor, Ottawa

“I don’t really pay much attention to ads. [On] Snapchat the ads annoy me. When I watch TV, I just watch Netflix, there are no ads ... I wouldn’t pay attention [to adverts in a movie theatre] ... I do watch [Youtube] videos, but the ads are kind of linked to what you are watching. So my ads are make-up related ... No time [regarding whether her friends watch a lot of Youtube].” - Female, 18, Student, Ottawa

Current Behaviour

The Current Behaviour of a Target Group encompasses that group’s existing practices and actions, including those that a Strategic Communication Campaign is intended and designed to alter. Current Behaviour describes the behaviours of the Target Group in the present, including any non-desired behaviours, and also examines how behaviours change over time.

For the purposes of this report, the Current Behaviour being focussed upon is that of job hunting - the most appropriate behaviour related to CAF recruitment. The TG is currently in a

period of their lives where most of them are currently looking for jobs and exploring career paths (in high school or university, or following part-time jobs). The research shows that they conduct their job research mostly online, by exploring diverse channels, including social media. Conveying information on CAF employment through digital platforms is likely to reach the TG if focused on the channels they use for job finding.

[Q: someone you talk to explore new paths?] “Hum, the internet honestly, it's what has helped me a lot - watching YouTube videos on, like, different experiences and different jobs.” - Female, 20, Photographer, Ottawa

“I was more the person that would influence my friends and start looking into that just because I had the family. Because I do recognise not everyone has that like, you know, mentorship for people to poke at them to look at that early. But, yeah, it was mostly discussions through family that pushed me to look online further. Look for resources.” - Female, 18, Student, Ottawa

“I went to work in a hotel, so I just searched up people's experiences and I saw like how it went down, a typical day in the life.” - Female, 20, Actress, Ottawa

Values and Norms

Values are strong, semi-permanent, abstract and sometimes implicit dispositions held by a group or society. Norms are rules that are the codification of values, and, as such, emerge from Values. Social norms regulate behaviour and act as informal social controls.

Freedom of expression vs. perceived constraint: the TG considers the CAF as a rigid, constraining organisation. Carrying a weapon and/or use of force is generally considered undesirable and against the TG's Values and Norms.

“I don't think [that many women will want to join Combat Arms] because the military is kind of associated with violence, and women don't necessarily want to be associated with violence.” - Female, 21, Waitress, Ottawa

[Question: Why do you think being in the Combat Arms would be so hard?] “Because it would mean for you to shoot. Combat Arms, you have to shoot at something - most likely other people. I don't imagine that should be a concept that rests easy on anybody.” - Female, 24, Financial Advisor, Ottawa

Respondents frequently expressed high value to the idea of contributing to the “greater good” and towards equality in the workplace. Stability and a healthy work-life balance also featured highly in their values - something which they do not equate with a career in the combat arms.

[Speaking of the combat arms] “It's a big sacrifice as well, sometimes. I think what they do in general, like the whole purpose of it is to help and protect. I think I just I have a lot of respect for it, actually.” - Female, 18, Student, Ottawa

[...] “just make it equal - and I know it's harder there are less women, I'm

assuming then men already but it's just making it equal and just showing that women are presently doing it and no one thinks it's a big deal. Because it shouldn't be and it's not I'm guessing and now I know that because I know experiences but not everyone. People are hesitant but if they just see it as normal, they're more likely to react to it as normal, I think." - Female, 24, Actress, Ottawa

[Respondent explains why the Reserve Force would be appealing for her and her friends]
"I think it's good to have, I guess, balance. I know that I would like that a lot. And not that it feels like less of a commitment but you're not away for as long. So that's, that's something that I like as well." - Female, 20, Photographer, Ottawa

"Yeah [I think most women in Canada look for the benefits in Lucy's job], maybe your schedule, to get up a decent time. When she gets home at 3:30 for her kids, like for any mom with kids, this is probably the most ideal thing to be home when her kids are home. I love being busy working and coming home with lots of bills in my wallet, but it doesn't last. Money comes and goes, but the time with your family, she gets off when the kids get home, that's ideal." - Female, 21, Waitress, Ottawa

The TG places a high value on the opinions and values of their family and friends.

"My mom might not like it that much. My brothers might have their concerns but they both wanted to be in the military at some point in their lives so they might say good for you. My niece and nephew will be mad if I have to leave. My friends would probably look at me like I have two heads. My friends know that's not something I would do." - Female, 21, Waitress, Ottawa

[Discussing how she decided to follow a certain career path] "I will talk to my parents, siblings, my partner - like, go back and forth on what I wanted to do." - Female, 23, Student, Ottawa

Selected Prognostic Parameters

Beliefs

Beliefs are the psychological states in which an individual holds a proposition or premise to be true. The Target Group believes that it requires a specific type of personality to join the CAF/combat arms and psychological and emotional resilience, above and beyond what they would want to face as part of their job, is required

“I don't think I'm as intense as [military women] ... I think I'm a little more bubbly.” - Female, 24, Student, Ottawa

“No. I don't think I have the kind of personality that it requires.” - Female, 19, Student, Ottawa

“I don't think it [physical condition of a conflict zone] would have an impact...I feel like it'd be super sad ... I just think like, emotionally it would be sad to see because they had to be taken away from their countries.” [TG believes the conditions of a conflict zone would be emotionally overwhelming for her due to her empathy with dislocated children.] Female, 18, Student, Ottawa

[Do you think it would be hard to be in the combat arms?] “Yeah. If I ever got drafted, I would... die, basically... internally.” - Female, 24, Financial Advisor, Ottawa

The TG believes that men and women are equal, whilst recognising that inequalities permeate our society. Despite stating that there are no jobs that are more appropriate for a particular gender, the TG indirectly relates CAF/combat arms as a male-appropriate career, particularly with regard to physical abilities.

“So, there are still some imbalances and inequalities there, so that can also, like, affect it but that's not to say that a woman could go back to the workforce and push just as hard and get somewhere that a man could.” - Female, 19, Student, Ottawa

“I assume there's a physical test and I know women, and this is going to sound so stupid, I know women can do a lot of the same things men can. But I know that men's bodies are built differently than ours. For example, I might have stronger legs than a guy, but he can lift more than I can. It's just like biological things, but I don't think that stops women. But I think if there's, no matter what career, if there's a requirement let's say to lift a certain amount or do a certain amount. I don't think it's anything to say about her. I just think that that career needs this. Do you know what I mean? [...] Ya, but like my friends, no way because that's not their focus right now. Obviously, they want to stay healthy but the strength to build muscles isn't on their mind. It's not on my mind either, I just want to stay healthy, kind of. I know guys that go to the gym, I know when guys go to the gym, they, like, lift weights because they want to build muscle. We just want to stay toned and, like, healthy kind of thing. But I think that would be the only...otherwise I don't think there's any issues at all like requirement wise it's just the physical stuff that like. Nothing against women at all - it's just that the biological, or physique, like, we can't do the things men can do.” - Female, 21, Student, Ottawa

“[...] on a physical level ... just physical capacity, we're [men and women] not equal, but in everything else? Absolutely.” - Female, 23, Social Media Worker, Ottawa

The TG is unable to reconcile the belief that someone may have a successful work-life balance while in the CAF, most likely due to the perceived element of unpredictability associated with the job.

[When asked what kind of job she thinks "Lucy" does, she eventually guesses "the army." When asked why she said that, she responded with the following] “Just that the sense that you could wake up one day and literally be stationed somewhere else, and it's really unpredictable.” - Female, 22, Graphic Designer, Ottawa

“Absolutely not ... definitely not for me, like I said, as much as I value a career I still want like a normal - quote unquote - home life and I don't feel that joining the military would have supported that. I mean, like, being deployed, active duty that kinda stuff, I feel like as much as obviously ... You can have a family and do that it's not the idea of a family that I want.” - Female, 19, Student, Ottawa

Influenceability

Influenceability refers to the degree to which the TG can be influenced to undertake the desired behaviour.

Amongst many members of the TG, Influenceability surrounding joining the CAF appeared to be low. This seemed in part because career goals tended to be formed during adolescence in the course of identity formation. A typical onset of thinking about career goals was Grade 9, the start of high school in Ontario, though in some cases career goals were formed even earlier.

“Seventh and eighth graders don't think of it, because you're just having fun and learning in school. But high school [comes], you're more thinking of the courses you have to take to make sense for your future career. That's when we started to talk about it. I think I was fourteen when I knew what I wanted to do.” - Female, 20, Photographer, Ottawa

“Um, I think I was around like, fourteen, [when I had my first career ideas]. I've always loved art and I've always loved helping people. So that would be kind of social work.” - Female, 16, Student, Ottawa

“[My friends and I set our career ideas] in Grade nine [I got the idea to be a lawyer] from that TV show with Olivia Pope.” - Female, 18, Student, Ottawa

However, a subset of the TG was less decisive. Those individuals whose early career goals were vague, or became less attractive as they got older and encountered reality, were particularly open to ongoing influence.

“In terms of careers I think I started thinking about that at, like, a very young age. Like I want to say maybe like ten? [...] I started my studies in high school in [a] placement in paediatric palliative care - working with children with life-limiting illnesses, because I wanted to go in paediatrics but then after I took a social science course, I was like,

“There’s problems in the world. How can I translate that into a job? What can I contribute?” - Female, 18, Student, Ottawa

“I still don't know what I want to do. I love photography, but I don't know if that's what I want to do with my career. A lot of my friends didn't know exactly what they wanted to do...they're thinking, “I'll go into the sciences and then figure something out,” or, “I'll go into business.” - Female, 20, Photographer, Ottawa

Informational Reliance

Informational Reliance refers to the tendency to seek and absorb instruction from a relevant group because that group is perceived as a genuinely helpful source of instruction. The Target Group relied on a variety of authorities to obtain career information and information about the CAF: internet sources, school-based sources and parents/family members. Face-to-face or more personal interactions with authority figures/experts had a high degree of Informational Reliance.

“We’d always trust [the career counselor's] decision. My boyfriend told me [about military benefits] ... his grandpa was in the military and maybe told him. Talking to someone face to face is great. You can ask them questions ... there's obviously people advertising on the internet but being able to talk to someone - that's really useful.” - Female, 22, Photographer, Ottawa

“[In] high school we’d have days where ... parents could come. It was a career’s day. That would be a day where a lot of families, especially families that parents were in the military, would come by and explain a little bit more. I knew a couple of people who were in the Reserves ... and then they had recruiters come to our school and do presentations ... that definitely piqued my interest.” - Female, 18, Student, Ottawa

“What has helped me a lot [in discovering career information] is watching YouTube videos on, like, different experiences and different jobs ... I just searched up people's experiences and I saw kind of how it went down, like, a typical ‘day in the life’”. - Female, 20, Actress, Ottawa

Intent

Intent refers to the desire and intention to complete an action or to behave in a particular way. Intent towards joining the CAF/combat arms was extremely low. No respondents registered any clear intention of having seriously pursued - or being especially interested in seriously pursuing - a career in the Canadian military, although some had entertained (then dismissed) the option. Most had fixed ideas about what they wanted from their future careers, if not a specific job. Some respondents indicated Intent towards having a family of their own, which could further reduce (in their eyes) any intentions to join the CAF.

“I don’t see me or my friends going into the military just because those aren’t ... just because I want to go into a lot more creative like marketing and branding and my friends want to go ... one of my friends wants to work for CSIS for like relation wise, like country

relations. One of my friends wants to work at border security, that's in criminology. So, she really wants to work at border security, but I don't necessarily think she would want to be in the position that you need law. I don't know though. I know that she's very curious about it, but I don't think most of my friends – even my friends in science – they want to work at a clinic. One of my friends wants to work in other countries and help with the medical field. I just think we weren't really exposed. Not that we didn't think this was an option for us because if one of my friends wanted to go in the military, I don't see why she couldn't. We weren't exposed to it because in high school you figure out what you want to do and there's nothing in high school, other than maybe a career fair, that would point that, hey maybe military is for you." - Female, 21, Student, Ottawa

"I want to go into either law or diplomacy." - Female, 18, Student, Ottawa

"I'm kind of like all over the place with what I want, you know like more creative or ... on the educational side or, I just don't know what ..." - Female, 20, Actress, Ottawa

"[When I turn 29] Yeah [I want to get] married, have kids ... good work. Life will definitely change." Female, 21, Waitress, Ottawa

"I definitely want a family as well ..." - Female, 19, Ottawa, Student

"I mean like being deployed, active duty that kinda stuff, I feel like as much as obviously ... You can have a family and do that it's not the idea of a family that I want." - Female, 19, Student, Ottawa

Motivations

Motivation refers to the driving force preceding, directing, intensifying and maintaining or terminating behaviour(s). Motivations driving the Target Group in their career aspirations are making a difference, doing what they love, and being challenged. Several respondents emphasised the importance of loving their jobs (sometimes over salary).

"What's the point of working if you don't make a difference in the world? [like Lucy]." - Female, 18, Student, Ottawa

"Yeah, because everything is getting more and more expensive. So, your salary could be important, but for sure I have to like what I'm doing." - Female, 16, Student, Ottawa

"Financially, it'd be really nice to have a nice salary, but I don't think it would fully define it in the end. Like I said, I would have to love what I was doing." - Female, 23, Student, Ottawa

"I guess it's just like, one being able to help people's definitely like my number one thing. But then also, like, the flow of it, I guess. Which is kind of weird to say ... but being able to solve a problem by the very high setting and kind of like challenge myself ..." - Female, 22, Graphic Designer, Ottawa

While motivations vary widely from one person to another, respondents demonstrated a few themes that relate to the CAF: making a difference, loving what they do, and being challenged are all intrinsic motivations that the CAF can provide. By understanding these motivations that the Target Group has, strategic communication campaigns can be better focused to appeal to such strong motivational forces.

Selected Transformative Parameters

Attitudes

Attitudes is an independent measure of affect for or against the attitude object, which is a function both of belief strength, and of evaluative aspects associated with each attribute (Fishbein 1963). They provide an indication of how a group can be changed and determines which buttons have to be pushed within an influence pathway. Attitudes are considered one of the basic drivers of behaviour.

The TG had a negative attitude towards *joining* the CAF and cited a wide variety of reasons from having to wear a uniform and travelling to remote locations, to being away from family and the perceived mental resilience required. The majority of respondents had a favourable attitude towards the CAF as an institution, however.

“I’ve seen a few ads on Facebook. Yeah. But, like my current landlord, who also lives in the house, was in the military for, like, thirty years. And so I talked to her a bit about it. And I thought about it a few times, but I’m just ... I don’t know, I’m not as into the ... it’s like super, super structured and like, you know, you, it’s all very like subordinates and stuff. I think mentally, like physically obviously it’s incredibly hard, but I think mentally would be like a million times harder because a lot of times you know if the people you work with or your family but you’re away for a lot of a long time like you miss people, and especially if you’re overseas, like, it’s a lot harder to just FaceTime or text or go home for the weekend or whatever.” - Female, 24, Laboratory Assistant, Ottawa

“Good people. They’re (military members) thoughtful, thinking of others, also determined, compassionate, and strong.” - Female, 17, Student, Ottawa

Few attitudes around social barriers were found that would prevent the TG from considering the CAF for a career. They did not see a male dominant environment as a barrier as they generally feel the same challenges are present outside the military. The TG feel they would be supported by friends and family, and none mentioned sexual misconduct; even when prompted they were not deterred.

“It’s not that big of a deal. At the end of the day, I’m still going home to my boyfriend, he (the offender) can do whatever, I’m still sleeping the same way at night ... If it was like sexual harassment, then I’m going to HR, but it’s just a guy hitting on me ... then whatever, it comes with the territory.” Female, 21, Waitress, Ottawa

The TG feel that women have to work harder than men and in male-dominated are (or at least could be) treated differently. This theme was consistent throughout most interviews and transferred into how they felt about women in the CAF.

“You’re almost put on a bit of a pedestal because you’re a woman, and like that you’re fragile and they’re going to hurt your feelings and stuff.” - Female, 22, Graphic Designer, Ottawa

“I don’t think there are a lot of females in the military, like it’s more men ... just like if I see parades ... most of them are all guys.” - Female, 16, Student, Ottawa

“I feel like towards gender it is, but I feel like sometimes we might feel like a lesser counterpart to males because genetics, it’s just that they are born stronger. But that doesn’t mean that we can’t be as strong if we just have to work twice as hard. And that’s something that a lot of females have to come to grasp. Sometimes we have to work twice as hard just to get where they are. And that’s, I think that makes us stronger, that makes us better, makes us more ... this is a very commonly [used] word but *powerful* kind of very, like, you know. - Female, 16, Student, Ottawa

Binary Opposition

Binary Opposition is, simply put, a pair of opposites (e.g.: savage vs civilised). Structuralist theory asserts that such Binary Oppositions constitute essential organisers of human experience and thinking, and therefore may determine behaviour. Several respondents exhibited moderate Binary Opposition with regards to gender. Particularly, the respondents mentioned that being a woman (as opposed to a man) who works in a male-dominated workplace would result in greater difficulty. However, respondents gave the impression that working in a male-dominated workplace would be a surmountable challenge.

“Being, like, a male-dominated space, that’s definitely something that I’m sure many Canadian women have to deal with” - Female, 19, Student, Ottawa

Of note, one respondent specified that women are seen to be in need of protection, fragile, and - at the same time - motherly. It is speculated that because gender/societal norms equate women with childbirth, women are expected to give life rather than to take life, and therefore do not belong in a violent organisation. One respondent clearly associated the military with violence and emphasized that women would not like to be associated with violence.

“You get treated kind of differently. They see you as, like, a mother-figure kind of thing. Like, someone they have to protect ... you’re treated differently. You’re almost put on a bit of a pedestal because you’re a woman, and, like, that you’re fragile and they’re going to hurt your feelings and stuff.” - Female, 22, Graphic Designer, Ottawa

“I don’t think [that many women will want to join Combat Arms] because the military is kind of associated with violence, and women don’t necessarily want to be associated with violence.” - Female, 18, Student, Ottawa

During the focus group discussion respondents were asked to create a list of binary categories of their perceptions of civilian careers versus military careers. Table 5 displays the results of this exercise. The respondents agreed that the perceptions of military life are broadly undesirable

and that the perceptions of civilian life are mostly appealing. Any behaviour change communication campaign and any form of recruitment messaging would need to take into account these binary perceptions in order to maximise success.

Civilian	Military
Flexible	Rigid
Move where you want	Told where to move
Promotion/respect based on accomplishments	Promotion/respect based on hierarchy
Develop your own personality	Hard-wired to evolve the way "they" want you to
Freedom of routine	Structured
Ability to change jobs	Long-term commitment
Family Life at home	Career overseas
Unpredictable day-to-day	Predictable day-to-day
Predictable long term	Unpredictable long term
Canadian culture	Distinct military culture

Table 6. Binary categories of perceptions of civilian careers versus military careers.

Decision Paths

Decision Paths refers to the series of decisions that people make and which progressively increase their predisposition to a particular behaviour. Few respondents provided commentary relating to CAF-related Decision Paths, however when expressed, the subjects focused upon relocation, gender and mental health considerations. Overall, the decision path to join the combat arms (and CAF) lacks a clear predisposition.

[When asked about the reasons one of her friends decided to join the military] "I don't know. I think she just really likes the aspect of not being in one place the whole time and like she never really had that much interest in staying home in Ottawa anyway. So I guess [the military] gives her the opportunity to do something rewarding while moving around." - Female, 22, Graphic Designer, Ottawa

"It's tough because sometimes you get posted to different locations and then you have to drag your whole family, and I know most military families end up moving a lot ... now that I think of it, I prefer to just stay (in Ottawa). I like travelling, but not to go live in different places." - Female, 19, Student, Ottawa

"You see things like that could scar you ... like police officers, they can see things that you wouldn't normally see, but everyday life or, like, if you're going to, like, war or something, you'll see dead people which can scar you - in the past wars people came back and they were scarred." - Female, 16, Student, Ottawa

Initiating Sets

Initiating Sets refers to groups of people among the Target Group who act as influencers or catalysts and have the ability to change the minds of the (broader) group, often by being 'early

adopters' and/or by sharing information that is (then) perceived as credible. A couple of the respondents have expressed that they have been influenced by other people in their group who have provided them with information or guidance in searching for a job/a job in the CAF.

“Um, I think we influence each other because when one of us was like, “I’m gonna look for a job,” who is really smart so we all start looking. [Who else?] I know teachers send us a lot of recruitment stuff.” - Female, 21, Student, Ottawa.

“I was more the person that would influence my friends and start looking into that just because I had the family. Because I do recognise not everyone has that like, you know, mentorship for people to poke at them to look at that early. But, yeah, it was mostly discussions through family that pushed me to look online further.” - Female, 18, Student, Ottawa

Message Appeals

Message Appeals refer to the type of message to which a Target Group is most receptive. The most basic types are rational versus emotion, though others (for example, fear, warmth, humour) exist. Many of the respondents referenced the desirability of messages that represent authentic views of life, in particular to the CAF, including seeing the work-life balance aspect and outside interests, and what a day in the life of a female CAF member might look like. The issue of authenticity also came up with respect to a need to directly address some of the more negative perceptions of the CAF, including physical and mental health issues.

“So I guess, like more of like, a realistic view of what being a military entails, because I think everyone already knows like, you know, going overseas and like, that kind of stuff, but I think people know less about this kind of work life balance, or at least I didn't know as much.” - Female, 19, Student, Ottawa

“I think a great marketing campaign would be like to show her life like in a short commercial or whatever it is. Show her dropping her kids off, show her going to the gym, show her in the field, her coming along to pick up the kids, like something like that. Show that in the military, you still have a life outside the military. It doesn't have to be picking up your kids and going, it can be you going to like your art studio after work, it could be you going to the gym, it could be you going to the bar with your friend it doesn't matter. Showing that your lifestyle still upholds and show the work culture within the military. Because I think when people think 'military', people don't think this.” - Female, 21, Student, Ottawa

“[...] someone who is a female and in the force like explaining like, kind of more of, like, the mental health [issues] and kind of what you need to do and kind of give a light approach like don't like say too much or too little but just the right amount. Because you say too much you're struggling you say too little and you're confused stuff like that. Something that kind of that shows the lighter aspects more than like kind of between the lighter and the darker. So it's not like misleading” - Female, 16, Student, Ottawa

Respondents often referenced wanting a career that allows them to contribute to the greater good. One respondent indicated that this was an appealing message that she saw in one of the CAF advertising campaigns.

“If you're committed to, you know, making a difference ... and helping, like, people and going into places ... I dunno, it was just ... it was a different message than what I was expecting ... and I thought it was really well done. Yeah, it was good and I was very impressed. My business side was very happy with that ad.” - Female, 24, Financial Advisor, Ottawa

Reward Structures

Reward Structures are systems through which financial or non-financial incentives motivate people or groups toward a particular course of action or influence their preferences. Several respondents expressed interest in CAF pay and benefits, particularly with the financial benefits associated with increased risks, alongside the fully subsidised education. It is important to note that though the financial benefits were important, the need to feel accomplished was just as (if not more) important to the target group.

“I know that you can get educated - like they can pay for your education but the amount of time that, like, the semesters are I guess they can relate to years and you have to give back by service.” Female, 16, Student, Ottawa

“One of my friends, she wanted to join the army for [the free university tuition] ... ” - Female, 18, Student, Ottawa

“Boys most likely want to do it [risky jobs]. 'Cause they're boys. And some girls might want to do it, because more riskier jobs have a higher chance of paying more ... because you can get injured.” - Female, 16, Student, Ottawa

“In my field of work, you see the impact on people that your work can have, and how it affects their life completely and changes it completely. So, I find that so rewarding. And I don't think I would get that if I was just going and earning a big paycheck.” - Female, 23, Student (and volunteer), Ottawa

Source Credibility

Source Credibility is a term commonly used to imply a communicator's positive characteristics (or otherwise) that affect the receiver's acceptance of a message. Several respondents from the visible minorities group were favourable to receiving messages received from their demographic group when considering future CAF recruiting communication campaigns. People of the same demographic background would have the potential to resonate more positively with the Target Group.

“Normally you see a guy [in advertising campaigns] ... If a girl were to speak, all the girls would pay attention ... they'll be like, “this girl can do it, I can do it.” And then they'll be more ... able to do it.” - Female, 16, Student, Ottawa

“[hearing someone from the job telling what it is?] Yeah, especially that it's like people my age that talk it kind of feels better to hear from that ... ” - Female, 20, Actress, Ottawa

“ ... to see a woman of colour and be like, “Oh, that's intriguing” because again it's a whole concept of dismantling the stereotype of the idea.” - Female, 20, Student, Ottawa

Some respondents mentioned that military members visiting schools would have a positive impact in raising awareness.

“Maybe the classroom [would be a good place to interest her friends in a military recruiting campaign] ... because the military is so broad, you can associate it with numerous subjects. Yes. So, for example, if you go into the economics classroom, you could associate it to economics. If you go into an architecture or engineering class, you could associate it to an engineering seminar.” - Female, 18, Student, Ottawa

“ ... I knew a couple of people who were in the Reserves [e.g. her mother] and then they had recruiters come to our school and do presentations like they do and that definitely peaked my interest and I was just curious ... ” - Female, 18, Student, Ottawa

8. Campaign Intervention Strategy

This section presents the findings of the identified determinants and intervention functions relevant to deriving a campaign intervention strategy to boost recruitment of females into the CAF combat arms. The explanation of determinants and intervention functions is provided in Section 6 above.

Determinants

Motivations

Generally, motivations to join the CAF were low in the TG. There was, however, some willingness to explore the idea of military service. Nearly all respondents had high career aspirations, but the majority felt that the CAF was simply not a viable career choice – i.e. it's 'not for me'.

Reflective motivation: Members of the TG have low personal motivations to join CAF due to family history, career aspiration, education, desired lifestyle, social norms and that CAF is not seen as a prestigious career.

“...my parents...came from Serbian [sic]... as refugees because of the wars. They would be like , ‘What are you doing, in the military? What are you going to be doing?’ ...They’ve seen war first-hand so they don’t want me to get hurt.” - Female, 24, Student, Ottawa

“Because my parents, I guess, they’re from Haiti, so my parents have more of the cultural concept, it will still feed into [the idea that] women should stay home, but...being in Canada for so long, we’ve adapted to a more open discussion on it.” - Female, 18, Student, Ottawa

Several respondents displayed a willingness to explore the idea of military service because of financial benefits and other compensations seen to be better than the norm.

Automatic motivation: The TG has a strong bias against pursuing a career in the CAF combat arms. They see other careers that are equivalent to CAF careers as more desirable (see *Binary Opposition Transformative Parameter* in Section 7). There exists a high fear of risk to personal well-being - physical and/or mental- which was mentioned numerous times during interviews:

“And then also like the mental mentality of like knowing that people next you could like die at any second and you’re basically going into battle and and I think that’s it’s a really hard thing to get over and I think, I think everyone like has a limit.” - Female, 20, Actress, Ottawa

“...you’re essentially trapped in your head for a long time and there’s no way to definitively say how long that period of adjustment and coping...” - Female, 19, Student, Ottawa

Evaluations

The TG have a generally positive attitude towards the CAF, but most have the belief that the military lifestyle is not compatible with a (more desirable) normal lifestyle. They see the commitment of being a soldier as unacceptably long-term, high risk, uncertain, and with issues of gender equality.

The concept of serving in the CAF as a reservist is more desirable to this TG. When presented with the option of performing a job like the CAF as a part time option, TG respondents were more open-minded than to commit to doing so within the regular force.

The TG perceive they are at a physical disadvantage compared to men in the workplace, leading to a perceived barrier to joining the CAF:

“...We might feel like a lesser counterpart to males because [of] genetics, it's just they're born stronger. But that doesn't mean that we can't be as strong if we just have to work twice as hard. And that's something that a lot of females have to come to grasp. Sometimes we have to work twice as hard to just get where they [the men] are.” - Female, 16, Student, Ottawa

“...I think you have to be realistic. You're a five-foot something woman trying to take down a six-foot 200 pound man, what are your chances?... I'm not saying you couldn't, but you can't tell me a man wouldn't do it easier...I'm not saying a woman can't go into those [military and more 'dangerous' occupations] professions, but I think it can't be realistic.” - Female, 24, Social Media Worker, Ottawa

Most respondents have a positive attitude towards the CAF as an institution, but not about joining the CAF on a personal level.

“I one-hundred percent respect what [CAF] does ... I think [my friends] would think the same way.” - Female, 21, Waitress, Ottawa

“Serving our country, but they also help other countries in need.” - Female, 20, Actress, Ottawa

Many respondents said that the male-dominated workspace could be a challenge, but four of them said they welcome the challenge or could overcome the barrier in pursuit of a career they would enjoy.

“No problem [working on an all-male team].” - Female, 18, Student, Ottawa

“[Answering if she sees other Canadian women being interested in Lucy's career.] Well, it's...one thing it did mention as well that peeked my eyes, it did mention it was mostly male dominated for her area. Ummm, I'm thinking of what my friends are all interested in right now. Um personally, yeah. I think my friends, they don't get...yeah I think so. In terms of even like the context of umm even if it's male-dominated or in terms of like getting hands on like yeah I think so.” - Female, 18, Student, Ottawa

Capabilities

The TG tend to have a low self-efficacy beliefs with regard to their fitness suitability for the CAF; however, their actual fitness levels appear to be more than adequate for CAF entry. On the psychological side, many TG respondents thought they may lack the mental strength and resilience necessary to be an effective soldier.

Physical Capability

Many respondents felt that the army physical requirements were simply above them:

“I think in terms of the physical difficulties would just be ... an insane amount of endurance like you know basic training and stuff. I've seen videos and stuff and it's like: “go, go, go.” It's, like, really intense. Normally when I work out it's like an hour at a time. You know, I can take a break when I want to whereas not so much when you're in the military. It's like you have to do this now.” - Female, 19, Student, Ottawa

By contrast, most respondents report having a general fitness level that appears to meet CAF requirements. When the TA was shown a video of the forces test most believed that they could currently pass the test or would be able to pass it with proper training and preparation:

“Yeah [With my current level of fitness, I think I could complete the tasks of a FORCE test]” - Female, 21, Waitress, Ottawa

“Do I feel I could [do the exercises in the CAF training video]? Yeah, yeah... [The physical test video] was not difficult, because currently I'm on strength and development, so with enough practice in lifting, we could definitely do that.” - Female, 18, Student, Ottawa

“It seems kind of easy, honestly, I thought it would be a lot more, like, physically demanding. But I guess the acts themselves make a lot of sense. So like, when you're dragging like the sandbags or whatever, like I guess it makes sense to like, you know, you might have to drag like, I guess, if you're feeling sand, makes like a flood like it's stuff that makes sense for certain context. So in that I understand it, but I thought it would be more physically demanding.” - Female, 19, Student, Ottawa

Psychological Capability

The majority of the TG are averse to weapons and are unwilling to handle a firearm. Some of the TG said they or their peer group do not have the ability to work in the CAF. Most respondents' current mental self-efficacy beliefs seemed low. Most respondents did not think they had high mental strength or resilience:

“So, I think that would be a very big adjustment. Not to say that I don't think ... like if I'd really set my mind to it I feel like I could do it, I just don't know if I would have the mental strength to set my mind to actually accomplish the physical aspect of things because I'm not super invested in that, so I would probably give up.” - Female, 19, Student, Ottawa

“ ... when I think of the army, I think of people who are probably ... a lot more focused and disciplined ... and they follow the rules a lot more strictly.” - Female, 23, Student, Ottawa

Nearly all of the respondents expressed concern about the mental health risks associated with joining the CAF, especially in regard to witnessing difficult situations:

“I don't know how I could, like, see something horrible but then go back to my house and like, have dinner with my family, like and pretend that's all okay ... ” - Female, 23, Social Media Worker, Ottawa

Most respondents did not see working in a male-dominated environment as an issue for themselves but could be for other women who have little interaction with men in their daily lives:

“I could be able to go up to them and be like, “oh my god.” I don't know, like, I don't know ... But I don't think I would have any problem with it at all, I think it may be like an adjustment because right now I work, it's like very mixed, like it's not male dominated at all ... I just think it would be an adjustment because I don't surround myself with a group of guys, you know what I mean ... I don't think I would be intimidated by them. I obviously there for a reason. It would just be an adjustment to find a common ground with them.” - Female, 24, Student, Ottawa

“ ... I grew up with guys my whole life, and I always form, like, a good bond with them. So if I can be ... if we could bond and we can work well together.” - Female, 20, Actress, Ottawa

Social Influence

It was found that the social influence towards or against joining the CAF is negligible. There was some evidence that social networks were not supportive of the risks involved in army life. But there was some evidence too of a positive social influence, especially from family members who had served. There appears to be a general lack of social barriers.

Nevertheless, some negative social influence was expressed, especially from respondents whose parents had emigrated to Canada from areas of political or social unrest:

“ ... my parents ... came from Serbia ... as refugees because of the wars. They would be like, ‘What are you doing in the military? What are you going to be doing?’ [...] They've seen war first-hand, so they don't want me to get hurt.” - Female, 24, Student, Ottawa

“Because my parents, I guess, they're from Haiti, so my parents have more of the cultural concept, it will still feed into [the idea that] women should stay home [i.e. and not be in the military and travelling] but ... being in Canada for so long, we've adapted to a more open discussion on it.” - Female, 18, Student, Ottawa

Infosphere

It was generally felt that the information environment is saturated, especially regarding career options. Many respondents also viewed the information space as being heavily American influenced, and that a lot of social media is negative. Many respondents intimated that they put up filters to a lot of media content, and that the media is responsible for reinforcing biases.

The TG mostly reports never seeing any CAF-related content. It is felt that an abundance of noise and saturation, as well as filters, prevents CAF content from being registered.

“No, I have not [seen ads about CAF recruiting]. This is the first time I've heard of it... [recruitment should] catch a lot of people's eye.” - Female, 16, Student, Ottawa

There was also a widespread sense that CAF recruitment advertisement did not resonate with the target audience:

“Whenever I see pictures of a police force, it's like: men; firefighters: men; army: men - like I haven't seen a woman in any of those advertisements.” - Female, 23, Social Media Worker, Ottawa

Knowledge and Awareness

Many qualitative interviews support the notion that the TG has a low knowledge and little awareness of the CAF and specifically even less about the combat arms. There also is a very low awareness of the Reserve Force. One third of the TG have never noticed CAF recruitment efforts.

[What do you know about the military?] “There's guns. Weird truck things that don't look like trucks ... and ... green.” - Female, 16, Student, Ottawa

[What do you know about combat?] “Umm, not a lot. Call of Duty ... so that's what I picture but not as crazy.” - Female, 24, Financial Advisor, Ottawa

[Are you familiar with the term reservists or part time soldier?] “No, I'm not.” - Female, 20, Photographer, Ottawa

[When asked if she knew anything about the Reserves] “I believe they're called on when needed? I think that's all I know ... ” - Female, 24, Financial Advisor, Ottawa

Environmental Context

Very little information was obtained about the environmental context of the process of joining the CAF. However, one piece of information that did arise was that the application process is perceived to take a long time and that may put some potential applicants off.

Barriers

Overall, there was not much evidence for the existence of many strong barriers to joining the CAF. However, a few recurring themes did arise. By far the biggest barrier, that was expressed widely, was the TG's discomfort with handling a weapon:

“If you have to take a life, that's a big thing. Just because it's part of the job, you have to do it. And when you do it, that changes your outlook on life. It would for sure change a person, unless you've just always been that way-- trigger happy.” - Female, 21, Waitress, Ottawa

“Anybody [in her circle of friends would not find using firearms appealing].” - Female, 18, - Student, Ottawa

The more general relationship between violence and combat roles appeared to be an issue for some respondents:

“I don't think [that many women will want to join combat arms] because the military is kind of associated with violence, and women don't necessarily want to be associated with violence.” - Female, 18, Student, Ottawa

A few respondents expressed an inability to working in the CAF, especially with regards to wearing a uniform:

“I will never be a uniform person. Like at work if you want a t-shirt, I'm so tired I find ways to change it up or make it like my own style.” - Female, 21, Waitress, Ottawa

Determinant	Assessment
Motivation: Reflective	CAF 'not for me' – motivation low. Career ambition is high. CAF not seen as prestigious.
Motivation: Automatic	Fear of risk to personal well-being. Biased against CAF.
Evaluations	Generally positive attitudes and beliefs regarding CAF function. Broadly negative attitude towards being a CAF member themselves. Reservists a more desirable option.
Capabilities: Physical	Physical: low self-efficacy. Actual physical ability: medium to high.
Capabilities: Psychological	Psychological: Perceived lack of mental strength and resilience. Averse to firearms.
Social Influence	Generally low. Support networks not supportive of risk. Some positive social influence.
Infosphere	Saturated. American influence. Negative media. Negative web content. Filters/biases reinforced through media.
Knowledge and Awareness	Low/moderate. Very low for combat arms and Reserve Force.
Environmental Context	Lengthy application process.
Barriers	CAF requirements: weapons, uniform.

Table 7. Summary table of behavioural determinants for intervention strategies.

Intervention Functions

The data from the current Live Case Study enabled a deep understanding of the Target Group through the Actor and Audience Analysis process, leading to a comprehensive understanding of Factors and Parameters, and to a rich target audience/group profile. However, the current project did not provide data extensive enough to draw firm conclusions on viable behavioural interventions. Indeed, it is one of the recommendations of this report, that further research on interventions is undertaken (including quantitative research, which is highly valuable for deriving effective intervention strategies). Nevertheless, the data that supported the determinants findings did allow the generation of some potentially efficacious intervention functions, which are briefly described below:

Social approval

Observe and evaluate one's own behaviours, opinions and performance abilities against others.

Reframing the narrative associated with a CAF career will be an essential step towards achieving any effect on this Target Group. Based on the information respondents were provided and exposed to (mainly in high school) the CAF is perceived by the TG as a boring, unattractive and “last choice” career option. An intervention strategy could aim at reframing the narrative of targeted audiences who have influence on the career choice of the TG (e.g., teachers, guidance counselors and parents).

Modeling

Providing an appropriate model/example for people to aspire to or to imitate for the desired action. Can be done through mass media.

Future campaigns should include examples/models of women in the combat arms trades. Any campaign should adopt an emic perspective/logic (as described earlier); it is a matter of explaining the military lifestyle using the context and cultural narrative of the TG's (simple concept but difficult to apply). Therefore, everything about our examples/models should resonate with our TG.

Environmental Restructuring

Changing the physical context.

This is prompting in the cognitive domain that is passive, but nevertheless influences the TA. In our case study, this could be as simple as removing the 'STOP' sign that is often displayed on recruiting centres' doors, warning visitors to report to the commissionaire before proceeding inside.

Facilitation and Enablement

Creating an environment that makes the action easier or reduces barriers to action.

This is making sure that the structures that are required to complete the desired behaviour are in place, as well as steps to make the behaviour more accessible, or to remove barriers. This is often, although not always, in conjunction with environmental restructuring. For example, posters in a hospital to wash your hands is ER, but F&E is putting in additional hand-washing stations to facilitate the behaviour. F&E could be done through nudging, although that is not the only way to do so. For example, in this case, finding ways to make access to a CAF recruiter or member easier, either virtually or in-person, would be facilitation and enablement: bringing recruiters to schools more often, having a chat function on the recruiting website, or putting people in touch with real CAF members as quickly as possible.

9. Semiotics Findings

About Semiotics

Semiotics is the study of socially and culturally situated signifiers. In a constructed environment we create the world we reside in by consciously and subconsciously shaping the materials that create that world. So everything is communicating something to us on some level. In turn this affects our perceptions and our behaviour.

Semiotics studies both the signifiers that comprise our daily experiences and also our reactions to those signifiers. Both work in tandem to create the cultural landscape. Semiotics is the means of mapping that landscape in order to understand the interactions, perceptions and beliefs we all hold as citizens of a constructed world. Society, and culture, are constantly evolving with every change, innovation, and experience. With so much change taking place in every aspect of life, things that do not change become entrenched and can remain as ideas and perceptions long after they have ceased to be relevant to the evolved cultural landscape. Similarly new ideas can at first seem shocking and abnormal, and yet they gain cultural currency and eventually become adopted and normalised. Semiotics studies the complex interactions of people, places and circumstances to map social and cultural cause and effect. By understanding this fuzzy information we can anticipate where the future may lie, and how we might influence that future.

Applying Semiotics in a Military Context

There are many ways semiotics can make a contribution to situations that are relevant to military organisations. Decoding and understanding social structure and networks, understanding cultural niches with their own beliefs and behaviours, and comprehending the intricacies of rituals, mannerisms, attitudes and behaviours at the social and cultural level can all help with strategic planning in any situation where a military organisation might need to play a role.

Semiotics can make a significant contribution to strategic and tactical planning in terms of revealing greater detail about the field of operation, and in communicating in an empathic way that reflects and shares the semiotic language systems of the audience.

Semiotic analysis can reveal and articulate the often fuzzy and impermanent rules and expectations of a cultural group, society, or geographical location by making a useful connection between something as small as a gesture or a verbal inflection to a larger insight that explains what the significance is, and what it may be revealing about a situation. From the initial premise in semiotics that 'everything communicates something' it becomes possible to understand a great deal about a situation by understanding the ambient or mundane signals within it.

Live Case Study Findings from Semiotics

Due to the change in brief and objectives at the commencement of the course, the semiotics portion of the course reverted to an analysis of the quantitative interviews conducted rather than being based on a semiotic decoding of the cultural landscape.

Working with the first round of interviews and reviews of general cultural themes, the following general insights were deduced from the interviewees:

- Interviewees have not considered an army career at any point.
- They have not seen much/any communications material attracting them to the military.
- They perceive military life as being restrictive, and an imposition on their identity and free will.
- The military is not an attractive proposition - it comes with peril and hard compromise.
- Most interviewees claimed they would prefer a career with the opportunity for greater altruism rather than high financial reward.
- They consider combat arms to be a role for a physically superior, mentally resilient, morally insulated super-humans.
- They don't consider their level of fitness/athleticism to be sufficient for the army. It's not enough, not even for basic training.
- The TG deem that team sports and activities are important for sociability, camaraderie, collaboration, and self esteem.
- There was a surprisingly low energy response to questions about heroes and role models. Few interviewees cited significant role models who represented anything insightful or useful to the study.
- Few interviewees seemed to be particularly guided by an iconic reference point and struggled to name one when asked. This may be a result of the interview context making it difficult to think quickly and clearly enough to answer an unexpected question.
- There is a significant distance between the idea of raising children and having a career in armed combat. The two ideas seem unresolvable in one reality.
- In general, the feeling is that there are now equal opportunities in demanding careers, but women may feel they need to do even more just to prove equal effectiveness and neutralise prejudice.
- The importance of camaraderie was frequently referenced as being an important (even essential) aspect of any challenge or ambition undertaken; particularly female camaraderie in a male dominated context.

The key insight from this set of findings is that there is an unbridged chasm between the lives of the interviewees and the world of combat arms careers. They don't know about the options available to them in CAF, they are largely unaware of CAF recruitment communications, they don't consider the CAF as a desirable career, and in the absence of information they fall back on general assumptions and decide that being a soldier is not for them.

Also contained in the interviews are references and allusions to gender equality, struggle and identity. The Target Group is very engaged with the dominant cultural theme of female equality. They feel there is a need to fight for greater equality, but they also feel that progress has been made and that rather than being in a position of protesting from the outside, they are now in a

position of demonstrating from the inside. The difference being, that they are now the representatives of female empowerment and their actions make the difference in terms of changing perceptions. This is an age group who are, arguably, past the point of placards and demonstrations and at the point of living up to the promise of female empowerment and equal capability. They are here to prove, not to claim.

To that end, there exists at the cultural level a relatively new mindset that is post-equality. It is a confidence that in general terms women must now be recognised as being capable of doing anything that might previously have been considered 'men's work'. It's not a case of complaining about inequality but of proving inequality is out-dated and no longer relevant to contemporary culture and society.

What remains however, is the sense that this still needs to be proven, over and over. Women carry a responsibility for all who follow them, to demonstrate that they are no less capable when faced with out-dated ideas about gender roles. They face prejudice with stoicism and dignity and will act as representatives of the new balance in gender identity politics. This means that many feel they have to do more, give more, sacrifice more and go further just to be sure they are demonstrating mere equality with male counterparts. It becomes a greater burden to achieve the same end result because the end result must be over-engineered to remove all doubt.

The stoicism and determination described correlates with the general cultural theme of progressive female movements and activism, but it feels like it's a step beyond that for the younger, ambitious and motivated females who were interviewed. They align with the political aspects of the movements, but there's almost a sense that the time for movements and activism is almost passed and now is the time to lay the firm foundations of true equality.

This raises an interesting question at the point where we invite interviewees to contemplate armed combat roles in the military. In every sense these people are motivated and determined to demonstrate their equal worth, and in almost any other situation - even dangerous ones - it would be possible to ask if they would take on a demanding, physically dangerous and traumatic role and the answer would be 'yes'. They would step up. They would prove this is as much a woman's job as a man's. Yet, in the area of armed combat, it seems unlikely the interviewees would embrace that challenge or to see it as an opportunity to prove equality.

This is not a question of gender, or gender politics, but of ethics and morality. In that sense, they can foresee that they probably could take on the role, but they don't feel they should do so. In general, it seemed clear that they simply don't see a moral case for the use of lethal weapons.

The Visual Culture of Equal Rights Activism

At a visual and semiotic level, the cultural landscape for young females can be illuminated by many campaigns, activism initiatives and movements. These have a strong semiotic language comprised of bold, vivid non-masculine colours, striking high visibility graphic treatments and strong use of modernist typography. Activism also frequently features a form of searing wit which is deployed to get a difficult message across in an engaging and thought-provoking way.

Now, more than previously, activism needs to be branded rather like a corporation as it needs to be proliferated online in an environment over-stuffed with demands for the audience's

attention. Movements may start locally or nationally but survival will often depend on aligning with a global idea or 'going global' itself. For this reason, cultural change activism is often framed by a very sophisticated and distinct brand image. Extinction Rebellion is a shining example. In a very short space of time it has become globally recognisable due to its adoption of certain graphic styles and recognisable and replicable symbols (or logos). Similarly #MeToo, This Girl Can, Free The Nipple and many others are branded with a level of consistency, organisation and boldness that is equal to many brands. This is necessary in order to distribute one's message in the dominantly digital channels that young people now use. Where there used to be a rigid manifesto, often today there is a rigid brand, and a fluid idea of what that brand stands for which is open to a degree of interpretation at the local level.

The Occupy movement, and, again, Extinction Rebellion exemplify this new approach. Both of these organised protests have a basic ideology, but often there are a number of competing ideas being fought for under the brand umbrella. In the case of the Occupy movement, there wasn't in fact a core manifesto, and it became a conceptual space within which one could agitate for almost anything, as long as it wasn't directly opposed to the base ideology.

The question is, can a military organisation align itself with its target audience by reflecting the semiotic language of this new era of activism and specifically female empowerment movements - and, more to the point, if it can, should it do so?

Leveraging gender politics and equality as a supporting reason for considering combat arms roles feels like it would be a short-sighted strategy that could backfire quite profoundly. The motivation to demonstrate equal capability does not lead to an abandonment of firmly held beliefs and guiding principles purely to show that men and women have equal potential. It is a mistake frequently made by commercial brands who decide that their advertising must 'tap into' contemporary social movements to connect. The mistake is in assuming that merely copying the style of a cultural movement is enough to align with its audience. It isn't.

The Canadian Armed Forces should not necessarily attempt to do that. Ideologically, the military and activism are diametrically opposed even if both are seeking some of the same things (equality for females, a safer and more stable world, and so forth). Activism, by its nature, is about disrupting normality to achieve a new paradigm. Military bodies, when they are representing peacekeeping nations such as Canada, are about containing dissent and agitation, and allowing normality to resume or continue along society's predetermined path.

Furthermore, a military organisation is deeply invested in its own highly complex and multi-layered semiotic language systems. It cannot abandon this and expect to be identified and respected as a military. It would be deemed insincere and exploitative for the military to borrow from this new semiotic language of female equality, leading to a sense of cynical mistrust.

What can be borrowed, however, are the organisational aspects of progressive female movements and the energy of the actions taken to achieve positive progress. It's not the visual semiotics that is useful to understand, but they way they organise, order and promote messages.

There are aspects of the personality of the new female paradigm that can be studied and learned from - not to sell an idea, necessarily, but to demonstrate a compassionate understanding of female culture.

The energy, pace and boldness that resides beneath the graphic language is something that could be adopted. The assertiveness, the short, sharp, pithy sloganisation of large complex problems, the aggressive tenacity and using group strength/endurance to persist - even when you are not being heard, or are being shouted down by those resistant to the message you are carrying forwards - this all has a chemistry to it that would be very useful to study and adopt for female combat arms recruitment. It's the philosophy and the vision that is important, not the style of presentation.

Appealing to young females needs to be founded upon an ideology that has synergy with their own point of view. Often, a seemingly difficult challenge such as the challenge of inspiring young women to engage in warfighting - which is broadly antithetical to their current world view - often contains within it the seeds of its own solution. It is not the weapons that are the focus, but what can be achieved and what needs to be achieved collectively for a better future, and what is at stake if it is not achieved. The weaponry aspect is merely the means to that end, and the question is whether the culturally dominant beliefs and convictions about doing whatever it takes to make the world better are strong enough to achieve it. The question is, can you really stop oppression, defend the weak from the brutal, or to endure hardships in order to secure peace for all without taking on a greater responsibility?

For the younger target age group, the sense of altruism and of fixing the problems - often perceived as created by the preceding generations of adults - is a strong motivating idea and could be utilised as a counterpoint to the unavoidable "weapons = death" conclusion. Weapons might be reframed to mean an end to war and suffering, an end to brutal oppression and an end to threats.

The challenge of identifying candidates

But even then, this is not a message that will connect and inspire the majority of potential candidates. It is one that will connect with a very focussed minority within the national demographic. So orchestrating the right message and presenting it in the right way is only half of the challenge. The other half is reaching the right people and doing so in a manner that will ensure they see and fully understand the message.

This brings us to the challenge of identifying and locating the ideal audience. The course trainees conducted interviews with 16-25 year old females who had declared an active interest or involvement in physical fitness activities.

Over the course of the interviews it became apparent that this was not specific enough as a segmentation to provide candidates worth interviewing for relevant semiotic or cultural insights.

They could tell us why they would not consider a combat arms career, but they were unable to provide any insights that would help identify the ideal candidate. Even when presented with a typical combat arms lifestyle profile in abstract form they could see the appeal until it was revealed as being a combat arms person's lifestyle. At that point, most respondents viewed the job description as undesirable..

Text analysis of the first round interview transcripts

A text analysis technique used by semioticians was applied to the first round of interview transcripts. It is a deductive process that identifies the universally present emotional energies expressed within a body of text that shape perceptions and decision making, either positively or negatively. This system of analysis goes by a number of names, including Universal Energies or Base Motivators.

The transcripts were scanned for Base Motivators and revealed the following strong emotional markers in the answer provided:

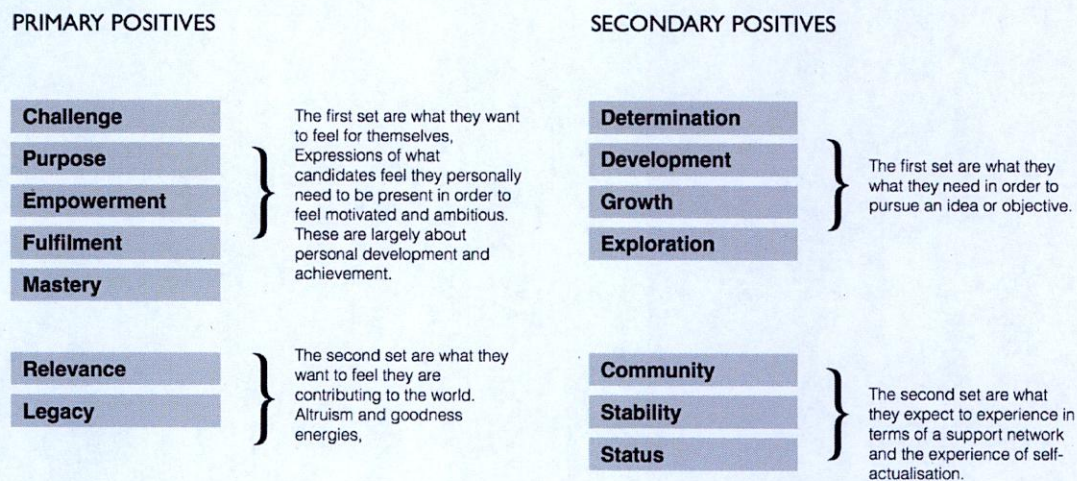


Figure 12: Primary and Secondary positive emotional energies in interviews with 16-15 year old women

Positive Emotional Markers

The positive markers highlight that the interviewees were energised by the sense of rising to a challenge, being empowered by a journey towards mastery and a kind of spiritual or existential fulfilment - not merely earning money running on a treadmill, but making a positive difference to the world around them. Altruism and social purpose was a strong underlying theme within the transcripts. The desire to have some agency and relevance in the world, to be shaping it along their ideological lines and therefore leaving a legacy of a better world than the one they inherited. These are important emotional markers in the transcripts.

To achieve these things the interviewees felt they needed certain traits and qualities: determination, tenacity and an unwavering commitment to growth and self-development. This is largely about internal desires for progression but in the current landscape it is also about being present and contributing to the push for true equality and recognition. To be making progress to ensure the ability to occupy positions previously deemed out of reach.

To achieve their aims, the interviewees often referred to the need for mutual support and rapport from peers in similar situations and circumstances. The idea of pushing ahead and making inner and outer progress in relative isolation is less appealing than the idea of having a

tribe or a pack for support and empathy, guidance and counsel - thus, community becomes important, alongside the idea of a kind of 'sisterhood' which delivers security and stability. This also allows for status amongst peers, which is very different and more rewarding than the longer struggle for status and recognition as a lone female in a male-dominated environment.

These things are all important lower level considerations for the recruitment of combat arms personnel. It feels important for the Canadian Armed Forces to declare that there is a well-established precedent for female combat arms personnel. It needs to be made clear that this isn't a trendy experiment with no support structures in place. The sense that this might be experimental would amplify cautions, issues of safety and of taking an un-formed path they might then regret. One thing that may help recruitment, would be if the CAF formally or informally established either a platoon, or a network, or a specialist training regime that allows female combat arms recruits to come together and find their own identity in a traditionally male-identifying situation.

PRIMARY NEGATIVES

- Threat**
- Conflict**
- Peril**
- Fear**

} The first set are the most present and powerful demotivators. The mortal fear of willingly entering a highly dangerous conflict zone and to be responsible for inflicting mortal injury. This is too powerful a set of base demotivators to simply overlook, ignore, or avoid.

- Disempowerment**
- Depersonalisation**
- Vulnerability**
- Powerlessness**
- Anxiety**

} The second set deal with personal fears of what the experience/process of joining the army will bring. This is not about combat but about the effects of being in the army.

SECONDARY NEGATIVES

- Exhaustion**
- Discomfort**
- Incompetence**
- Trauma**

} This set also deals with the personal fears of what life in the army will entail, but is more focussed on self-doubts about one's ability than the regimental imposition of a demanding army regime.

Figure 13: Primary and Secondary negative emotional energies in interviews with 16-15 year old women

Negative Emotional Markers

The first tier of demotivating ideas:

This tells us that the interviewees are quite strongly demotivated by the sense of mortal peril that is inextricably linked to the role. There is no avoiding that aspect and it cannot be dressed up or camouflaged by sophisticated marketing speak. It is going to be the greatest filter to candidates reviewing recruitment material ... and gender is not an issue here. Both male and female candidates will ask the same fundamental questions of themselves at this point and most will decide they do not have the mettle to continue with an application.

This is the most significant factor for recruitment. It stipulates that the recruitment effort needs to find those relatively few females amongst the population for whom physical endurance, pain,

extreme risk of injury and even mortality are not a barrier to completion of a stated objective - if the objective is fundamentally good for the world. Furthermore, they need to be the kind of people who are willing to put their lives on the line to achieve a better outcome for others. This is not new thinking. There are no breakthrough insights here. This is the challenge that has always existed for combat arms recruitment. The difference here however is that we are actively pursuing greater numbers of female recruits, and that has traditionally not been the optimum target.

Culture has evolved rapidly over the last twenty years from a female perspective. This is the era of breakthroughs and new rules being established. It's an exciting time and one that promises existential and spiritual prosperity for women who will, for the first time in modern history, see the invisible barriers beginning to break down.

Popular culture has shifted accordingly, and is slightly ahead of the curve. We have for some time now enjoyed true female protagonists and heroes across all genres of culture, in movies, TV shows, literature and graphic novels. Female action heroes are tough, they fight, they take damage, they endure and eventually triumph, and they do it on new cultural terms. Those new terms do not frame them as feminine and 'gentle' anymore. They are as capable of brawling, of shooting, of being thrown from moving vehicles and of being shot as any of the action heroes from the male-dominated past.

Exposure to these heroes and the tropes they represent does have a profound effect on the way culture behaves, perceives and evolves. As women become true action heroes and tough protagonists taking punishment in pursuit of an outcome, we see more women taking an interest in a level of physical fitness that was the reserve of men, of competing aggressively in sports to a level that matches and sometimes exceeds mens' sporting achievements. We see taboos around women training for contact combat sports, mixed martial arts, hunting, extreme survival scenarios and so on all crumbling away.

It is no longer an age where we might marvel at a woman doing something extreme and physical. It is an age where it is no longer appropriate to marvel at these things. It is now the emerging and already well-established new normality for society. It is no longer a novelty, it is a fact.

So it is a short leap to imagine an active recruitment campaign for combat arms females that can effectively increase their numbers in ways not previously manageable, that is in synch with this cultural evolution.

The key insight here is that any recruitment initiatives for females in combat arms needs to avoid making it seem unusual, sensational, or groundbreaking. It is a well respected career, with precedent, and well supported.

What has to be overcome is the other dominant trope in culture at the moment. That trope is one where there is an abiding sense that we don't need armies any more, that guns are fundamentally bad and the cause of many problems. We live in a world where the idea of armies is questioned, and where warfare is increasingly understood as remote operations with remotely operated equipment. This is not the reality, but it is a dominant cultural perception. Picking up a

weapon and fighting in the colours of your country no longer feels contemporary. Drones and remote-controlled actions feel contemporary.

This is the problem that must be explored in order to effectively reframe the combat arms role in a cultural context that makes sense of it once more, and which challenges some of the negative perceptions of combat warfare as an anachronistic and unnecessary element of the armed forces.

The case needs to be made clearly that intelligent capable people are needed in combat zones to protect and restore normalcy.

The right candidates are out there to rise to this task. They are possibly interested in mixed martial arts, extreme sports, combat situations, pushing themselves to the limit and not being concerned about personal damage. People who are less sensitive to the risks of risk.

The second tier of demotivating ideas:

Other ideas expressed in the interviews can be categorised as personal reservations about a military career and the disempowering nature of a uniform career. A person who feels whole because of their ideas and the freedom they enjoy to explore those ideas will naturally fear the process of being reduced and confined by conformity to a rank, a function, and a regime that must be obeyed. The sense of a military career depersonalising the candidate is very strong amongst the target age group. It is very out of step with where society and culture resides for young females today. This is a world where you can make it as a personality. You can embrace a role for yourself and fine-tune it to match your needs and expectations more perfectly. This is the era of flexible everything: where you can be a cultural nomad, working from remote locations with a laptop, choosing your hours and dividing your time between your work obligations and the crafting of your ideal online self. It is a cultural phase of the personality and the self. The belief is that through the explorations of the self one can create a difference in the world. It is the loss of that creative flexibility that is troubling to the age group. A number of the interviewees discussed the way they had tried various career options, but then moved on to others if they didn't enjoy them. It's a 'try before you buy' approach to vocation. The army does not reflect that dominant cultural idea.

The army is by its nature about rigour, regime and ritual. It is about being subordinate to a superior. Cultural material commonly depicts the brutal sergeant major barking orders and pushing people to breaking point in order to rebuild them as obedient soldiers. This runs directly across the grain of contemporary culture for the age group. So, again, this is a fundamental issue that needs to be explored further, understood, and addressed with honesty that might reframe reality for the right kind of candidate.

The key to this may lie in development, self-fulfilment and the sense of 'becoming' the best person you can be. If the idea can be reframed to show it a tough process of finding your true worth, it can be efficiently re-aligned with a lot of what is appealing in culture right now: tough love bootcamps, adventuring to remote and dangerous locations, learning how to master dangerous things for recreational purposes. The link can be made, but it must be made carefully and with honesty and authenticity.

Cultural Identity in General

In broad terms, Canada has a distinct cultural identity and it is one that exemplifies equality, progressive thinking and an absence of discrimination, compared to many parts of the western world. Canada has a rich history of racial co-existence and non-conflicted multi-nationality. It has a long history of celebrating powerful and pioneering Canadian women who have struggled and fought to change the world for the better. Compared to many other countries Canada feels largely devoid of some of the street level inconsistencies and disparities that are present in other cultural landscapes.

This potentially makes it easy to address the nation as a whole ,using a base level 'lingua franca' that will communicate to all.

Yet beneath that layer, Canada is a country with numerous cultural 'distances' between different epicentres. It's a vast area with a relatively low density population, and therefore people are spread out and homogeneity has not been as rampant as in other countries. Montreal, Toronto, and Ottawa, for example, are fundamentally different in crucial ways.

There is the urban/rural divide, the north/south divide, the east/west divide, the French/English divide and so forth. Each of these differences means the chosen semiotic language of a campaign must be carefully devised through additional research to understand the unifying element beneath the cultural divides.

Any recommendation at this point would be to instigate and conduct a more ethnographic program of research across Canada, to talk to the true target audience for this recruitment drive, to do so in multiple locations around Canada, and to spend time with target candidate types in their own environment and in a natural manner to fully derive insights which will not be evident in a formal interview suite. An ethnographic approach would be very valuable.

10. Recommendations

From the Base Motivators identified in the interviews, trainees as a group speculated about the possible ideas that could be encapsulated in a campaign to communicate, connect and inspire candidates. These ideas are preliminary sketches to serve as a starting point for strategic development; as ingredients that should be presented or reflected into recruitment materials.

“The New Modern Army”

This describes who the recruiter is.

A rationale for the constant evolution of the military. Making a tangible case for why the army needs tough females on the front line, to neutralise any sense that this is merely a gender equality experiment or a fashionable gesture.

It needs to state the need for tough female combat arms personnel, and extol the benefits of diverse capabilities, mindsets and specific roles that females are uniquely able to fulfil in order to defeat badness and bring peace and liberation to the powerless.

It is not the addition of females that is new and progressive, it is the need to grow that from its relative minority percentage today to a stronger presence in the near future.

The idea of presenting progression and evolution in the armed forces is very important. The public perception of militaries is that they are rigid, traditional and unchanging. Tradition is very important, but militaries evolve constantly to embrace new technologies, new capabilities and new scenarios. Warfare is not the same today as it was just twenty years ago. Military organisations are themselves often unaware of just how much they change, adapt and adopt to the changing cultural landscape

“Make the difference”

This describes who the candidate is.

Combat arms trades are not for everybody. They require a particular mind state and a resilience that is not common amongst men or women.

A campaign needs to find and focus upon those few people who truly have the potential to take on the ominous task of using weaponry to achieve a greater good.

A combat arms campaign for females should be focussed on that 5% of ideal candidates at the exclusion of all others.

It needs to convey the sense that they are the ones who can truly make a difference to the world, and that it's an uncommon trait. It needs to feel like something that somebody can take pride in. Often the idea of being a soldier is mis-perceived by society as being 'the last option'. It needs to be framed more as an option only for the chosen few who have what it takes to do it.

“Find your potential”

This describes the opportunity of a combat arms career.

What the army offers needs to reflect what the ideal candidates seek for themselves.

The offer must play to their desire to be seen as truly equal, and as trailblazers and ground breakers.

It also needs to offer assurances that they will not be alone in this and that they are not participating in an experimental new wave of the army. The army has their back and will support them all the way.

This is an area that needs to reflect the strong desire for an altruistic role and purpose in life. It reflects the desire for making a difference and yet it is in conflict with the idea of creative self-exploration to achieve that aim. So it needs to be framed as the more dynamic, purposeful option that has the greatest effect on the world.

“Why”

This describes the reasons and rationale for a combat arms career.

We need to make the moral case for stepping into peril. This is about righting wrongs, being an active participant in the greater system that seeks moral justice, protecting and defending the weak and vulnerable and securing stability for the world.

It is also about a call to arms in terms of gender inequality and breaking new ground in terms of the ongoing readjustment of gender roles and politics, but in this sense it is about growing what is already successfully established, not experimenting with a new idea.

The foundations of a strategy

The following paragraphs outline a basic set of ideas as a foundational strategic plan for a recruitment campaign. They stand as a starting point for further development with more research undertaken:

About The Canadian Armed Forces

The Canadian Armed Forces work globally to respond to the challenge of threat on behalf of the innocent and vulnerable.

We enter conflict to bring stability, liberation and peace. We use modern military weapons but our most valuable asset is the courage, tenacity and resilience displayed by ordinary people who respond to the challenges that the modern world brings to global civilisation.

Through advanced training and constant evolution we embrace newly-relevant ideas and remain in-step with global change.

We are a progressive, dynamic, ever-changing organisation.

About the need for The Canadian Armed Forces

The Canadian Armed Forces has a long history of embracing diversity as a means of strengthening and adding capability. We don't believe in diversity for diversity's sake, we have an active interest in evolving the military to remain in-step with the threats and challenges of an unstable and changing world.

We have a history of effective recruitment and deployment of female combat arms personnel, and this is something we wish to build upon. Females in combat arms bring a set of skills, perspectives and abilities that are essential, and which cannot be provided by male combat arms personnel.

We are looking for the right kind of candidates to help build our female combat arms division. Females in combat arms roles are currently in relatively short supply and yet most fields of operation around the world require strong, focussed, determined women to help our efforts to repel threats, establish stability and end wars to deliver peace.

About the Candidate

We are looking for a unique kind of female. People who will go to extreme lengths to protect and preserve peace. People who know that a tough situation requires resilience and endurance. People who understand what may be required to defeat oppression and eliminate threat. People who know that it can take extreme effort to bring conflict to an end.

About the opportunity

The Canadian Armed Forces are inviting tough, resilient, determined women to join us in our global role as a peacekeeping force. What we offer is an opportunity to take your place in an organisation that strives to bring positive change to those most in need of it. We will train you to be the best you can be. You will join an elite group of female leaders today and train alongside your peers. The difference you make and the respect you earn will be with you for life.

Recommendations

- Find a sharper focus on the Target Group, specifically for combat arms. These will be a very specific subset within the broad cultural group of 16-25 year old active females.
- Create a visually distinct and separate set of campaign materials for the combat arms objective. Advertising for combat arms recruitment should not be confused with CAF military career recruitment and should not create a sense of risk for candidates applying for non-combat arms roles.
- Make the case clearly that being trained in combat and the use of combat weapons is not the ultimate aim and objective. This is not about creating conflict but ending it.
- Formally or informally establish either a platoon, or a network, or a specialist training regime that allows female combat arms recruits to come together and find their own identity in a traditionally male-identifying situation.
- Leverage the altruism theme prevalent in the Target Group, and make the case that combat arms personnel have a difficult but important role to play in the defence and

protection of others less able to resist oppression or invasion. It is a frontline role defending liberty and democracy. It is the tough job that has to be done by somebody, and it's better if it is done by people who have a sense of compassion, balance, and a desire to see an end to suffering.

- Explicitly highlight that women joining combat arms is not unprecedented nor a bold experiment to align with women's progressive movements today. Women are historically intrinsic to the armed forces, and there remain important reasons for them to be present in combat arms situations. These reasons do not pertain to women being as good as, or better than men. Rather, they pertain to the need for gender balance in combat situations, to ensure female perspectives and rationales are considered. Introducing more women to combat arms will allow these forces to think differently, and potentially more fully, about scenarios and situations.

Work now needs to be done to investigate the cultural landscapes of the focussed Target Audience profiles. Semiotics can add a lot of value at the point where the candidate profile is narrowed down to something quite focussed and specific. Semiotics at that point can help to understand their world, decode it, and identify the cultural themes that are prevalent and important in order to ascertain how (and where) to communicate effectively.

Recommendations for further research

- The live case study focussed on quite a narrow cohort: predominantly well-educated young females living in Ottawa. Future research could consider less homogenous groups - a greater variety of ethnicities, broader geographical locations, differing educational levels and so forth might want to be investigated. Logistical and practical considerations, coupled with the constraints of running a live case study alongside a training course, meant that these areas could not (understandably) be fully explored. It could be that there are large groups of single women living in eastern Canada, aged 35-40 and without a college degree, who would be a perfect fit for the combat arms but are unaware of the opportunities. Could campaigning and recruiting efforts be better directed here? It may seem fanciful but without further research we can't rule such scenarios and groups out.
- Research could also be directed towards currently serving members of the combat arms - both males and females. Females could address some of the concerns raised by members of the Target Group and provoke thoughts about future recruiting campaigns. Something not deeply considered throughout the research was the opinions of *males* serving in the combat arms. Is there a danger that significantly (and rapidly) increasing the number of females in these regiments could lead to a drop in morale and a lack of cohesion, ultimately compromising their effectiveness? Again, it seems unlikely, but radically altering the longstanding composition of these units in a short space of time and the (possible) effects of that is something worthy of consideration.
- The research revealed a definite sense that combat arms/CAF careers increased in attractiveness for women when they felt that the organisation valued and wanted them. The bulk of the CAF recruiting and advertising efforts targeting females involved females addressing other females (either individually or in groups). However, combat arms roles are overwhelmingly populated by males, which begs the question: if females are to be made to feel part of a unit, would they want to be addressed by the 5% of women who

make up that unit - or by the men who make up 95% of it? Future research should investigate whether males serving in the combat arms could be better utilised in future campaigns.

- As noted above, the interviewees largely supported the CAF's drive to recruit more women. Consequently, future campaigns might consider explicitly emphasising the '25% by 2026' goal, and reinforcing the notion that females are regarded as an essential part of a cohesive, diverse, and operationally effective armed forces, rather than simply to fill quotas.
- Further research into the attractiveness of the Reserves and research into potential campaigns based around this. Interest towards joining the CAF increased when the TG became aware of the part-time component of the army. This attractiveness emerged in both the literature and from the qualitative research but these encouraging findings will need confirming and any ideas for future campaigns will need developing and finessing (ie through focus groups).
- Look to other countries with all-volunteer militaries (AVMs) that are addressing similar issues. For example, Harris (2018) highlights the efforts of the Australian Defence Force (ADF) that include, "employing specialist female recruitment teams that concentrate on and mentor female prospects, pre-enlistment strength and conditioning programs for female Army recruits and on-line marketing campaigns [that] connect women with the idea of finding occupations they want to do in the military through *profiles of serving women with emphasis on non-traditional roles*" (our italics). Reportedly there are other countries with AVMs that have achieved 25% female membership including Eritrea and South Africa (Sharpe, 2018) - how have they managed this?
- Some commentators argue that *retention of women* is as important as recruitment of women, and that without addressing these issues, recruiting efforts might increase percentages but will not have a substantial effect on the total number of women in the force (Rodman, 2018). Further research with former or current female CAF members is required.
- Less formal settings, including conducting virtual ethnography, could yield richer and/or markedly different data.
- In conducting further research as outlined above it will be valuable to create a robust and accurate target group/audience profile of the type of person who *would* join the CAF combat arms - currently, the TG profile presented in this study is of someone who is unlikely to join the combat arms.
- To fully understand the relevant target groups and target audiences, and to have a deeper insight into their behaviour, it will be necessary to conduct some large scale *quantitative survey research*. The current report presents a short survey in Appendix F that was compiled as part of the training course. This could be piloted, and, ideally, extended. Moreover, on the basis of further qualitative and quantitative work, sophisticated behavioural surveys could be developed that will greatly enhance the ability to create effective behaviour change campaigns.
- Extending and improving work on campaign intervention strategies will be vital to creating change and meeting recruitment goals. The current study made a start on understanding the determinants and associated intervention functions that will form the foundation of solid behaviour change interventions. Nevertheless, a good deal more

research and analysis needs to be undertaken to extend this existing knowledge and design highly effective, evidence-based, and scientifically robust communication and behavioural campaigns.

11. Conclusion

Recruiting sufficient numbers of female combat arms personnel is an enduring, nuanced, complex challenge for the CAF, and many people have worked on ensuring recruitment methods are the best they can be. The Live Case Study, while relatively novel in its approach in directly targeting the combat arms trades for female recruitment, is limited by the practical and logistical constraints of running alongside a course with researcher-trainees employing techniques that they were previously unfamiliar with.

Although this report will hopefully shed some light on what might work and what works less well, further research into some heretofore unmined (but now identified) areas is necessary.

What is clear, however, is that recruiting female combat arms personnel requires a perception change amongst the public about what the role entails, what it demands, and what it delivers.

To achieve this, a solid understanding of the ideal candidate is necessary, in order to identify the messages that will connect and inspire them, and to encapsulate those messages in a semiotic language that they can identify with, but with a high degree of authenticity.

Yet perhaps perceptual changes will only take the CAF so far. Addressing some of the key reservations highlighted throughout this report at a *systemic level* with regard to females joining the combat arms - issues surrounding deployment, a more harmonious work-life balance, mental health concerns, and so forth - will ensure a more appealing career option for both females *and males* and should foster a more respected, better functioning, more ethically sound and overall more attractive Canadian Armed Forces.

Appendix A: Desk-Based Research Highlights

Canada Factsheet

Population: 35,881,659 (July 2018 est.)

Canada is the second-largest country in the world (after Russia); approximately 90% of the population is concentrated within 160 km (100 mi) of the US border. Canada spans 9,984,670 sq km and comprises 6 time zones.

Provinces and Territories: There are 10 Canadian provinces, with three territories to the north. Provinces: Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, Nova Scotia, Ontario, Prince Edward Island, Quebec, and Saskatchewan. The three territories are Northwest Territories, Nunavut, and Yukon.

Major urban areas: 6.082 million Toronto, 4.172 million Montreal, 2.531 million Vancouver, 1.477 million Calgary, 1.397 million Edmonton, 1.363 million OTTAWA (capital) (2018)

Chief of state: Queen Elizabeth II (since 6 February 1952); represented by Governor General Julie PAYETTE (since 2 October 2017)

Head of government: Prime Minister Justin Pierre James TRUDEAU (Liberal Party) (since 4 November 2015)

Ethnic groups: Canadian 32.3%, English 18.3%, Scottish 13.9%, French 13.6%, Irish 13.4%, German 9.6%, Chinese 5.1%, Italian 4.6%, North American Indian 4.4%, East Indian 4%, other 51.6% (2016 est.) (note: percentages add up to more than 100% because respondents were able to identify more than one ethnic origin)

Languages: English (official) 58.7%, French (official) 22%, Punjabi 1.4%, Italian 1.3%, Spanish 1.3%, German 1.3%, Cantonese 1.2%, Tagalog 1.2%, Arabic 1.1%, other 10.5% (2011 est.)

Religions: Catholic 39% (includes Roman Catholic 38.8%, other Catholic .2%), Protestant 20.3% (includes United Church 6.1%, Anglican 5%, Baptist 1.9%, Lutheran 1.5%, Pentecostal 1.5%, Presbyterian 1.4%, other Protestant 2.9%), Orthodox 1.6%, other Christian 6.3%, Muslim 3.2%, Hindu 1.5%, Sikh 1.4%, Buddhist 1.1%, Jewish 1%, other 0.6%, none 23.9% (2011 est.)

The four **major political parties** in Canada are the Liberal Party of Canada (founded 1861; currently 177 MP's), the Conservative Party of Canada (2003; 97), the New Democratic Party (1961; 40) and Bloc Québécois (1991;10)

National Day: 1 July

National sport: Hockey (winter) and lacrosse (summer)

National animal: Beaver

National dish: Poutine (fries, cheese curds and gravy)

Fun Facts:

- Canada was named through a misunderstanding when Jaques Cartier, a French explorer, came to the new world, he met with local Natives who invited them to their 'kanata' (the word for 'village').
- Canada has more lakes than the rest of the world combined (roughly 31,700- check) and around 20% of the world's fresh water.
- Canada is the most educated country in the world with over half its residents having a college degree (check).
- Montreal is the second-largest French-speaking city in the world (after Paris) and Quebec City the only walled city in North America
- The Canada/US border is the longest international border in the world
- Canada has the third largest oil reserves in the world after Saudi Arabia and Venezuela.
- After the US and the USSR, Canada was the third country to go to space.
- Canada has a strategic maple syrup reserve to ensure supply in case of emergency.
- Justin Trudeau worked as a nightclub bouncer and a snowboard instructor before becoming Prime Minister.
- Famous Canadians include Keanu Reeves, Jim Carrey, Pamela Anderson, Leslie Nielsen and Leonard Cohen.

Canadian Armed Forces Factsheet

“STRONG, SECURE, ENGAGED.” (policy, as of June 2017)

Commander-in-Chief: Queen Elizabeth II (represented by Governor General Julie Payette)

Minister of National Defence: Minister Harjit Sajjan

Chief of the Defence Staff: General Jonathan Vance

Active personnel: 68,000 (2018)

Reserve personnel: 27,000 (2018)

Deployed personnel: 1,700 approx (2018)

(Note, the number of filled positions is lower than the “authorised strength”)

Components of CAF:

CANADIAN ARMY: Comprised of full-time Regular soldiers, part-time Reservists and Canadian Rangers (for remote locations in Canada). Over 30 occupations available in the Army. *Vigilamus pre te* (“We stand on guard for thee”)

ROYAL CANADIAN NAVY (RCN): Over 38 careers available within the Navy. Motto: *Parati vero parati* (“Ready aye ready”)

ROYAL CANADIAN AIR FORCE (RCAF): Over 100 occupations available within the RCAF. Motto: *Sic Itur ad Astra* (“Such is the pathway to the stars”)

(Payment for all of the above start at C\$39,000 p.a. after training.)

The RESERVE FORCE has four sub-components, the Primary Reserve, Supplementary Reserve, Cadet Organisations Administration and Training Service (COATS) and the Canadian Rangers.

Requirements to join the CAF:

NCM (non-commissioned member): 1. 16*-57 years old. 2. Canadian Citizen. 3. Grade 10; Secondary IV (Quebec).

OFFICER: 1. 16*-57 years old 2. Canadian Citizen. 3. Bachelor degree. (source: govt of Canada website/forces.ca)

* for Reserve and Military College applicants. Recruits can join the regular CAF at 17 years old with parental permission.

Joining process (simplified).

1. Submit application (online). 2. Reliability screening. 3. Aptitude test. 4. Medical exam. 5. Interview. 6. Enrollment. (source: govt of Canada website/forces.ca)

Miscellaneous

- Canada has not officially maintained or possessed weapons of mass destruction since 1984 and signed treaties officially repudiating possession of them in 1998.
- During WW2, Canada gave out buttons to people who tried to enlist but were refused due to medical reasons, to show their willingness to fight.
- Since 1947, Canadian military units have participated in more than 200 operations worldwide, and completed 72 international operations.
- Canadian soldiers, sailors, and aviators came to be considered world-class professionals through conspicuous service during these conflicts and the country's integral participation in NATO during the Korean War, First Gulf War, Kosovo War and in United Nations Peacekeeping operations, such as the Suez Crisis, Golan Heights, Cyprus, Croatia, Bosnia, Afghanistan, and Libya.
- In early September 2019, Canadian Armed Forces members headed home after the military concluded its peacekeeping mission in Mali. More than 200 soldiers and eight

helicopters were sent to Gao in the northern part of the African nation in July 2018 to support the ongoing UN mission there. Over the duration of the mission approximately 1,250 CAF members were deployed on Operation Presence-Mali. They performed 11 medical evacuations, over 100 transport missions and had logged thousands of flying hours transporting passengers and cargo. (from CBC report, 01-09-2019)

- Canada's Armed forces operate out of 27 Canadian Forces bases (CFB) across the country, including NDHQ. This number has been gradually reduced since the 1970s with bases either being closed or merged.
- CFB Suffield, Alberta, is the largest Canadian Forces base and the largest military training base in the Commonwealth.
- Both officers and non-commissioned members receive their basic training at the Canadian Forces Leadership and Recruit School in Saint-Jean-sur-Richelieu (Quebec).

Female-specific

From the official govt website:

- Canada is a world leader in terms of the proportion of women in its military, and the areas in which they can serve. Among their allies, the Canadian Armed Forces (CAF) are highly regarded as being at the forefront of military gender integration.
- Women can enroll in any CAF occupation, which includes operational trades, and serve in any environment. In all trades, CAF men and women are selected for training, promotions, postings and all career opportunities in exactly the same way - based on rank, qualifications and merit.
- Women have been involved in Canada's military service and contributed to Canada's rich military history and heritage for more than 100 years. They have been fully integrated in all occupations and roles for over 20 years, with the exception of serving on submarines which was eventually lifted by the Royal Canadian Navy on March 8, 2000

In 2019, it was reported that the Canadian Armed Forces had been fulfilling employment equity targets for internal job postings by secretly rejecting applications from white males, and by not requiring Indigenous candidates to either write, or pass, the Canadian Forces Aptitude Test.

Sources: Forces.gc.ca; Official Canadian Govt website

Timeline of Key Events/Issues DND

1885 - Women first serve (as nurses) in the Canadian military.

1939-1945 - The Second World War sees the creation of three women's divisions in the CAF: the Royal Canadian Air Force Women's Division, the Canadian Women's Army Corps, and the Women's Royal Canadian Naval Service. Some 50,000 women enlist to work as clerks, cooks, mechanics, parachute riggers, and heavy mobile equipment drivers.

1950 - Since 1950 Canada's growth rate resulting from natural increases (births minus deaths) has decreased, while the growth rate resulting from migration (immigration minus emigration) has increased.

1972 - Women make up 2% of personnel in the CAF (inc reservists)*

1978 - The Canadian Human Rights Act comes into effect in the CAF, forbidding discrimination based on gender (among other criteria), unless for a bona fide occupational requirement.

1988 - Women make up 10% of personnel in the CAF (inc reservists)*

1989 - A Canadian Human Rights Tribunal instructs the CAF to "fully integrate" women.

1991 - 120,000 personnel in the CAF*

2001 - 81,600 personnel in the CAF (a 33% decrease from 1991)*

2001 - Canada removes the last barrier to complete inclusion of women in military occupations, when it permits women to serve aboard submarines in accordance with a human rights tribunal decision.

2002 - Women make up 15% of personnel in the CAF (inc reservists)*

2002 - The Canadian government subject the CAF to the Employment Equity Act (EEA), imposing requirements included in the Canadian Forces Employment Equity Regulations (CFEER).

2002 - The Auditor General of Canada reports that the CAF failed to meet its diversity recruitment targets

2006 - Only 6% of all CF members (5% of regular forces and 11% of reservists) are visible minorities compared with 17% of the civilian working population.

2008 - from 2008 onwards there is a 23% reduction in staffing and the closure of 33% of recruiting locations across Canada.

2011 - Ipsos Reid research the Chinese-Canadian population and find that most Chinese-Canadians viewed the military as a respectable career choice, "[only] if they did not have the grades needed to get into a university and did not otherwise have good job prospects."

2012 - Fonséca and Dunn conduct a series of focus groups on attracting and recruiting aboriginal peoples into the CAF. Research indicates that social influencers such as family and community members were the main reason for hesitation in joining the CAF.

2016 - In February 2016, Gen. Jonathan Vance, the chief of defence staff, issues a directive to raise the number of women in uniform by 1 percentage point a year over the following 10 years. If successful, this effort will finally achieve the armed forces long-standing but elusive goal of 25 per cent female members by 2026.

2016 - The CAF release their Diversity Strategy to compliment the CAF Employment Equity Plan 2015-2020. The purpose of the Diversity Strategy is to enable the CAF to attract and retain personnel with a wide range of experience, skills, and viewpoints.

2016 - The Auditor General of Canada reports that the CAF failed to meet its diversity recruitment targets.

2017 - Plans are announced to invest an extra \$62 billion in the military over the next 20 years. These plans include hiring 3,500 more full-time personnel and 1,500 part-time reservists.

2017 - By the end of 2017, there are 12 women at the general and flag officer ranks in the CAF, a record high with four in each service. The number of women in senior non-commissioned member ranks also rises to 57 chief warrant officers and chief petty officers 1st class, as does the number of women in Special Forces roles.

2018 - The overall percentage of women in the CAF increases by 0.3 per cent, “the first positive growth in over a decade,” according to Colonel André Demers, Commander, Canadian Forces Recruiting Group.

2018 - The Women in Force program, giving women an opportunity to learn about military life before they decide to join, officially launches (after being piloted in August/October 2017).

2018 - According to a CBC report [link below] 860 women enrol in the CAF in the fiscal year ending March 31, 2018 - an 8% increase over the previous year.

2018 - Visible minorities make up 7.2% of the regular Forces (compared with 6% in 2016)

2018 - It is announced that the Department of National Defence (DND) are to launch a suite of new digital tools – including a smartphone app that, in its functionality, will resemble the matchmaking app Tinder – aimed at convincing more Canadians to consider a life in the Armed Forces. **

2019 - The Women in Force program put on hold

2025 - Identified goals for representation in the CAF by 2026 are 25.1 percent for women, 3.5 percent for aboriginal peoples, and 11.8 percent for visible minorities

2031 - Visible minority groups will comprise approximately one third of the labour force (according to a Statistics Canada report [2011]) by 2031.

2036 - Statistics Canada predicts that by 2036 the proportion of immigrants from European countries will decrease to between 15.4% and 17.8% while the proportion of immigrants from Asian countries will increase to between 55.7% and 57.9%.

*<https://www150.statcan.gc.ca/n1/pub/75-001-x/2008107/article/10657-eng.htm>

**<https://globalnews.ca/news/4450927/canada-armed-forces-diversity-goals-digital-recruiting/>

***<https://nationalpost.com/news/canada/with-wider-search-for-soldiers-canadas-military-broadens-horizons>

Other sources include:

<https://ml-fd.caf-fac.ca/en/2017/08/5755>

<https://www.canada.ca/en/department-national-defence/services/women-in-the-forces.html>

Gouliquer, M. L. (2011). *Soldiering in the Canadian Forces: How and why Gender Counts!* (Doctoral dissertation, McGill University).

Ng, E. S., & Sears, G. J. (2015). Toward representative bureaucracy: predicting public service attraction among underrepresented groups in Canada. *Review of Public Personnel Administration*, 35(4), 367-385.

Sharpe, R. R. (2018). *Comparative analysis of Canadian and American approaches to military diversity*. US Army Command and General Staff College Fort Leavenworth United States.

Underrepresented female minorities

Since the *Employment Equity Act of Canada* (EEA) requiring the elimination of discriminatory employment practices for women, Aboriginal persons, visible minorities and those with physical and other disabilities, was promulgated in 1995, and the resulting *Employment Equity Plan* was adopted by CAF in 1999, the first three groups have been highlighted in CAF discussions on diversity amongst personnel. Government reports and policies seem to have paid most attention to women compared to minority groups and Aboriginal people.

No mentioning of female minorities in discussions of CAF diversity strategies, with publications addressing diversity through separate discussions of women, aboriginal people, or minority groups. In a publication by the Canadian Defence Academy Press (2005) on gender and diversity issues in the military, separate discussions address women and Aboriginal people.

In 2011, 2012 and 2014 Ipsos Reid surveys were commissioned by the Department of National Defence, examining CAF perceptions of Chinese-Canadians (2011), Asian- and Arab-Canadians (2012), and black Canadians, Filipino-Canadians and Latin American-Canadians (2014). Findings generally showed a lack of interest amongst the studied visibility minority groups in working for the armed forces, with only 1 percent of respondents in each group choosing the military as a preferred career option, and the majority of Chinese-Canadians perceiving the military profession as a career of last resort.

<https://nationalpost.com/news/canada/overall-interest-in-military-careers-low-for-black-latin-american-and-philipino-canadians>

<http://nationalpost.com/news/canada/with-wider-search-for-soldiers-canadas-military-broadens-horizons>

The Canadian Army in the Media

Sexual assault

After two magazines (l'Actualite and Maclean) reported in April 2014 that a large number of sexual assault cases were being ignored or downplayed in the Canadian Armed Forces (CAF), and a subsequent investigation and two large-scale surveys were conducted in the following years, sexual assault within CAF has repeatedly gained media attention. For instance, findings of a 2016 survey suggesting that 27 percent of female troops had been sexually harassed during their career were widely shared by both national and international newspapers. Last year, a large increase in the number of sexual-assault reports was explained in National Post by the head of the military's sexual misconduct response team as a sign of progress in the CAF's efforts to crack down on such offences, while The Toronto Star and other media reported in May 2019 on the minimal progress in military's fight against sexual misconduct, following a 2019 survey of approximately 36,000 military service members. Most recently, the issue again gained (international) media attention as the Canadian government committed to paying C\$900m to CAF members who had become the victim of sexual assault, even though it continues to deny liability (The Guardian, Le Journal de Montréal). On a similar note, historical research reports were shared in 2018 of the Canadian military's raping of German women as the Allies gained control in 1944-45, by National Post.

<https://www.theguardian.com/world/2016/nov/28/canada-military-sexual-assault-survey>

<https://www.theguardian.com/world/2019/jul/19/canada-sexual-misconduct-victims-payout-military>

<https://www.journaldemontreal.com/2019/07/18/ottawa-offre-900-millions--aux-victimes-dinconduites-sexuelles-dans-larmee-canadienne>

<https://nationalpost.com/news/world/allied-soldiers-including-canadians-raped-thousands-of-german-women-after-second-world-war-research>

Right-wing extremism

Similarly, right-wing extremism in the Canadian armed forces has been repeatedly discussed, first by The Toronto Star in a three-part series in autumn 2018 and again after the publication of an internal report by television network Global News in May 2019, on white supremacy, hate groups and racism in CAF. The military's alleged downplaying of such influence in its reaction to the report was criticised in an op-ed in The Globe and Mail.

<https://www.theglobeandmail.com/opinion/article-the-canadian-armed-forces-ignore-extremism-in-their-ranks-at-their/>

<https://globalnews.ca/news/5322011/canadian-armed-forces-members-linked-to-six-hate-groups-internal-report/>

<https://www.thestar.com/news/canada/2018/10/07/rise-of-right-wing-extremists-presents-new-challenge-for-canadian-law-enforcement-agencies.html>

Missions

Canada's one-year mission to Mali has generated frequent media attention, varying from articles discussing emerging disappointment as 'Canada's Mali mission nears halfway mark' to more recently the country's refusal to extend it upon request of the UN. The Globe and Mail discussed how the Canadian military's gender advisors ensure that the female perspective is part of the Mali peace process, yet a National Post op-ed stated that the Mali mission was used symbolically to demonstrate how gender equity has been adopted by the military, arguing that it 'amounts to poor defence planning' to deploy peacekeepers 'where there is no peace to keep'.

Early August, reports of assault and misbehaviour during the Canadian Forces' mission to Latvia (started June 2019, extended till 2023) were highlighted in National Post (national newspaper, conservative), following an investigation that commenced last year. National Post calls the mission in Latvia, where Canada leads the NATO Enhanced Forward Presence Battle Group, 'perhaps its highest-profile current deployment'. Meanwhile, Canada's mission to Ukraine has gained relatively little attention.

Canada's mission to Iraq was frequently discussed in 2016 and 2017, for example following its suspension amidst rising tensions, while from 2018 onwards, apart from some pleas for pulling Canadian troops out of Iraq, the mission generated fewer discussions.

<https://nationalpost.com/news/world/canada-resisting-un-request-to-extend-mali-mission-sources>

<https://www.thespec.com/opinion-story/9270392-editorial-canada-should-extend-its-mali-mission/>

<https://nationalpost.com/opinion/opinion-trudeaus-mali-mission-uses-soldiers-for-symbolism-points>

<https://www.theglobeandmail.com/politics/article-military-advisers-ensure-that-canadian-troops-in-mali-consider-female/>

<https://www.thestar.com/news/canada/2019/05/22/survey-finds-minimal-progress-in-militarys-fight-against-sexual-misconduct.html>

<https://www.ctvnews.ca/politics/disappointment-emerges-as-canada-s-mali-mission-nears-halfway-mark-1.4245374>

<https://www.cbc.ca/radio/thecurrent/the-current-for-october-15-2018-1.4862884/canadian-peacekeepers-can-accomplish-very-little-in-mali-conflict-says-expert-1.4862957>

<https://www.hilltimes.com/2019/05/22/amid-u-s-iran-brinkmanship-canadian-troops-ought-to-leave-iraq/200911>

<https://www.thechronicleherald.ca/opinion/columnists/on-target-canada-should-get-its-troops-out-of-iraq-273574/>

<https://www.thestar.com/opinion/commentary/2016/10/10/admit-it-canadian-troops-in-iraq-arent-just-advising-theyre-fighting-walkom.html>

<https://nationalpost.com/news/canadian-forces-mission-in-latvia-dogged-by-problems-with-harassment-unprofessional-behavior-report-reveals>

<https://nationalpost.com/news/canada/military-police-investigate-after-canadian-soldier-beat-unconscious-during-european-mission>

Recruitment of women and underrepresented female minorities into the army

The underrepresentation of women and minorities in CAF has been discussed in the media at various times in the past years. In June 2017, following a new defence policy released by the government including a commitment to increase the representation of women in the military by one percent annually, the goals and challenges of the policy were discussed by various media outlets (The Conversation, The Star). In the following year, various statements by high-ranking military personnel drew attention to the issue. In January 2018, the issue was raised by special forces commander Maj-Gen. Mike Rouleau, as he expressed the military's ambition to recruit more women into the elite force (CBC, Global News). CAF's failure to adequately integrate women and minorities in the armed forces at large was highlighted in November 2018 in various media outlets, when chief of defence staff Gen. Jonathan Vance raised the issue at a security conference (HuffPost, The Star, The National Observer). In early 2019 an ad for CAF featuring a young woman asking "Can I wear makeup in uniform" prompted criticism, with some arguing that CAF is out of touch when it comes to recruiting women (National Post). The attention came only a few weeks after figures published in January 2019 showed that the number of women in CAF had grown from 15 to 15.7 percent in 3 years time, despite Vance's assertion in February 2016 that he aimed for 25 percent by 2026 (CBC, Global News). In March 2019, a critical op-ed in National Post questioned the military's policy of seeking more gender equality within the armed forces. Recently, the recruitment of minorities in the Canadian armed forces sparked discussions as changes to regulations were made regarding the dress and deportment of uniformed personnel. Hill Times criticised the changes in dress code for accommodating individual tastes in an institution whose core discipline is disciplined conformity, while The Canadian Press viewed the changes more positively, potentially attracting a larger number of female recruits.

April 2019

<https://nationalpost.com/news/bare-legs-ponytails-and-flats-now-allowed-for-women-as-canadian-forces-update-dress-regulations>

https://www.huffingtonpost.ca/2019/04/11/canadian-military-ponytails_a_23710233/

<https://www.hilltimes.com/2019/04/17/beards-and-bare-legs-this-is-no-longer-your-grandfathers-military/196665>

<https://nationalpost.com/news/canada/the-canadian-forces-jobs-where-only-women-need-apply>

March 2019

<https://globalnews.ca/news/5029229/canada-special-forces-soldiers-recruit-street/>

<https://nationalpost.com/opinion/barbara-kay-congratulations-women-on-being-eligible-for-the-draft>

February 2019

<https://nationalpost.com/news/can-i-wear-makeup-in-uniform-top-canadian-soldier-rebukes-military-recruiting-ad-on-social-media>

January 2019

<https://globalnews.ca/news/4857095/canadian-forces-women-recruiting/>

<https://www.cbc.ca/news/politics/defence-women-vance-targets-1.4981603>

November 2018

https://www.huffingtonpost.ca/2018/11/17/canada-needs-more-diverse-recruits-jonathan-vance_a_23592517/

<https://www.thestar.com/halifax/2018/11/17/canadian-militarys-template-for-perfect-recruits-outdated-says-gen-jonathan-vance.html>

<https://www.nationalobserver.com/2018/11/19/news/canadian-militarys-template-perfect-recruits-outdated-vance>

<https://www.hilltimes.com/2018/11/21/open-caf-non-citizens-provide-flexibility-personnel-structure-ways-reach-military-recruitment-diversity-goals-experts-say/177009>

September 2018

<https://globalnews.ca/news/4450927/canada-armed-forces-diversity-goals-digital-recruiting/>

June 2018

<https://ipolitics.ca/article/the-challenge-of-recruiting-more-women-to-the-canadian-armed-forces/>

January 2018

<https://globalnews.ca/news/3923213/canadian-armed-forces-women-military/>

<https://www.cbc.ca/news/politics/special-forces-women-1.4479883>

June 2017

<https://theconversation.com/the-battle-to-get-more-women-into-the-military-79980>

<https://www.thestar.com/news/canada/2017/06/25/canadian-forces-aims-to-fix-its-recruitment-system-to-foster-diversity.html>

January 2016

https://www.vice.com/en_ca/article/jmanv3/the-canadian-military-worried-that-its-female-recruitment-campaign-got-a-little-too-lesbian-y

Appendix B: Expert Interview Summaries

Interviews were conducted with the following Subject-Matter Experts (SMEs):

- SME 1: Marketing and Attractions CFRG
- SME 2: Director, Marketing and Communications
- SME 3: Liaison Officer, CFRG
- SME 4: Staff Officer Attraction and Retention for Canadian Forces Health Services Group HQ
- SME 5: Director, Department of Marketing and Advertising
- SME 6: Master Corporal, Canadian Grenadier Guards (Reserve)

The below is a summary of interesting points/ highlights relevant to the live case study covered during the SME interviews.

SMEs 1+2 [Marketing and Attractions, CFRG; Director, Marketing and Communications]

Q: With these specific groups, are there ones that were particularly targeted - were any efforts directed towards [female] recruitment in combat positions, say?

A (SME1): Not that I'm aware of, there might be. Our model for success is Health Services. Health Services obviously need a certain level of training - so if we have to have an anesthesiologist, if we need two of them then we will go out and look, to headhunt for them. So how they recruit in the health services is the model: we know exactly what we need, we know where we're going to go and look for it and we target it.

A (SME1): [...] We say at the top level that this is what we want but at the tactical level the L4 level...luckily we are at that point in time where, it's such a hot topic, where Military Personnel Command is actually ... their targeting team is actually coming up with a plan and they're going to be targeting the recruitment of women: "Are we talking to the right people? Who do we need to target?" We're working on a recruiting campaign specifically this fall.

A (SME2): What is the focus of that campaign?

A (SME1): That I don't know. It's one of the questions I wrote down for the SMEs, because I don't know what the focus of the campaign is. All they kept saying is "Women" and it's the language that is used at all levels, "We need to recruit more women, more women, more women." but I haven't seen anything that says, "This type of women, or this age group of women"

Q: In light of what were discussing yesterday [recruiting females into Combat Arms], and I know it's a broad question, but what are the barriers to achieving what we are looking to achieve?

A (SME1): Number one is resources. Number two is not having enough focus, so the direction from higher is "We want more women," but they're not telling us...the direction from higher across the board all areas of the military should be, "We need women in the Combat Arms" in order to reach this 25%. But what we're getting is, "We need more women" and it's too broad. So

there has to be a more focussed direction because other people can contribute and help with resources, with ideas ... mostly resources to help make it a success if they were part of the campaign planning, if they knew what was going on, if they ... do you know what I mean? For example, 70% of the people who are in the military have a connection to the military: they even know someone or they're related to someone. Seventy percent. That's a really high number. And yet our internal audience are our biggest critics. So when we launch a campaign, the people who will comment on the fact that the person's slip-on doesn't match the badge or their haircut isn't perfect are veterans or people who are already in the military. So we target that audience and we say, "Hey, we need you to help us, not critique us, be our ambassadors"...then we could potentially amplify our reach. We had a three hour course that every CAF member had to take, the Defence Learns System [?] that made them more aware of the recruiting process, how recruiting works, what our barriers are, how they can help, how they themselves can be more informed then perhaps we can have more people plant more seeds.

A (SME2): But awareness is overarching, right? So you make sure there is awareness within your demographic and then you target from there. If you don't have that overarching awareness then your job is going to be way harder to dig in and find that group who is athletic, who wants to be in Combat Arms, there needs to be a general awareness of the CAF as a career option.

SME 3 [Liaison Officer, CFRG]

Q: From your point of view, with regard to Combat Arms, are there many women applying?

A: I think it's about four percent, which is very low. The problem with that is that the Combat Arms is huge. With our amount of intake ... if your goal is a proportion of a certain number and a huge proportion is ... I don't want to say devoid of women, but really low, even if you're really successful with the recruitment of women in other areas, whether it's intelligence officers, nurses, med techs and so on ... we have identified the 20 (28?) occupations where we get the most female applicants. Even if we are totally winning on all of those, the numbers are so much smaller [proportionally]. We need to have some of those in the big green boxes ... have a little boost up and that would be a great success.

Q: And how do we go about doing that?

A: That's the question, isn't it? That's the really tough nut to crack. I spoke to Indira and some other colleagues and some students yesterday and that's the real question, right, if that was an easy problem to solve we would have solved it by now. So the local recruiting centre sent them tons of different initiatives to try and attract more women - last year we did a big women in engineering event, there have been efforts directed towards women in IT, various different events going on in different communities. A large proportion of applicants actually come because they are influenced by a serving CAF member. Quebec is about 65% in the NEON region I would guess it was higher than that where all the big bases are and where there are lots of military families. It might be lower in some areas, like the Prairies, so across Canada there are 26 different detachments operating from coast to coast and each one is very different. One of the ones I had, Kingston, two years ago, was the highest proportion of women enrolled and it was about 30%. When I was working in Victoria we were doing lots of effort, more than Kingston, to try and get into female targeted events and different things and we were only getting about 9%

so I think if we did nothing we would have got even less than that. The numbers in Sudbury are also low, for example. There is no real difference in training between my team and others - it's a regional thing. In Sudbury we did really well for Indigenous but not so well for women.

Q: Just to go back to the Combat Arms. Is there a subtle perhaps even subconscious way of thinking that, "Because women only make up four percent of the Combat Arms that they're just not interested perhaps, and that we're just not going to target them."

A: No, I don't think so at all. We're doing tons of stuff to try and attract women - there are a lot of efforts by ADMP and DMA and so on when they do their social media and promotions and marketing activities ... we're certainly not ignoring it.

Q: So what sort of barriers would you say you keep coming up against?

A: Well, it's tricky to know where to find them. I mean, where do you find them? Some things have been done to try and find them ... I don't really know the answers. I think you'd have to get kind of radical, get all the crazy ideas on the table and try some different stuff. My personal feeling is that you'd really need to find the women who are willing to challenge the Canadian cultural paradigms. And who are those women? You could ruin the whole spectrum, right? You wouldn't necessarily want to exclude more women by trying to include more [of that type of woman]. How do you target that particular woman who would want to join the Combat Arms? That's a good question. [...] I'm going to leave you with one last thought and this is just my opinion on it. My impression over the years has been that sometimes the professions that have trouble, the in-demand trades, the environment in the trade isn't awesome. We'll make up a job, say you're a widget maker and the widget makers trades have been short for a number of years so the widget maker's moral isn't very high and you're getting posted all the time going from ship to airplane to whatever it is and it's hard, because you're short. So it creates the situation where the applicant who wants to be a widget maker, he or she will try and find a widget maker to talk to about the job and they will find on the army forums or on other places that are not necessarily through the recruiting group, or just by knowing people in the CAF and they will ask them, "So how's your job as a widget maker?" Now, what that person says is going to be viewed by someone from that gen from what a recruiter is going to tell them. So if a person says, "Oh, I'm really unhappy, it really sucks maybe look at some other job" that's probably what the person will do and it doesn't matter ... so, in certain cases and specifically with the women in the CAF I feel like it's a bit of a, "If you build it they will come." Or the things that they care about, balancing a family, care plans, those kinds of things, and keep in mind a lot of women in the CAF are part of a married [services] couple ... if all of those issues are satisfied then women will know that CAF is a good place to work and that's where they will go. So I think it's much harder than finding where to find the people who might join the infantry ... I think the women who are thinking of joining the CAF need to be getting from the women who are serving a sense of this is compatible of what they deem to be important. And if they feel that then I don't think this will be an issue anymore. So there's a chicken and egg phenomenon where there's women in the CAF or particular trade that's struggling, while they're down it will be hard to get people to join them. Do you know what I mean? [...] Until you reach a critical mass so for right now we need to crack the nut of where to find the women who would join the Combat Arms, then once there's enough of them, hopefully the chicken and egg circle will loop round in a different direction.

SME 4 [Staff Officer Attraction and Retention for Canadian Forces Health Services Group HQ]

Q: At the moment we are exploring the idea of recruiting more women into the Combat Arms and it's looking like quite a tough nut to crack.

A: You know I don't have a lot of situational awareness of that, albeit my husband is a Sentry Officer and if you had him on the phone he'd be saying that that's probably a real challenge, for sure. It's easy for us in the health services to recruit women because a lot of the occupations have a high percentage of women anyway - for example there are a lot of nurses working in civilian street - we probably go out of our way to try and find male nurses to join the military. Dental technician is very high [for women], social worker is high for women, even medical officer positions now have a high number of women.

Q: These more 'caring roles' are traditionally associated with women, unlike, say, combat roles.

A: Absolutely, absolutely. One of the things that I have learned being in this job...I attended an awards ceremony for the top 20 women in defence. And that was put on by Esprit de Corps and the moderator/MC for the evening said that it was surprising the number of women throughout Canada who are unaware that they could be employed by the military so I know one of the things that is important from our perspective is getting the word out. I know CFRG along with the Director of Marketing and Advertising are doing a lot of work to attract women and visible minorities and indigenous people. I don't have a magical formula why we're successful at recruiting women - if you're looking at trying to get people [women] into the Combat Arms trades or into the infantry and we're looking at getting them into the health trades, it's going to be a lot easier for us.

SME 5 [Director, Department for Marketing and Advertising]

Q: Would you say that recruiting women into combat roles would be an especially challenging task?

A: A huge task, yes. Very difficult.

Q: And why would you say that? Why would it be difficult?

A: Women in non-conventional roles, with the current job market, it's an issue for many industries, not only ours. It is sometimes ... combat roles lead to danger, it's associated with that, also that women need to deploy, which they are not always ready to do because of family...so it makes it even more challenging. Research we conducted two years ago on how best to recruit women - when women knew more about the different roles within the CAF were ready to hear about it, especially when they knew that there were ways to get training, education ... free education ... but combat roles a challenge.

Q: So awareness could be issue?

A: It could be awareness, yes, it's an issue, but awareness of overall roles too. With combat roles it's more than awareness, there are barriers that need to be overcome. It's a tough job, they

might not see themselves in those roles, now it's a matter of convincing women that there could be good jobs for them ... we have work to be done.

Q: Are you aware of any campaigns that have been directed towards women for these types of combat roles, roles more traditionally associated with males?

A: Past campaigns from other countries?

Q: More from this country...

A: So we did target women; we looked at the recruitment journey and found that they were somewhat aware and from that awareness we drilled down and said, "Okay, if you knew more about the occupations there might be an interest." But not only were they not aware of the occupations because they thought it was mainly combat roles, but we needed to address barriers, we did behavioural insights and behavioural science research and most women thought that they couldn't achieve basic training and yet when we looked at the numbers we realised that women were equally as good as men to achieve basic training [but] they tend to lack confidence despite being just as capable as men at achieving it [passing basic training]. Nine out of ten women will achieve basic training, the same percentage as the men. So we looked at different ways to message them and it worked well.

Q: In your research do you ever get any attitudinal responses, along the lines of "I might not feel welcome in a predominantly male environment like that [Combat Arms]?" That there might be a reluctance to do some of those roles because they are traditionally male roles and they [women] may feel like they're not going to fit in?

A: Good question. The biggest one we've done was in 2017 or 2018 ... I can provide you with the report. [SR asked for report to be emailed]

SME 6 [Master Corporal, Canadian Grenadier Guards (Reserve)]

Q: Would you say that between 2008 and last year [when the interviewee decided to leave] that you had broadly a happy time in the military?

A: I think that in my ten years in the military I had a great time; some of the people who I worked with I would consider my closest friends today and that friendship continues and taskings were...not a lot of fun but we always managed to have a lot of fun in the background. The actual courses are not designed to be fun but with friends by your side it ends up somehow being a great summer (?) or a great contract.

Q: Say you had an eighteen year old niece, would you recommend to her doing something similar - joining [the infantry] as a Reservist?

A: Yeah, actually, there was this one time where my Chief Clerk was going on a Sergeant's course and she spent a month or two away and she had a fifteen-year-old and that fifteen-year-old daughter, I lived with her for that period of time. And she was wrestling with the fact that, "Do I follow in my mom's footsteps or do I go off and do my own thing?" and I remember having this conversation with her quite a few times and I can honestly say that I was trying to...not convince her, but shed light on what a great option it could be, especially as a Reservist, where you can be

focussing on your studies and have a part-time job where you can meet some great people, do some things that you would never otherwise do outside the military.

Q: Would you say that you picked up transferable skills that you could apply to civilian life?

A: Not in terms of [unclear] skills but when it came down to very basic things like leadership and time management and confidence in general - I would say these were things that I had a huge advantage over [other people] when it came to graduating and joining the workforce...I've been told by employers that it's the main attraction when they're looking at a candidate - organisation but it's also motivation and how to deal with different types of people...you learn how to accomplish a task but it's the thoughts and skills behind that I think are more important.

Q: Would you say you were an active, sporty person before joining or did you become one after joining, or were you somewhere in between?

A: I was active - I joined when I was 16 and I guess I was active I was on probably every sports team but I certainly became more active once I joined. That's when I started getting into running and that sort of thing.

Q: Sixteen seems quite young to join - what motivated you to sign up? Did you know people in the forces or did you just fancy it?

A: I lived in a very small town with a very small high school, I think there was like 350 of us in my high school and I knew a couple of people who were in the Reserves and then they had recruiters come to our school and do presentations like they do and that definitely peaked my interest and I was just curious and I went home, I had three brothers, and I went home and I told them that I was thinking about doing this and they all like laughed at me.

Q: Did that make you want to do it more?

A: I honestly think I joined just to spite them in the beginning.

Q: When you say you knew three people in there (the Reservists) were they males or females?

A: So two of them were females and there was one guy from my highschool, so these two females they were also infanters (?) - one of them was a Lance Corporal at the time and one of them was a Corporal, so of course when you join you just have stars in your eyes and you see these women who were CAF and they were cool and it was appealing for sure.

[...]

A: For three or four years I transitioned into the recruiting side of my unit and went round to schools and did a lot of the presentations and there was a lot of interest from girls, for sure when I was thinking of joining. When I was teaching courses the amount of girls on the team, in the platoon, I remember it being shocking, almost half and half.

[...]

A: I didn't struggle with fitting in; I guess there were adaptations to be made...I can remember being one of the smallest ones on one of my first courses and I remember thinking that I had to prove myself a little bit more like I was carrying [unclear] in the back of a rough march on

purpose to see if I could do it - I didn't really deal with...fitting in was never an issue, people very quickly look beyond your gender once they get to know you.

A: I know that when I joined it [female representation] was something like, maybe it was just in my small pool of my brigade or something, but it was something like 6%, it was really low and then when I was really active later on we had really solid representation of women, something like 16%...the goal of getting to 25% females seems realistic because the interest from the female side seems to be growing.

[...]

Q: Do you think you're going to miss the military when you leave?

A: I do miss it but I think I miss the camaraderie a lot more than the actual job, even if I were to go back, that camaraderie is almost no longer because as I said my peers have moved on to other things - either gone Regular Force or moved on to other [civilian] careers.

Q: Is that fairly typical, for people to move on from the Reservists to Regular Force?

A: I think that after a certain point people in the Reservists, a lot of people come to this point where they say, "Do I want to do this as a career?" or "Do I want to keep it as a part-time thing?" And if I want to keep it as a part-time thing can it mesh well with my professional career now that I am older, that seems to be a thing ... a fork in the road that people come to and you either choose to go the Regular Force way if you love it and you want it to become your career or if you've found something else that you want to do ... but as far as your interest in [unclear - war? 12;16] a lot of people end up just leaving the Reserves.

Q: Do you think that perhaps one of the barriers in making that transition for women is work-life balance, maybe having to move away or start a family - would things like that stop them from making that leap, so to speak?

A: Um, yeah, I could see that being a barrier but I know there are work-arounds for that in the Regular Force - I guess that moving around part would be a ... would affect your decision for sure, but in terms of starting a family I think it's similar whether you're in the Reservists or the Regular Force.

Q: Supposing you had a group of 10 teenage girls standing in front of you who were considering joining the CAF, what would you say to them?

A: If they were considering joining? I would emphasise the things that you'll learn going through military training that you will not learn anywhere else, things that are beneficial to you, whether you pursue military or not in your life I think in terms of personal development the military had a huge impact on my personal development and has been beneficial and can be beneficial - especially if you're a girl.

Q: "Especially"?

A: Yeah, it helps you have that grit and toughness that you might not otherwise develop if you weren't to go through those experiences.

Appendix C: Round 1 Qualitative Interview Guide

Interview Guide Females 16-25

Date Interview Guide: 08 October 2019
Date Research: 09 October 2019
Type: Face-to-Face interviews
Duration: 45-55 minutes per interview

Before the interview

Meet the respondent by reception to take her to the interview room.
The respondent will have been asked to read and sign the Interview Consent form upon arrival.

Introduction

Good morning / afternoon / evening. My name is(take the respondent's name)

Nice to meet you! I am a student on a course that teaches research techniques including interviewing. I can tell you more about it after the interview, because doing so first might influence the answers you provide.

Let me start by thanking you for participating in our research. We are here today to conduct a study about your aspirations for the future, and specifically your career, specifically with regard to careers in the public sector.

Your insight is extremely valuable to us. Before we begin, I would like to mention some general points for today's interview.

- As you hopefully already know, we record this session so I can go back and write my report. This recording is for the sole purpose of the research and will not be distributed or published in any way. It's just to make sure I capture all of your valuable thoughts. Your answers will be anonymous and won't be linked to any of your contact details or your name, and you won't be identifiable from the report.
- There are also a few of my colleagues watching my interview to see how I am doing!
- You will have received the interview consent form when you arrived; do you have any questions about this? May I have your signed copy?
- The interview will take approximately 45 to 55 minutes.
- Everything you say is important to us and we want to hear what you, personally, think about various things. That said, you don't have to answer any questions you don't wish to answer, and you are free to terminate the interview at any time.
- Do you have any questions before we start?

Demographics

- I'd like to start by asking you a few general questions about your background.
- Where were you born?
- Where did you grow up?
- Which town or city do you currently live in?
- Could you tell me a little bit about yourself? What do you do with your time?
 - Probe into work / study / being at home; what they like / dislike about how they spend their time.
 - That's interesting; what made you decide to get into this (job/study)? [If **unemployed**, "Is that an issue among you and your friends? How does that make you feel?"]

Warm up

- What kinds of sports, fitness or organised activities are you involved in on a regular basis? [They were recruited because they do sports. If they say 'none', then ask them what they do for leisure, entertainment, or for recreation.]
- Pick your favourite activity from those you mentioned: What is it that you enjoy most about being involved in that sport/activity?
- If you had to quit this sporting activity, what would you most miss about it?
- Think about comparing your ability on your chosen sport/activity against that of your team mates. Would you say that you are better or worse than them (or about the same)?
- Do you set specific personal goals for improving in your sport/activity? For example, trying to beat a time, or getting fitter, stronger etc. Would you say you are good at achieving those goals?
 - Why / why not?

Role Models

- Outside of your family and friends, is there anyone who you really look up to - perhaps a celebrity or someone in the public eye?
 - What is it about this person (or people) that you find inspiring and/or admire?
 - Do you ever feel like you would like to be a bit more like them?
 - If yes: in what way? / If no: why not?
 - Have they influenced any of your life choices? For example, have you found yourself doing something in life or liking something because they do?
 - If yes, how?
- Have you ever heard or seen a cool/compelling/engaging story about a woman in history and felt inspired? This could be something from a book or a tv show or a film...
 - Can you tell me about this and why it inspired you?

Values and Identity

- In your view what are the positive qualities shown by a good person?
- Can you describe the qualities of someone who has strength of character?
 - Does this differ for men and women?
- Also, what about organisations...What are the positive qualities shown by good organisations; for example perhaps, an organisation that you'd like to work for?

Career Prospects

I'd like to move on now and talk a little bit about what you are looking for in your career / employment.

- First of all, would you say a career is something you have given much thought to? (If yes, why; if no, why not)
- Are careers and what you are going to do with your life something you speak with your friends about, or does that topic not really come up?
- Could you please share with me what kinds of jobs and/or careers have you been looking at and considering? [If they say they are already in a career, ask them: 'How did you get into that line of work?']
- Why have you been considering those/those specific career(s) – what actually do they give you?
- What would you consider to be a successful working life for you?
- If you could choose between either making decent money in your job but contributing little to society, or making less money but contributing more to society, which would most suit you, and why?
 - With regard to that last question, what about your friends and peers? What do you think the majority of them might say?
- Do you perceive men and women to be equal in Canadian society?
 - What makes you think that?
- Do you think there are any jobs that are more suitable for men than women, or the other way around?
 - Can you give examples? (Probe into more examples...)
 - Can you give any examples of jobs that are heavily male dominated?
 - What about the military, specifically the army? Do you think this is equally suitable for men and women? Why/why not?

(moving into Section 2)

- Do you know anything about these kinds of jobs?
 - If yes: How do you know about – or have become aware of – these types of jobs?
 - Where have you seen information about them? (Prompt: For example: ads, TV, recruitment fairs, school, careers advice etc.)
 - **If they mention ads, social media campaigns ask:** What do you think about those ads/campaigns? Do they speak to you?

- Now, thinking about those career options, and the ways you have come to know about them, could you tell me to what extent they are attractive options to you?
 - What is/is not attractive and desirable about such careers?
- Considering the types of jobs we have just talked about – have you known any friends, family, or friends-of-family who have worked in those kinds of jobs? And have you ever talked to them about their work?
 - If yes: Have you ever considered, or are considering, following in their footsteps?
 - If no: Have you ever considered, or are considering, working in jobs such as those discussed? Any in particular?
- Have you ever considered any of the more dangerous/adventurous types of jobs, such as fire service, border service, army etc.? Why/why not?
- Do you know if any of your friends or peer group have thought about these kinds of jobs? Is that something they would speak about?

Ability and Identity

- If you were to have a job in the public service domain, such as the fire service, or the army, how would your friends or family react to this?
- What do you think the mental and physical challenges of a job like that would be? Do you think you could meet those challenges?
- Could you see yourself working in a challenging environment like this? Could you see yourself fitting in? Why/why not?

CAF Combat Role specifically

I'd like to end by asking a few questions specifically about the armed forces.

- Have you ever considered a job or career in the Canadian army? [If 'no', then ask about any of the military branches]
- Does a career in the army appeal to you in any way? Do you think it appeals to any of your friends? Why/why not?
- Do you know what is meant by a combat role in the army?
 - If not, explain. Then: Have you, or would you ever consider being in a combat role in the army? Please explain why/why not.

Closing

- That's all I really wanted to ask - thank you very much for your time... Is there anything you would like to add?

As you may have guessed from some of the questions, I work for the Canadian Armed Forces myself, and as part of our course we are conducting a case study into people's interest in a career in the Combat Arms.

- Do you have any questions before we finish the interview?

Thank you very much for participating in this research!

[At the end of the interview, take the respondent back to the reception, thank them again and hand them over to the host(ess) who will provide them with their incentive.]

Appendix D: Substantiating Evidence for Round 2 Research Objectives

See: Waruszynski et al. (2019) Perceptions of Women in the Primary Reserve on the Recruitment and Employment of Women in the Canadian Armed Forces

When responding to the question about why women joined the Primary Reserve over the Regular Force, an overwhelming majority spoke about the importance of maintaining control in their lives or having the flexibility to make decisions regarding one's employment (e.g., part-time employment or summer employment) and family life. As one participant stated, when you join the Primary Reserve, you are able to "own your own soul." Many participants highlighted the importance of having a sense of control over where they live as opposed to being directed where to live through different military postings. One participant highlighted that people "can still make a contribution in the military on a part-time basis...while still doing a career that [they] enjoy and love." Another participant stated, "You can do whatever you want and be in the Reserves." Interestingly, a significant portion of the participants chose the Primary Reserve as a way to progress into military life, with some participants intending to join the Regular Force if they wanted to enroll in a full-time military career - (Waruszynski et al 2019 b), p.3

What seemed to be highly appreciated by some of the participants was the fact that the Primary Reserve offered an ideal work schedule for students. Participants who were still students at the moment of the focus groups believed that joining the Primary Reserve was one of the best decisions for someone who is pursuing an education. A number of participants started with the Primary Reserve as a way to earn money in the summer and during high school or to save money to pay for school when they were in university. It was viewed as a better opportunity to earn money than some of the other available options. (Waruszynski et al 2019 b), p.3

Having a parent or family member who served in the CAF was also a prevalent motivator to join the Primary Reserve. Some of these participants highlighted that support from family and friends actually influenced their decision to join the military. However, negative reactions from family members, parents, guardians, or friends also played a key role in deciding whether to join the military. Interestingly, some of these negative reactions were associated with a lack of knowledge about a military career or way of life, or the negative media attributed to sexual misconduct in the military. For example, the safety of reservists was the most highlighted concern for family and friends. The choice of military trades or occupations was also found to influence parents' and family members' reactions. The findings suggest that participants' choices to enroll in combat arms (i.e., infantry, artillery, and armoured) seemed to negatively escalate reactions from parents. In a few cases, parents refused to talk to their daughters immediately following the announcement of their decision to enrol in the Canadian military. (Waruszynski et al 2019 b), p.3

[...]some of the participants found the recruitment process extraordinarily long, and described negative experiences with the recruiting staff. These experiences were quite similar to those described in the Waruszynski et al. (2018) study, which noted perceptions of the recruiting staff

as being disinterested and uninformed. A main concern expressed by Primary Reserve participants was the lack of female representation among recruiting officers and the inability of recruiters to speak to women’s concerns. Many felt that the recruitment materials needed to be more accurate about what the military is like, in general, but also what it is like specifically for women. (Waruszynski et al 2019 b), p.4

Military climate and masculinized culture

A number of women described the military culture as being male-dominated and highlighted some of the challenges for women in the military. As one participant succinctly stated, “Throughout my career, I have always been reminded that I’m a woman.” Another participant described an interaction with a colleague where her abilities as a woman in the military were completely undermined: “I had one person give me the C9 on course to say, ‘Here, just take that and just look pretty’.” Several women stated that they had experienced offhand comments and disrespectful language. In addition, some women were subjected to sexist behaviour. As an example, one participant stated: “I had a supervisor in my last job that I worked 5 Class B, and the reason that I stopped working full-time for the Canadian Forces, who told me in front of all of my subordinates, of which I had six, that I should never have been able to pass PLQ because I was female.” A number of participants described being tired of continually discussing issues attributed to one’s gender. For them, being a man or a woman was not relevant to being a soldier/sailor/aviator. Everyone was a member of the CAF, and contributed to one Defence Team. However, there were those who recounted situations where their gender was pointed out by others, such as the officer who would continually apologize for swearing because he was “in the presence of a lady.” (Waruszynski et al 2019 b), pp.4-5

Formative Research for Recruitment Marketing and Advertising 2019 Final Report - Earnslcliffe Strategy Group (online survey; n=2,031) [in POR resources]

Under half (40%) are familiar with the CAF, but their opinion of the CAF is mostly favourable (68%). Overall, respondents who are visible minorities, Indigenous, male or from Atlantic Canada are more familiar with the CAF. p.1

One in five are either very likely (4%) or somewhat likely (16%) to consider a career in the CAF. Interest in joining the Reserves is higher (45%). p.2 (nb this figure is for both males and females)

2019 Comparative Analysis of Regular and Reserve Force Prospective Recruits [in POR resources]

The recruitment and retention of skilled Reserve Force personnel is paramount in Canada’s new defence policy Strong, Secure, Engaged (SSE; DND, 2017c) and also in the Reserve Strategy 2015: Strengthening the Primary Reserve (Chief of the Defence Staff, 2015), as the goal is to enable a Reserve Force that can generate full-time capability through part-time service. To this end, a number of new initiatives will be put in place in order to enhance the role and capabilities of the Reserve Force. CAF efforts will be concentrated on increasing the size of the Primary Reserve to attain a target of 30,000 (DND, 2017c). This may be a significant challenge, as Canadians have generally low awareness and familiarity with the CAF (Earnslcliffe Strategy Group, 2018). Furthermore, in an online panel survey, when young Canadians were

asked about their interest in pursuing a job in different institutions/industries, the CAF came in ninth position (out of 14). Young Canadian respondents were most interested in working in small and medium enterprises, followed by the health care system, non-profit organizations, big corporations, and the educational system (Otis, 2018a). Research indicates that there are many factors that determine whether someone will enlist in the military, especially in regard to the Reserve Force. Some of these factors include compensation, military pay relative to civilian pay, unemployment rate, the number of recruiters (e.g., staffing), recruiter management policies (e.g., recruitment quotas), advertising, enlistment bonuses, and educational benefits (Asch & Warner, 2018). In order to successfully actualize the objective to increase the target strength of the Primary Reserve, it is imperative that CAF advertising and recruiting initiatives targeting Reserve Force prospective recruits be re-examined and that strategies be developed to overcome recruiting challenges. P.1

The diversity challenge in recruiting is not unique to the CAF but corresponds to a general concern of many Armed Forces (AF) who are also exploring ways to recruit more women and visible minorities. Recognizing the challenges of expanding the AF recruitment pool to demographic groups currently under-represented (in particular women and visible minorities), a working group under the framework of the European Defence Agency was formed. The Experts Survey aimed at subject matter experts in human resources policy, personnel management, and military recruitment. The survey was administered in the six participating countries of the working group (Canada, Belgium, the Netherlands, Norway, Sweden, and Switzerland) to gather their opinion and recommendations on needed personnel programs, policies, and initiatives on the possible ways to address the demographic challenge. In the opinion of experts, increasing the diversity in recruitment could be best accomplished by having more women and visible minorities as role models, promoting equal opportunity and inclusiveness, eliminating discrimination and harassment, and having better integration of work and family life (Otis, 2018b). The Ministry of Defence in other countries including New Zealand, Australia, the United States, and the United Kingdom (UK), are also making significant changes to recruitment strategies in order to increase diversity in their AF (Australian Department of Defence, 2016; Defence Advisory Committee on Women in the Services, 2017; New Zealand Ministry of Defence, 2016; Weaver, 2018), such as changing advertising campaigns to increase the attractiveness of a military career for women. p.3

Challenges faced in recruiting soldiers for the new Army Reserve include a major breakdown of the recruitment process due to problems with the implementation of a new information and technology system, which resulted in major delays in processing applicants, and many applicants abandoning the process; diminished motivation to join the Reserves, due to the ending of the war in Iraq and Afghanistan; constraints in marketing; budget cuts; and conflicting messages to the general public regarding military recruitment, due to the simultaneous reduction of Regular Force soldiers (Edmunds et al., 2016). Recruitment strategies employed by the UK include new advertising and publicity campaigns for their Reserve Forces and providing financial incentives for applicants and new recruits. These include covering the travel expenses associated with the recruitment process, lump sum payments upon the completion of key phases of training, and bounties provided for ex-regulars who sign up for the Reserves (Edmunds et al., 2016; UK Ministry of Defence, 2018). p.4

In addition, Reserve Force prospective recruits were more likely to indicate not having seen CAF advertising recently than Regular Force prospective recruits. pp.16-17 (nb this is for both males and females)

The Forces.ca web site still remains the most influential official CAF advertising source, although slightly more influential for those interested in the Regular Force than those interested in the Reserve Force. The most influential unofficial advertising sources are the general media and knowledge of other militaries, consistent with findings by Otis and Al-Tawil (2013). With regards to influential people, friends or relatives with CAF experience and recruiters are the most influential individuals for both groups of prospective recruits. Overall, the most influential (official and unofficial) information sources and individuals for both groups of prospective recruits were the CAF recruitment website, family or relatives with current or previous CAF experience, and recruiters. Consistent with previous findings, the CAF recruitment website was the most influential source for Regular Force prospective recruits. However, recruiters are now the most influential source for Reserve Force prospective recruits, as opposed to the CAF recruitment website as in past findings. p.50 (nb this is for both males and females)

Appendix E: Round 2 Qualitative Interview Guide

Interview Guide Females 16-25

Date Interview Guide: 25 October 2019
Date Research: 28 October 2019
Type: Face-to-Face interviews
Duration: 45-55 minutes per interview

Before the interview

Meet the respondent by reception to take her to the interview room.

The respondent will have been asked to read and sign the Interview Consent form AND read the 'Lucy Scenario' upon arrival.

Introduction

Good morning / afternoon / evening. My name is(take the respondent's name)

Nice to meet you!

I am a student on a course that teaches research techniques including interviewing. I can tell you more about it after the interview, because doing so first might influence the answers you provide.

Let me start by thanking you for participating in our research. We are here today to conduct a study about women in non-traditional careers.

Your insight is extremely valuable to us. Before we begin, I would like to mention some general points for today's interview.

- As you hopefully already know, we record this session so I can go back and write my report. This recording is for the sole purpose of the research and will not be distributed or published in any way. It's just to make sure I capture all of your valuable thoughts. Your answers will be anonymous and won't be linked to any of your contact details or your name, and you won't be identifiable from the report.
- There are also a few of my colleagues watching my interview to see how I am doing!
- You will have received the interview consent form when you arrived; do you have any questions about this? May I have your signed copy?
- The interview will take approximately 45 to 55 minutes.
- Everything you say is important to us and we want to hear what you, personally, think about various things. That said, you don't have to answer any questions you don't wish to answer, and you are free to terminate the interview at any time.
- Do you have any questions before we start?

Demographics

I'd like to start by asking you a few general questions about your background.

- Where were you born?
- Where did you grow up?
- Which town or city do you currently live in?

Warm up

- Could you tell me a little bit about yourself? What do you do with your time?
 - Probe into work/study/being at home; what they like/dislike about how they spend their time.
- Thinking about your group of friends – the people you hang out with, the girls you spend time with, (this could be friends, family, co-workers etc.);
 - Is there a movie / show that you and your friends all like equally?
 - What is it about the movie that you all liked?
 - Do you and your friends have many things in common?
 - Can you give other examples of things you all like, or that you all like doing?

That's really interesting. As you know this interview is really to learn more about females in the Canadian work force and specifically in non-traditional roles.

- When did you and your friends first start talking about a career or what you wanted to do?
 - Including family and friends, who have you spoken with, or who are you planning on speaking with, about career information or career decisions?
 - Where do you and your friends search for career information?
 - Is there any source or any person who is particularly influential in giving career advice?
- Are you involved in any sports, fitness or organised activities on a regular basis?
 - If yes: what sports, fitness or organised activities?
 - If no: what do you like to do in your spare time?
 - Do you consider yourself to be in good physical shape?

I'm going to ask you to watch a short video about physical activity. It's about 1min 30 seconds long.

- Do you feel with your current level of fitness that you could complete those tasks?
 - If not, how long do you think you would have to train to accomplish those tasks?
 - Do you think many of your friends would be able to accomplish these tasks?

Questions about the Lucy Scenario (see script at the end of the interview guide)

Now I would like to refer to the scenario that you read before the interview.

- Can you tell me what you think of Lucy's professional life?
- Would you see yourself having a career like Lucy's?
 - If yes: What do you identify with in her story?
 - If no: Why not? (and what specifically in the scenario gave them that idea?)
- What do you think most women in Canada would like about Lucy's job?
 - What about dislikes?
 - If not mentioned: What do you think about Lucy working out during working hours?
 - Do you know of a job/company that would allow you to work out during working hrs?
- Think of everyone you know, who is the most "Lucy"? Would any of your friends or people you know in your age group aspire to be Lucy? Why? Why not?
- Based on the information you were given; can you describe me what kind of person Lucy is?
 - Does she represent any women that you know?
 - Do you think Lucy represents women in Canadian society? Are the Lucys in the majority in Canada, or in the minority?
- Take a guess: what do you think Lucy's job is? Who could be her employer?
- What kind of challenges does Lucy face in her job?
 - What about being in charge of an all-male team? What about the hands-on aspects of Lucy's job? What about the risk factor when Lucy is employed overseas?
 - Are these challenges representative of challenges most women face in day to day life?
 - Are there jobs or employers where women face these challenges? Are women more pulled to these jobs?
- What other jobs do you associate with these characteristics? (Prompt to military if required.)

I would like us to move on now and talk a little bit about the Canadian Armed Forces.

- What do you know about the Canadian military? (If participant not aware, probe with: what about the different jobs? The work environment? Some of the tasks they do?)
- What do you think a military life in the Canadian Armed Forces entails?
 - Why is that?
- What do you know specifically about the Combat Arms?
 - Where did you learn about that?
 - (if no knowledge, explain what combat arms is):

Combat Arms is a term used to describe the part of the military responsible for providing operational assistance for the combat elements. This includes

infantry, artillery, armoured, and engineering. For example, infantry soldiers who provide peacekeeping assistance in another country and armoured personnel who operate tanks. When not in combat they would be the ones on patrol, teaching, or here at home they are the majority of military folks filling sandbags during floods or helping with fires etc.

Does that make sense?

- If I told you the CAF are trying to recruit more women in the Combat Arms, what do you think about that? Why do you think that?
- What do you think about the Canadian military in general?
 - Probe: How did you come to think of the military like this?
 - What is your opinion on what the Canadian military does (missions)?
 - What do you think your female friends in particular think? Why is that?
- If you were to have a job in the military, who do you think your friends and family would feel about this? What would they say?

We've covered your awareness of the Canadian Armed Forces, and your opinion about the organisation, and I'd like to hear your thoughts on the kinds of barriers or obstacles you think women in the military may or may not face.

- Can you think of some of the barriers or problems female soldiers may face, or may need to overcome in her day-to-day work?
 - Why would you say that?
- What are your thoughts of working in an all, or mostly, male team?
 - Do you think any of your friends would do well in this kind of environment?

Many kinds of careers require the use of force, such as police officers, border security, etc. Like these other careers, members of the military may need to use force in her career.

- What does the phrase, "lawful use of force" mean to you?

Military members are trained in the use of firearms.

- How do you feel about the use of firearms?
- What do you think some of the mental and physical challenges of a job in the military combat arms might be?
 - What makes you think that? How does that make you feel?

Revisit the Lucy narrative

Let's think back on the narrative you read about Lucy. She is in fact in the military.

- Does that raise any thoughts or questions for you?
- Does it change what you thought before about a military lifestyle, or add to it in any way?
- What aspects of how you remember the story stand out for you now, and why?

- Are there any aspects of Lucy's lifestyle that differ from what you want out of your life?
 - Probe: If not answered, then ask about work-life balance, geographical barriers, family, and pay
- Do you know that there is a part-time (Reserve) option in the Canadian Armed Forces?
 - If yes: How did you learn about the part-time option?
 - If no: What if I tell you that the Lucy Scenario can be done part-time, as a Reserve. Could you see yourself doing that?
- Does a part-time option in the Canadian Armed Forces appeal to you?
 - Why? Why not?

Going back to the video of the physical test I showed you, this test is actually the basic physical fitness test all military members like Lucy do every year.

- Did you know before seeing the video what the Canadian Armed Forces physical test was?
- Was it what you expected the test to be?
- What do you think about it now?

I would like to end with a few questions specific to advertisement.

- Can you think of an advertisement that you remember because you really liked it or it resonates with you in some way?
 - Which one? What/why is it about the advertisement that appeals to you?
- If the Canadian Armed Forces was trying to attract the attention of any of your female friends to the possibility of joining the Combat Arms, what kinds of channels might be effective for reaching them?
 - (prompt if necessary: Commercials? Where or on what media? Social media ads? On what platforms? Text ads? In what contexts? Booths? Where--Schools? Events? Other Locations?)
- If the CAF was going to feature a specific person in ads recruiting young women into the Combat Arms, what individual or kind of person do you think would make these ads more compelling or exciting for you or your friends?
 - (Prompt – what kind of individual would get your attention? What kind of individual would you take seriously? Is there any kind of individual who would be a turn-off in that kind of ad?)

I've asked you all of my questions now. I'm just going to check with my colleagues if I have missed anything or if they have any questions.

Before we finish the interview;

- Is there anything you would like to add?
- As you may have guessed from some of the questions, I work for the Canadian Armed Forces myself, and as part of our course we are conducting a case study into people's interest in a career in the Combat Arms.
- Do you have any questions before we finish the interview?

Thank you very much for participating in this research!

At the end of the interview, take the respondent back to the reception, thank them again and hand them over to the host(ess) who will provide them with their incentive.

(The following scenario was handed to research respondents when they came in for their interview, to read in the waiting room):

“Lucy” Scenario

Instructions. Please read the following fictional scenario carefully. You are not required to memorize any of the information. However, you will be asked to provide your thoughts and opinions about certain elements of this scenario. You will be allowed to ask questions and refer back to this sheet during the interview (this is not a test).

Beginning of the Scenario

This morning, Lucy and her partner woke up at 5:45, they prepared the kids for school and left for work. Lucy and her partner live in a nice neighborhood – her annual salary of 75,000 plus benefits means they were able to purchase a new home last year. Lucy is 29 years old.

Once Lucy arrives at work, she goes to the gym. Her employer values personal fitness and provides time for employees to hit the gym every day during working hours.

At 9:30, it's time for the daily meeting with her team of eight men. Lucy coordinates and delegates the work to be completed today and starts looking a few weeks ahead. At 11:00, Lucy meets with her boss, Jeff, along with the other middle-managers of her company. She then goes back to her team to make sure everyone is on the same page.

The rest of her day consists of planning, since her company will be executing a project in the field next month. If the project is successful, there is an opportunity for a work trip overseas. She has one last meeting before having a fun lunch with her colleagues. During the afternoon, it is brought to her attention that a member of her team did not follow important rules during a job last week. Consequently, she spends the rest of her day figuring out some disciplinary measures. At 3:30 she heads back home and arrives just in time to greet the kids as they get off the school bus.

Tonight, after dinner, she heads to hockey practice where she is the assistant coach. Before bed, she prepares for tomorrow where she will be testing some aspects of the field project – time to take out the boots and rain pants – her favourite part of the job is getting hands on and getting some dirt on her shoes.

Fast forward a month and it is time to go out and complete that field project – she will be away from home in a remote location for three weeks. Her partner will be running the house and taking care of the kids while she is away, and her mother is available to help if need be. While completing the project, the hours are very long, and the days can be extremely demanding. But

all the planning pays off and, in the end, she leaves feeling tired but accomplished. She managed her team well, and they achieved their goals – overcoming unexpected challenges along the way.

Fast forward again, and the success of the field project means that the company will be working overseas for several months. This was anticipated and her partner is ready to support her on this adventure. Her employer has made sure that her family will be supported while she is away, and she has spent time preparing her children for the time apart. Lucy will be able to talk to her family most days, and they will see each other in Florida half-way through her time away. This vacation time is a planned part of the project, and the additional pay benefits provided while away mean they can afford this fantastic trip. The country in which her company will be working is unstable, and the job does include several risks. However, Lucy and her team are well prepared, and they have back up plans just in case. Once again, the job will be demanding, but Lucy feels the work is important and feels that she has made a difference in the world.

Homecoming is always the best part of being away, and Lucy is excited to spend some time with her family in the coming weeks – the company pays for her to have three weeks off from work, above and beyond her usual vacation days.

Returning to work means it is time to start looking ahead as well – the experience overseas means she will likely be promoted soon. She knows she likely won't be travelling for the next two years, so Lucy also has a plan to further her education, which her company will support, and further her career goals.

End of the Scenario

Appendix F: Quantitative Survey Instrument

Thank you for completing this short questionnaire. Please read each question carefully and select one response from the available options that best represents how you feel. Make sure you answer every question and only select one option per question.

1. Have you ever seen or been given information about careers in the Canadian army?

Yes	No
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If 'yes' to the above, how recently was the last time you were given information about Canadian army careers?

Not in the last year	Within the last year	Within the last six months	Within the last 3 months	Within the last month
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2. Thinking of the careers you might pursue now, would you say working for the Canadian army is...

Not something I'd ever consider	Something I'd consider, but low on the list	Something that is actively in the mix of careers I'm contemplating/would contemplate	A career I'd be/am interested in pursuing	A career I am actively interested in pursuing
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3. As a general impression, would you say that as an organization, the Canadian army is...

Very high quality	High quality	Of some quality	Not too good	Of poor quality	Of very poor quality	Have no view one way or another
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Please answer to what extent you agree or disagree with the following statements:

4. I am put off a career in the Canadian army because I am worried about getting injured or traumatised

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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5. I feel the Canadian army is an unacceptably high-risk or dangerous career choice

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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6. I am not physically and/or mentally 'tough enough' for the Canadian army

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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7. I have a good understanding of the different employment opportunities for women within the Canadian army

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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8. A career in the Canadian army would be a good option for me

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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9. I am aware that the Canadian army are actively seeking to recruit more women

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
-------------------	----------	-------------------	----------------------------	----------------	-------	----------------

10. The Canadian army is a place where men and women with various backgrounds and interests can find a good career.

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
-------------------	----------	-------------------	----------------------------	----------------	-------	----------------

11. I could not do a job that required me to be away from my friends and/or family for extended periods

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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12. I am capable of reaching the required level of physical fitness for a Canadian army career

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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13. I would do a job that involves frequently moving around the country

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
-------------------	----------	-------------------	----------------------------	----------------	-------	----------------

14. I would not pursue a career in the Canadian army because it just isn't 'who I am'

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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15. My parent(s)/guardian(s) would approve of me having an army career

Strongly Disagree	Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat agree	Agree	Strongly agree
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Suggested Grouping Variables: Age, Education, Location, Occupation, Ethnicity

Appendix G: Focus Group Interview Guide

Audience:	Females 16-25 in Ottawa
Date Interview Guide:	4 November 2019
Date Research:	5 November 2019
Type of Research:	Face-to-Face Focus Group
Number of participants:	6 (plus two facilitators)
Duration:	Approximately 2 hours

Introduction

Good afternoon, we are

Nice to meet everyone and thank you for taking the time to be here today.

I am a student on a course that teaches research techniques including interviewing. I can tell you more about it after the interview, because doing so first might influence the answers you provide.

Let me start by thanking you for participating in our research. We are here today to conduct a study about women in non-traditional careers and more specifically in the career in the Canadian Armed Forces. We are going to use the terms Canadian Armed Forces and “military” interchangeably, they mean the Canadian Military, which includes the Navy, Army, Air Force and Special Forces.

Your insight is extremely valuable to us. Before we begin, I would like to mention some general points for today’s interview.

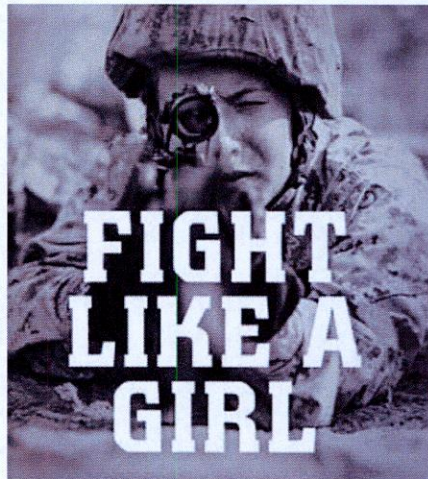
- As you hopefully already know, we record this session so I can go back and write my report. This recording is for the sole purpose of the research and will not be distributed or published in any way. It’s just to make sure we capture all of your valuable thoughts. Your answers will be anonymous and won’t be linked to any of your contact details or your name, and you won’t be identifiable from the report.
- There are also a few of my colleagues watching my interview to see how we are doing!
- You will have received the interview consent form when you arrived; do you have any questions about this? May I have your signed copy?
- The interview will take approximately 2 hours.
- Everything you say is important to us and we want to hear what you, personally, think about various things. That said, you don’t have to answer any questions you don’t wish to answer, and you are free to terminate the interview at any time. We are hoping to have a completely free and open discussion. No stupid questions and no stupid answers.

Ground Rules and Introductions

We will do introductions in a minute, but first a few ground rules to make sure we all get the most out of this focus group, and that we have a successful and enjoyable time.

- Everyone will have the opportunity to speak – please don't speak over each other. If someone brings up a point for you, put your hand up and we will note it to come back to you as soon as we can.
- Everyone has the right to their opinion, and we will respect each other's opinion. This focus group is not about creating consensus but about hearing your opinions, so we welcome everyone's thoughts.
- We are here to moderate the conversation, not lead the discussion. Talk and discuss among yourselves as a group, and we will interject as required.
- In order to ensure we use our time effectively, we may stop or redirect a discussion. This is not personal at all, and is done only to make sure we stay on track.
- There will be a very short five-minute break at the halfway mark (around one hour).
- Are there any questions?
- Ok, onto the introductions. We would like to know where you are from, and where you live now, how old you are, and what you do – School, work etc. As well, a quick sentence on what you know about, or your exposure to, the military.

Fight like a Girl (Slide 1 - image shown on the TV screen in the room)



- What do you think of the image and words?
- What do you think is meant by "fight like a girl"?
- Do you think the statement is complimentary, or derogatory?
- Are there any other expressions or sayings that you particularly like or dislike?

Three Pictures (Slide 2 - image shown on the TV screen in the room)

Group 1



Group 2



Group 3



- Describe the people in these three pictures.
- What do you think defines the bond between the people in each picture?
- How do the personalities and the bonds between the people differ between each group?

Turn to blank slide 3

CAF Role

- What do you think is the role of the Canadian Armed Forces in Canada today? In the world today?
 - What about the role of women in this institution? How do you think women in the CAF contribute to the things you were just discussing (Insert thing here)? Do you think that women have equal chances to succeed in the military.

If you could please read the following statement, (Slide 4 - shown on the TV screen)

The Canadian Armed Forces is aiming to increase the proportion of women within its ranks at the rate of one per cent per year for the next 10 years, said the Chief of the Defence Staff.

In a speech on International Women's Day on March 8, General Jonathan Vance said increasing the number of women in uniform is "not about equality – it's about operational success."

It is clear to me that diversity within our ranks plays a pivotal role in making our military more effective," he said. "My goal is to increase the percentage of women within our ranks by one percent per year, until we reach our target of 25 per cent."

- What do you think of this statement? Do you agree or disagree?
- What do you think is meant by “operational success”?
- How do you think “operational success” can be increased by recruiting women to the armed forces?
- What do you think women can bring to the armed forces that would be missing in an all-male military?

Turn to blank slide 5

Recruitment

- The Canadian Armed Forces offers a very attractive employment package. They have a higher-than-average salary, completely equal pay for men and women, full benefits for the member and their family, yearly raises, education opportunities, travel and a job where you can be a leader at a very young age. They go out and make a difference in the world, help during domestic crisis in Canada and are an institution with long-standing proud traditions and are generally respected within our country. Despite all this, we have a very hard time recruiting women – why do you think that is?
- What if we told you that the military offered all the above, along with the opportunity to work with a very tight-knit team, to accomplish yourself and to become all the things that you are capable of becoming.
 - Challenge respondents with work/life balance examples in a typical military life (ex. what if I told you that it is totally possible for a woman to have a family and pursue a career in the Canadian Armed Forces at the same time).

Binaries (Slide 6 - image shown on the TV screen in the room)

Binaries/ Opposites

Civilian	Military
Choose my own clothes	Wear a uniform every day

- We are now going to do a bit of an interactive exercise with binaries– these are things that you think about military or civilian life that are opposites, for example in the military you have to wear a uniform, as a civilian you get to pick your clothes. Oli/Christine will keep track of these throughout the exercise and write them on the board, so let us know what you think could be some binaries, and why.
 - Explain, Why?

Move to blank Slide 7

Use of Force

- We're going to talk about a concept called "use of force" now, so first, what comes to mind when we say use of force? What about "show of force"?
- Does physically restraining someone count as use of force? Does pepper spray count as use of force? Does a police baton count as use of force? (Prompts for questions about escalation of force)
- So, if you are in an escalating situation, do you think that at some point the only option is the use of force that could kill someone?
- Do you think that police may have a justifiable reason to use force in the course of their duties?
- Do you think that the military may have a justifiable reason to use force in the course of their duties overseas or in protecting Canada?
- Do these opinions match with your own thoughts about the use of guns? Why or why not?
- Do you think that the requirement to be able to safely handle, and possibly use, a gun is a barrier for people to join the military? For women in particular?

Halfway mark

CAF Identity: Ethics and Morals

- Do you think the Canadian Armed Forces is an ethical organisation? A morally strong organisation?
- Do you think that the Canadian Armed Forces ethics and morals generally align with Canadian ethics and morals?
- What ethics and morals of the military are different than yours/Canadian's?

Women in the Canadian Armed Forces – Social

- Is it still a societal norm in Canada that women are the primary home-makers and in charge of children? Do you think the average woman wants a family and that lifestyle?
- If so - Do you think women in the military can also have those things?
- What about military life would be compatible with the life that most women want? What is incompatible?

CAF Identity: PTSD

- We have conducted a number of interviews on this particular topic over the past weeks with young women like you. In our interviews, we have seen that PTSD is a concern for people who may be considering joining the military, and that several people think it is just something that happens with almost all military service.
 - Do you agree? Why, why not?

- Are there ways to be more resilient or mentally tough and be able to overcome difficult or possibly mentally damaging situations?
- Are men and women equally likely to get PTSD if faced with the same situation?
- Do women have any attributes that might help them overcome these types of situations? Are they more vulnerable?

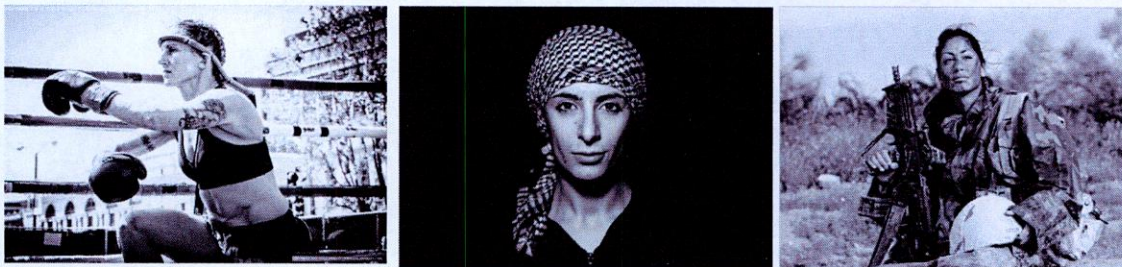
CAF Identity: Mental Strength

We are going to show you some photos (Slide 8 - image shown on the TV screen in the room)



- If you had to nominate one of these women as a true hero, which one would you choose based solely on what you can deduce from the images?
 - Would you say any of them show strong women? Why or why not?
 - And a slightly nuanced and difference question, do any of them show female strength? Is there a difference between “female strength” and “male strength”?

Now, what about these three women... (Slide 9 - image shown on the TV screen in the room)



- Would you say any of them show strong women? Why or why not?
 - Which one of these images best represents the enduring strength of women?
 - Some people think that women have more internal, enduring, strength than men, do you agree?
 - Do you think people need mental strength to join the military?

- Do you think women in particular need mental strength to join the military? Do you think that women your age have that strength? Why, why not?

Provocative Quote (Slide 10 - image shown on the TV screen in the room)

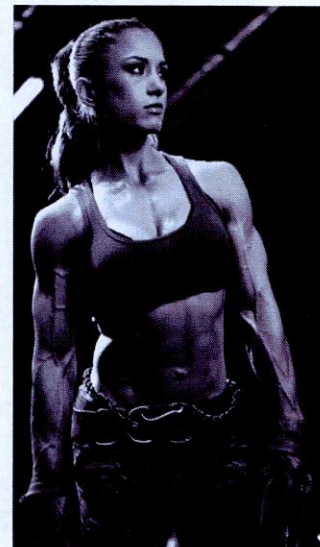
“ Women definitely have a vital role to play in the military. We need people to process information, compile reports, organize important meetings and take confidential notes. We need care for the injured, medical support, troops need assistance. There are an abundance of roles that women can do to support the men who are out in the field of combat risking their lives in physically dangerous situations.”

- Take a minute to read this statement – what’s the first thing that comes to mind? Do you think it is true?
- Do you think that women can only fulfill these kinds of roles in the military?
- Do you know that women can be any trade in the military, including front-line soldiers? When do you think that happened (that all trades became open?)
- Do you think women are suited for all roles in the military? Are there some that are more suitable for women?
- What skills do women have particularly that could be useful in a military role? (probing for time management, communications, multi-tasking, etc.)
- Are there roles in the military that women should not do? Why not? Do any of the skills mentioned above translate to these trades?

Male Gaze (Slide 11 - image shown on the TV screen in the room)

And finally, ending with another image; take a few minutes to look at the picture...

- What words would you use to describe this person?
- Do you think the picture is for the viewing benefit of other women?
- Do you think the picture was taken for men to enjoy?
- Do you think the picture is intended for an audience that is not specifically male nor female but perhaps for an audience with an interest in something specific like an activity?
- Do you think the picture looks authentic, or fake in any way?
- Do you think the person in the picture looks natural, confident, strong... heroic?
- Does the picture inspire you in any way?
- Does it lead to any negative or critical thoughts?



Appendix H: Acronyms and Glossary of terms

Parameter Acronyms

Throughout the document, Parameter information can be found at the end of interview quotes using the following key:

DESCRIPTIVE	CODE	PROGNOSTIC	CODE	TRANSFORMATIVE	CODE
Audience Statistics	STATS	Beliefs	BEL	Ability	AB
Channel Credibility	CC	Fragility / Resistance	FRAG	Attitudes	ATT
Channel Exposure	CE	Ideology	IDEO	Binary Opposition	BINARY
Current Behaviour	CB	Influenceability	INF	Common Enemies	ENEMIES
Financing	FIN	Informational Reliance	IR	Decision Path	DP
Group Composition	GC	Instrumental Behaviour	IB	Expectancy	EXP
Group Membership	GM	Intent	INT	Fears	FEAR
Historic Context	HC	Locus of Control	LOC	Filters	FIL
Language	LANG	Motivations	MOT	Initiating Sets	IS
Leadership Structure	LS	Normative Affiliation	NA	Message Appeals	MA
Literacy	LIT	Polarising Motivating Propensity	PMP	Noise	NOISE
Mission	MISS	Power Structures	PS	Reward Structures	RS
Needs	NEED	Propensity for Change	PFC	Rituals	RIT
Relevant Issues	RI	Skill	SKILL	Source credibility	SC
Size	SIZE				
Values and Norms	VALS/ NORMS				

Figure 14: Parameter Acronyms

Other Acronyms

AAA	Actor and Audience Analysis (also called TAA: Target Audience Analysis)
BDM	Behavioural Dynamics Methodology
CAF	Canadian Armed Forces
CIS	Campaign Intervention Strategy
DB	Desired Behaviour
MBO	Measurable Behavioural Objective
MOE	Measurements of Effectiveness
NDB	Non-Desired Behaviour
PSM	Problem Space Map
SCP	Strategic Campaign Planning
TAA	Target Audience Analysis (Also called AAA: Actor and Audience Analysis)
TG	Target Group

Parameter Definitions:

Ability: Ability is the quality of being able to do something in the present, including the physical means needed to perform a behaviour.

Attitudes: Attitudes are independent measures of affect for or against an attitude object, identifying what is important to a target audience and which levels should be pulled to create change. Understanding the perception of the TG helps to identify what is important for them and what levers can be pulled to create change.

Audience Statistics: Audience Statistics are the demographics (age, race, sex, etc.) of a population. Audience Statistics are basic but essential filters for any successful campaign.

Beliefs: Beliefs refer to the psychological state in which an individual holds a proposition or premise to be true.

Binary Opposition: A binary opposition is, simply put, a pair of opposites (e.g. savage vs. civilised). Structuralist theory asserts that such binary oppositions constitute essential organisers of human experience and thinking, and thus may determine behaviour.

Channel Credibility: Channel credibility is the perception of a channel's message believability through evaluation of the strengths and weaknesses of a channel, and gives us an idea of the issues affecting the message. It allows us to discover how a message should be designed and distributed through the appropriate channels.

Channel Exposure: Channel exposure refers to the experience of an individual or a group with a channel of communication, specifying how much they are actually exposed to it. The dissemination of the message must be done through accessible channels, in particular through those to which a group has a favourable disposition, or else the message could possibly be ignored.

Common Enemies: Groups can be united not by their positive bonds with one another, but by their mutual antipathy for a third party. Common enemies need not be someone who the target audience is in violent conflict with; it can just be a disliked out-group.

Current Behaviour: The current behaviour of a target audience encompasses that audience's existing practices and actions, including those that a strategic communication campaign is intended and designed to alter. Current behaviour helps in identifying a highly influential Target Audience. Various culturally bound behaviours may affect the reception of a message. Understanding current behaviours can provide a potential entry-point to understanding a specific Non-Desirable Behaviour, and may in turn suggest the means to change it, and how to generate messages (in culturally meaningful terms) that persuade people to change it.

Decision Path: Decision path refers to the series of decisions people take and which progressively increase their predisposition to a particular behaviour.

Expectancy: Expectancy is a group's confidence that its efforts will produce a certain level of performance.

Fears: Fears are emotions induced by a perceived threat.

Filters: The human mind cannot process all incoming information, and thus filters out much of what is irrelevant to current goals and preferences. Certain messages will be 'filtered' as irrelevant in accordance with specific cognitive or motivational biases.

Financing: Ideology refers to the body of doctrine, myths, beliefs, etc., that guide a social movement, institution, class, or (large) group.

Fragility/Resistance: This Parameter assesses the strength of a group and how easy it is to break up or split the group.

Group Composition: Group Composition is defined as the aspects of a group that are created by the configuration of group member attributes. Within groups, there may be heterogeneity of certain demographic characteristics, such as age, sex, nationality, and ethnicity. However, groups may also be formed purely on the basis of a shared goal, and it is at all times important to understand the makeup of a group we intend to change through a campaign.

Group Membership: Every individual within a target audience defines his or her identity by way of a number of different, though often overlapping, reference groups. In turn, Group Memberships constitute the various categories of persons to which an individual in a particular target audience might belong and by which she or he might define his/her identity, at least in part.

Historic Context: Historic Context refers to developments that have contributed to shaping the tendencies of the target audience over time. Typical historic elements include long-standing trends as well as particularly influential events.

Ideology: Ideology refers to the body of doctrine, myths, beliefs, etc. that guide a social movement, institution, class, or (large) group. In the words of two researchers, it is a "set of beliefs about the proper order of society and how it can be achieved" (Denzau and North, 1994). It may be distinguished from Mission in that Ideology offers a wider analysis which helps to generate particular missions.

Influenceability: Influenceability describes the amenability of a particular population to external influence. The higher the Influenceability demonstrated by a group, the more susceptible the group is to outside sources of influence.

Informational Reliance: Informational Reliance refers to a target audience's tendency to seek and absorb instruction from a relevant group because that group is perceived by the audience as a genuinely helpful source of instruction.

Initiating Sets: Initiating sets are groups of people among the target audience whose particular qualities allow them to act as catalysts in communication campaigns. It allows us to identify the most effective means of disseminating information, and share the right information with the right people.

Instrumental Behaviour: An Instrumental Behaviour is an action performed to reach a goal, in order, for example, to obtain something, to achieve a reward or to remove a punishment. Typically, the behaviour causes the desired outcome.

Intent: Intent refers to the desire to complete an action or behave in a particular way.

Language: Language is the fundamental medium of communication. Language consists of a shared body of words and an accepted system for their use. It is a means of communicating and understanding thoughts and ideas, for giving us a higher level of knowledge than can be gained simply by our own experience of the world. We use language as a means of understanding the world. As the scholar Benjamin Whorf explains, language can shape thoughts and emotions, determining one's perception of reality. The important role of language in shaping our thoughts and opinions means that it is a fundamental tool for strategic communication.

Leadership Structure: The Parameter Leadership Structure seeks to identify leaders among groups and to delineate the structures in which they are ordered.

Literacy: Literacy is defined as the ability to read and write (Chambers 21st Century Dictionary). Its modern usage implies that if someone is literate then they are able to read and write at a level adequate for communication. Audience Literacy is crucial to any written strategic communication. A literacy rate provides the percentage of a population that can read and write at a level adequate for written communication.

Locus of Control: The concept of Locus of Control has a long history in the social sciences. The traditional definition of Locus of Control refers to an individual's perception of where control over the events that take place in their lives resides, or (in other words), who or what is responsible for what happens to them. Control can either be internal or external. Groups and individuals with an internal Locus of Control feel that the circumstances are under their control, while groups and individuals with an external Locus of Control feel their fate is attributable to luck or determined by people with authority, deities, spirits, etc. 'High' Locus of Control is also called 'Internal' Locus of Control, while 'Low' Locus of Control indicates an 'External' Locus of Control. It is important to know whether a group has an internal or external Locus of Control because there are important differences between how the two groups are motivated, how they respond to external messages and how they respond to external influences. These differences have direct relevance to the degree to which behaviour can be changed and how one should go about doing so.

Message Appeals: Message appeals are the type or style of appeals to which a Target Audience most readily responds, for example by invoking fear, utilising humour or using rational arguments. It can indicate how a message must be conveyed.

Mission: Mission refers to a group's strong felt aim or ambition, which can be the sole reason for the group's existence. Mission may be distinguished from Ideology, since it has a stated practical aim, whereas Ideology is a wider analysis that supports and validates the Mission.

Motivations: Motivations are driving forces that initiate, direct, intensify, and maintain a specific behaviour. The Motivations underpinning a particular behaviour are often numerous and diverse, both in nature and intensity. When studying motivations, the Behavioural Dynamics Methodology distinguishes between intrinsic motivations (called Motivations in this study) and extrinsic motivations (called Reward structures in the Behavioural Dynamics Methodology).

Needs: A Need is a requirement that is essential or very important to a group, as opposed to a desire.

Noise: In communication theory the reception of a message/signal can be interfered with, depending on the degree of informational noise in the environment. Communication will be more readily perceived – and more attended – when the number and frequency of competing messages is low.

Normative Affiliation: Normative Affiliation describes the propensity of individuals to conform to, and identify with, group norms. Similar constructs within the academic literature include 'conformity', 'individual-ism/collectivism' & 'independence/interdependence'.

Polarising Motivating Propensity: A target audience's Polarising Motivating Propensity (PMP) describes the extent to which 'normal' expressions of certain research parameters are drastically changed when measured in the context of an enemy or other factor (trigger) that evokes intense emotion in the audience.

Power Structures: Power Structures describe how decisions are made and obeyed within a given population. Formal Power Structures refer to those actors that are officially recognised as sources of authority, such as a king or a president. Informal Power Structures, on the other hand, are individuals or groups who, although not officially recognised as authority figures, hold sway over a particular audience, such as elders.

Propensity for Change: A target audience's Propensity for Change indicates the extent to which that target audience is predisposed to seek change for its own sake, whether with or without a particular rationale.

Relevant Issues: Relevant issues consist of the target audience's views, histories, aspirations, fears, and other matters pertaining to the particular issue that is being addressed by means of a strategic communication campaign.

Reward Structures: Reward Structures are systems through which rewards (financial and non-financial) motivate people towards a particular course of action or influence preference for one of a number of choices. Rewards and punishments are effective ways of providing external justification for actions. Rewards may be used to gain compliance or to adjust attitudes, depending on the size of a reward or severity of a punishment. Studying the current systems of reward structures surrounding behaviour can determine the appropriateness of a proposed reward, or help to 'out-bid' those offering rewards for competing behaviours.

Rituals: Rituals are those habitual, stylised activities that we enact, or participate in, to affirm and outwardly signify our membership of a particular group. They are powerful events that can solidify an identity and unite a group.

Size: Group Size refers simply to the number of individuals in the group under study.

Skill: Skill is defined as the aptitudes appropriate for a specific job or behaviour. They are proficiencies developed through training or experience, such as reading and writing skills or computer skills. Skills are usually something that has been learned.

Source Credibility: Source credibility refers to the subjective and objective perception of the trustworthiness, expertise, and attractiveness of a communication source. It tells us where messages should be disseminated and to which messages an audience may already be exposed to.

Values and Norms: Values are strong, semi-permanent, abstract and sometimes implicit dispositions held by a group or society. Despite being non-material, they exert a powerful effect on behaviour. Through understanding a group's value structure, it is possible to identify what is important to the target audience, and what levers to pull to create change. They may conjure powerful emotional responses. If an influence campaign is associated with positive values it is more likely to succeed, while if it is associated with negative values (or contradicts positive values) it is likely to be rejected.

Glossary of Terms

Behaviour: An observable, measurable way in which a person or group acts in response to a particular situation or stimulus.

Campaign Intervention Strategy: A practical, evidence-based change strategy that forms the basis of a strategic communication/behaviour change campaign.

Emic Logic: An approach to analysing the accounts, narratives of a group that is expressed in terms of conceptual schemes and categories regarded as meaningful and appropriate by the members of that group.

Factors: Basic disaggregated elements of a problem that causally contribute to either its perpetuation or mitigation.

Group: A number of people located, gathered, or classed together on the basis of shared belief systems, location, interests, struggles, motivations, or characteristics.

Group-Behaviour Pairs: Combination of groups and associated behaviours that are amenable to being impacted by a campaign, and that could also make a significant difference to project objectives.

Indicators: Measurable evidence and signs through which an intervention, a program, or a project can be assessed and evaluated.

Parameters: Variable, measurable features of individual and group psychology, sociology, culture, and communication contexts which can help with understanding how groups and individuals feel, function, aspire, evolve, and process information.

Strategic Campaign Planning: The process of identifying the most available and viable group to target with a communication campaign or other intervention.

Target Audience: The population for which a campaign is intended and designed, which may be either a group in whom change is desired, or an alternative audience that has influence over that group. Often interchangeable with **Target Group**.

Target Audience Analysis: The process of analysing a relevant audience to identify the most appropriate and effective method of communicating or otherwise intervening with that audience.

Appendix I: References

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s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January 16, 2020 7:11 PM
To:
Subject: Re: Report sharing

Of course. Feel free to share with

Sent from my BlackBerry 10 smartphone on the Bell network.

From:
Sent: Thursday, January 16, 2020 6:50 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull;
Subject: Report sharing

Dear LCol Allison and Maj. Bowen,

In follow-up to my last email; I met with
earlier this week (I believe you both know her) and she sends her regards. She told me she
will be visiting Canada soon and asked if her boss may have a look at your course report
since they have an interest in both the topic area and the BDM research component. I
promised I would ask you on her behalf.

With kind regards,

www.emicconsulting.co.uk

emic Consulting

s.19(1)

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: January 16, 2020 7:13 PM
To: Janzen BGen JH@ADM(PA) DPAP0@Ottawa-Hull
Subject: Fw: sent you files via WeTransfer

Sir, final report from AAA course attached
Sent from my BlackBerry 10 smartphone on the Bell network.

From: WeTransfer <noreply@wetransfer.com>
Sent: Thursday, January 16, 2020 7:04 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Reply To:
Subject: sent you files via WeTransfer

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to
Download
images!

sent you some files

1 item, 24.8 MB in total • Will be deleted on 24 January, 2020

Dear LCol Allison,
Please find the Live Case Study report attached here.
With kind regards,

[Get your files](#)

Download link

<https://wetransfer.com/downloads/4d6a8a90bcb3ca8ddf0c5de85bb5032720200117000343/ff1b9caa27690c01238201ef7fa2acbd20200117000343/1e40f7>

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From: [Allison LCol DE@ADM\(PA\) DPAPQ@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 17, 2020 1:40 PM
To: [Kapp R@ADM\(PA\) DPAPQ@Ottawa-Hull](mailto:Kapp.R@ADM(PA).DPAPO@Ottawa-Hull); [Phillips KA@ADM\(PA\) DPAPQ@Ottawa-Hull](mailto:Phillips.KA@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: W6369-19-X033/A - TAA - Contract Award
Attachments: W6369-19-X033A - Award letter and contract.pdf

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-08-19 10:57 AM
To: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: FW: W6369-19-X033/A - TAA - Contract Award

Hello Doug,

The email below has been sent to Emic Consulting Ltd. As they have now been awarded the contract, you can contact them to begin work.

The contract is attached for your reference.

Please let me know if you have any questions.

Regards,
Holly

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July 8, 2019 10:55 AM
To:
Subject: W6369-19-X033/A - TAA - Contract Award

**Target Audience Analysis:
Contract Award**

REFERENCES: DND Reference No.: W6369-19-X033/A

Good day

Thank you for submitting a proposal addressing the Department of National Defence requirement for Target Audience Analysis training.

Please find enclosed the resulting Award Letter and Contract. Please sign and date the contract cover page and return to me.

Should you have any questions, please do not hesitate to contact me. My coordinates are below.

Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contrats de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca/ Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada

A0447862_1-001258

Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

s.19(1)

UNCLASSIFIED



National Defence
National Defence Headquarters
Ottawa, Ontario
K1A 0K2

Défense nationale
Quartier général de la Défense nationale
Ottawa (Ontario)
K1A 0K2

Solicitation Number: W6369-19-X033/A

08 July 2019

Emic Consulting Ltd.

Dear

Thank you for submitting a proposal addressing the requirement for the Target Audience Analysis for the Department of National Defence. The evaluation has been completed and I am pleased to inform you that Emic Consulting Ltd. is the successful bidder.

Please find enclosed the resulting contract. The initial contract period is valued at \$615,285.00 CAD, applicable taxes included.

Your demonstrated interest in providing services to the Department is very much appreciated. If you have any questions, please contact me at 819-939-8478 or holly.brousseau@forces.gc.ca

Sincerely,

Holly Brousseau
Senior Procurement Officer

Enclosure

UNCLASSIFIED

Canada

s.19(1)



National Defence

Défense nationale

National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2

**DND CONTRACTING AUTHORITY
 AUTORITÉ CONTRACTANTE DU MND**

National Defence Headquarters
 Director Services Contracting 4 (D Svcs C 4)
 101 Colonel By Drive
 Ottawa, Ontario K1A 0K2

CONTRACT/CONTRAT

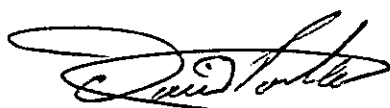
The referenced document is hereby amended; unless otherwise indicated, all other terms and conditions of the contract remain the same
 Ce document est par la présente modifié : sauf indication contraire, les modalités du contrat demeurent les mêmes.

The Vendor/Firm hereby accepts/acknowledges this contract.
 Le fournisseur/entrepreneur accepte la présente contrat/en accuse réception.

Signature _____ Date _____
 Name, title of person authorized to sign (type or print)
 Nom et titre du signataire autorisé (taper ou imprimer)

**NAME AND ADDRESS OF CONTRACTOR
 NOM ET ADRESSE DE L'ENTREPRENEUR**

Emic Consulting Ltd.

Title – Titre Target Audience Analysis	
Contract No. – N° du contrat W6369-19-X033/A	
Client Reference No. – N° de référence du client	Date 05 July 2019
Financial Code(s) – Code(s) financier(s) Fund : L101, Fund Centre 0161SC, General Ledger 4927, Internal Order 2505009 Destination See herein – Voir ci-inclus	
Invoices – Original must be completed and sent to: Factures – La facture originale doit être remplie et envoyée à :	
Invoices must be completed and sent in accordance with the section titled "Invoice Instructions" in the Contract. Address Enquiries to: – Adresser toute demande de renseignements à :	
Holly Brousseau Senior Procurement Officer, D Svcs C 4-2-5, holly.brousseau@forces.gc.ca	
Telephone No. – N° de téléphone 819-939-8478	FAX No. – N° de fax
Total Cost (including all applicable duty, GST/HST, shipping and excise taxes) Coût total (droits, TPS/TVH, frais de livraison et taxes d'accise compris) \$615,285.00 (CAD)	
For the Minister – Pour le Ministre 	



Contract No. W6369-19-X033/A

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Contract No. W6369-19-X033/A

CONTRACT CLAUSES

1 Security Requirements

There is no security requirement applicable to the Contract.

2 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex A.

3 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

3.1 General Conditions

2010B (2018-06-21), General conditions: Professional services (medium complexity) apply to and form part of the Contract.

3.2 Supplemental General Conditions

4006 (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

4 Term of Contract

4.1 Period of the Contract

This period of the contract is from date of contract award to 31 Jan 2020

The work must be completed by 30 Nov 2019.

5 Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Holly Brousseau

Title: Senior Procurement Officer, D Svcs C 4-2-5

Organization: Department of National Defence, Director Services Contracting 4 (D Svcs C 4)

Address: National Defence Headquarters

Attention: D Svcs C 4-2-5

101 Colonel By Drive

Ottawa, ON

K1A 0Z4

Telephone: 819-939-8480

E-mail address: holly.brousseau@forces.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

s.19(1)

Contract No. W6369-19-X033/A

5.2 Technical Authority

The Technical Authority for the Contract is:

Name: LCol Doug Allison
Title: DG Military Strategic Communications FD
Organization: Department of National Defence and Canadian Armed Forces
Address: National Defence Headquarters
101 Colonel By Drive
Ottawa, ON
K1A 0Z4

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

5.3 Contractor's Representative

Name: Gaby van den Berg
Title: Director
Organization: Emic Consulting Ltd.
Address:

6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) (<http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html>) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada (http://www.tbs-sct.gc.ca/pubs_pol/dcpubs/contpolnotices/siglist-eng.asp).

7 Payment

7.1 Basis of Payment

For the Work described in Annex A, Statement of Work:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price, for a cost of \$615,285.00. Customs duties are excluded and Applicable Taxes are extra.

For the firm price portion of the Work only, Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

Contract No. W6369-19-X033/A

7.2 Limitation of Price

SACC Manual clause C6000C (2017-08-17), Limitation of Price

7.3 Milestone Payments

H3010C (2016-01-28), Milestone Payments - Not subject to holdback

H4012C (2010-01-11), Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No	Description of Deliverable	Firm Amount	Delivery Date
1	To include all aspects of course planning and preparation activities	20% of firm lot price, period of the contract.	Within the 1st month of the contract (upon receipt of applicable invoice).
2	After administration of the first exam.	40% of firm lot price, period of the contract.	Upon completion of 1 st half of course (upon receipt of invoice).
3	After completion of all contract activities.	40% of firm lot price, period of the contract.	Upon completion of 2 nd half of course (upon receipt of invoice).

7.4 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. () VISA Acquisition Card;
- b. () MasterCard Acquisition Card;
- c. () Direct Deposit (Domestic and International);
- d. () Electronic Data Interchange (EDI);
- e. (X) Wire Transfer (International Only);

Contract No. W6369-19-X033/A

8 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the General Conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of the release document and any other documents as specified in the Contract; and
- b. a copy of the invoices, receipts, vouchers for all direct expenses

Invoices must be distributed as follows:

- a. The original must be forwarded to the Technical Authority address shown on page 4 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

9 Certifications and Additional Information

9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario

11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) supplemental general conditions 4006 (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) general conditions 2010B (2018-08-16), General conditions: Professional Services (medium complexity);
- (c) Annex A, Statement of Work
- (d) Annex B, Basis of Payment
- (e) Annex C, Non-Disclosure Agreement;
- (f) the Contractor's bid dated 17 June 2019

Contract No. W6369-19-X033/A

12 **SACC Manual Clauses**

G1005C (2016-01-28), Insurance - No Specific Requirement
A9062C (2010-01-11), Government Site Regulations
A9117C (2007-11-30), T1204 - Direct Request by Customer Department
A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)

Contract No. W6369-19-X033/A

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS) direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified Target Audience Analysis (TAA) as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.2. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAA methodology. By retaining usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a tailored course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) The course must be completed by 30 Nov 2019;
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study, which will pertain to CAF/DND issues, will be provided to the Contractor after contract award. The resulting findings must be practically applicable to CAF/DND;
 - ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
 - (g) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;

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- (h) Course material must be current and reflect any recent developments in Target Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must provide the following tasks and deliverables:

- 6.1. Design and conduct a Target Audience Analysis course which ends no later than 30 Nov 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis.
- 6.2. Arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), excluding those already provided by the place of instruction (ie-electronic projectors and flip charts).
- 6.3. Provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students which DND will keep.
- 6.4. Design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points.
- 6.5. Develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research.
- 6.6. Refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training.
- 6.7. Design, conduct and assess written examinations, individual and syndicate presentations.
- 6.8. Provide course certificates of completion to each student at the end of the course.

7. REPORTING REQUIREMENTS

- 7.1. A progress report must be completed by the Contractor for each student and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;
 - (c) Any training concerns regarding student performance;
 - (d) Any student concerns regarding course material or delivery;
 - (e) Description of any problems encountered which will require attention or escalation; and
 - (f) Any recommendations to update or change the course schedule.

Contract No. W6369-19-X033/A

7.2. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

8. LANGUAGE REQUIREMENTS

8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

9. LOCATION OF WORK

9.1. All instruction must be completed at DND facilities within the National Capital Region (NCR).

10. TRAVEL

10.1 There is no travel associated with this Contract. Travel within the NCR will not be reimbursed.

s.20(1)(b)

s.20(1)(c)

Contract No. W6369-19-X033/A

ANNEX B – BASIS OF PAYMENT

1. Contract Period From Contract Award to 31 Jan 2020

A. During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1.1 Schedule of Milestones

A. The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description of Deliverable	Firm Amount
1	Course planning and preparation activities.	
2	After administration of the first exam.	
3	After completion of all contract activities.	
Contract Total		\$615,285.00 CAD

NOTE: The above milestones are inclusive of overhead costs including general and administrative expenses and travel and living expenses for all contracted resources and instructors.

Contract No. W6369-19-X033/A

ANNEX C - NON-DISCLOSURE AGREEMENT

(This annex is to be completed after contract award and is not required in the bid.)

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. W6369-19-X033/A between Her Majesty the Queen in right of Canada, represented by the Department of National Defence and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: W6369-19-X033/A

Signature

Date

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January 22, 2020 9:56 AM
To: Sanchez LCdr N@C Navy DNIW@Ottawa-Hull
Subject: RE: Target Audience Analysis Course

Good morning Nathalie,

We will run another course here in the fall, and there is no cost to candidates to attend the course. Sending units are responsible for bearing any TD costs incurred if a candidate is from outside the NCR.

The serial went very well, with all candidates remarking that it was either the best or one of the best courses they had ever attended.

MTF when we have info.

From: Sanchez LCdr N@C Navy DNIW@Ottawa-Hull
Sent: January-22-20 9:34 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: Target Audience Analysis Course

Good morning, Sir:

I have been away on TD this past quarter. Now back at Carling Campus. I remember we discussed subject course before I left for INDOPACOM. Wondering how the first serial went and whether this course will be offered yearly moving forward. It's budget season and I'm very interested in attending, but wanted to make inquiries about whether it will actually run. Folks here indicate that it was only a trial.

Very respectfully,

LCdr/Capc Natalie Sanchez, CD

DNIW 2-6 Senior Staff Officer - Targeting
Canadian Armed Forces
natalie.sanchez@forces.gc.ca; phone : 613-904-6956; CSN: 904-6956

DNIW 2-6 Officier supérieur d'état-major - Ciblage
Forces Armées Canadiennes
natalie.sanchez@forces.gc.ca ; telephone : 613-904-6956; CSN: 904-6956

From: [DeRito J@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:DeRito.J@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: January 23, 2020 10:49 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: W6369-19-X033/A - contract close

☺ Super.

Thank you.

Johanne.

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January 20, 2020 2:37 PM
To: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Johanne,

No need. I managed to find a copy.

thx

From: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: January-17-20 12:26 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good afternoon,

I am out of the office; I will forward a copy of Contract W6369-19-X033/A to your attention upon my return on Thursday January 23, 2020.

Best regards,

Johanne De Rito

Agente supérieur d'approvisionnement, Direction des contrats de service (DC Svc 4-2-2)
Ministère de la Défense nationale / Gouvernement du Canada
Johanne.DeRito@forces.gc.ca / Tél : (819) 939-8451

Senior Procurement Officer, Directorate of Services Contracting (D Svcs C 4-2-2)
Department of National Defence / Government of Canada
Johanne.DeRito@forces.gc.ca / Tel: (819) 939-8451

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January 17, 2020 12:08 PM
To: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: FW: W6369-19-X033/A - contract close

Received an e-mail from Sharon Sally that queries could be sent to this address. Can you help with the request below please?

Thanks

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-17-20 12:03 PM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Hi Sharon,

We are starting to receive invoices for this but I don't have a copy of the original contract. Is it possible that you could forward it to me.

Thanks

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-24-19 7:56 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: FW: W6369-19-X033/A - contract close

Good morning Lieutenant Colonel Allison,

You had confirmed that no contract extension or follow-on contract is required. However, if the situation changes, you can contact Johanne De Rito (CC'd). As I mentioned in a previous email, I'll be leaving the DND at the beginning of January. Have a wonderful holiday season.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 18, 2019 10:07 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good morning Sir,

I was on leave yesterday. We can close the file. There is no problem. I wanted to ensure the Target Audience Analysis (X033/A) was on track to close at the end of January without an extension and that a subsequent (follow-on) contract was not required. I called earlier, but you were not available. If anything at all is required, don't hesitate to contact me.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: December 17, 2019 6:19 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Sharon

We continue to await the arrival of receipts from the contractor. The course has been delivered and we are satisfied that all conditions in the contract have been met.

Is there something I am missing on this? Any interim or scheduled payments are authorized. Do we have to initiate that process?
Could you please give me a call this morning to discuss. I should be aval after 1000.

Sorry for any misunderstanding. I would like to close this as well.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull

Sent: Monday, December 16, 2019 2:27 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison,

I am contacting you with regarding the W6369-19-X033/A Target Audience Training contract. As the end date is fast approaching (January 31st, 2020), please let us know if a follow-on contract and/or contract extension is required. I will be leaving the DND as of January 3rd, however, you may contact Johanne De Rito (CC'd) for assistance following this date. Thank you véry much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 5, 2019 12:34 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison.

Contract W6369-19-X033/A ends 31 Jan 2020. I just wanted to check and make sure that everything is on track for ending the contract at the end of January. Please confirm and let me know if an extension is required. Thanks very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs C
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

s.19(1)

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October 25, 2019 10:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Thank you very much Lieutenant Colonel Allison. I'll let her know.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: October 25, 2019 9:48 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>; Kapp R
(Contractor)@ADM(PA) DGPASP@Ottawa-Hull <ROSANGELA.KAPP@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Hi Sharon, sorry I did not get back to you sooner.

I believe that we will need copies of all of the invoices for auditing purposes, so will have to submit them.

The invoices should be paid in Cdn funds

Rosangela Kapp, cc'ed here, can help with the payment issue.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-22-19 4:41 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Good afternoon Lieutenant Colonel Allison,

the Contractor's Representative for contract W6369-19-X033/A has a couple of questions regarding the submission of invoices.

- 1) She mentions that, as stated in the contract, each invoice must be supported by "a copy of the invoices, receipts, vouchers for all direct expenses". She noted that she has many, many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. She'd like to know if they all have to be sent.
- 2) She would like to know if the invoice should list the total payable in Euros or in Canadian Funds.

If you like, you could provide me with the contact information for the person paying the invoices and I will sort this out with him or her. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 26, 2019 2:02 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: RE: W6369-19-X033/A - TAA

Holly,

Thank you so much for all of your assistance on this file. I couldn't have done it without your tremendous support.

Best of luck with your next endeavours.

Sharon,

Welcome aboard

Cheers.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-26-19 1:58 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: W6369-19-X033/A - TAA

Hello LCol Allison,

I just want to inform you that I will be leaving DND at the end of this week. I have just handed over this contract to my colleague, Sharon Sally. Moving forward, if you have any questions or concerns about this file, please contact Sharon.

It has been wonderful to work with you.

Kind Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Ahmad A@ADM(PA) DPAPI@Ottawa-Hull

From: Allison LCol DE@ADM(PA) DPAPPO@Ottawa-Hull
Sent: February 12, 2020 11:01 AM
To:
Subject: RE: Invoices

I have read the final report and am happy with the conclusions and recommendations. It can stand on its own without any amendments.

Rosangela Kapp will reach out to you on the invoice/payments questions.

Thanks

From:
Sent: February-12-20 10:57 AM
To: Allison LCol DE@ADM(PA) DPAPPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: Re: Invoices

Dear LCol Allison,

Thank you for your email. I have sent a first invoice a while back, and received another few forms to fill out that contain some fields I do not have the information for (for example I do not have a DOA record number) so I hope April has what she needs now to process my invoice. The others are ready to go - just waiting for April to confirm.

Have you had a chance to look at the final report we sent out and if so, are you happy with it or are there any things you would like for us to change / add?

With kind regards,

www.emicconsulting.co.uk

emic Consulting

On 10 Feb 2020, at 16:58, DOUGLAS.ALLISON@forces.gc.ca wrote:

Hi

Hope this e-mail finds you well. Just as a reminder, we are looking to get our annual financial allocation committed or expended by 1 Mar. Accordingly, if you could send us the invoices for payment it would be most appreciated.

Thanks

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : [613-944-3291](tel:613-944-3291) / Cel/Tel. Cell : [613-219-2361](tel:613-219-2361) / CSN/RCCC : [944-3291](tel:944-3291)

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 19, 2020 2:34 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM\(Mat\).D Svcs C@Ottawa-Hull](mailto:+D_Svcs_C_4_Procurement_-_DC_Svcs_4_Aquisitions@ADM(Mat).D_Svcs_C@Ottawa-Hull)
Subject: W6369-19-X033/A - Second iteration

Dear sir/madam,

I am looking to start the process to run a second serial of the course in subj line. My last point of contact for this was Sharon Sally, who left your group in January. Sharon advised that I contact Johanne De Rito in the interim. Is she the best contact to issue an RFP, or should I be contacting someone else? Your assistance is appreciated.

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 20, 2020 2:58 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull); [DeRito J@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:DeRito.J@ADM(Mat).D.Svcs.C@Ottawa-Hull); [+D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull); [Abboud L@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Abboud.L@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Re: W6369-19-X033/A - contract close

Anna,

Super feedback and thanks for this. Wilco.

What does task authorization contract entail?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, April 20, 2020 2:50 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull; +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; Abboud L@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: RE: W6369-19-X033/A - contract close

Good afternoon LCol Allison,

Please find attached the PRAT. The previous contract didn't include a security requirement, therefore an SRCL isn't required for the follow on contract (unless that situation has changed, please advise and I'll send the SRCL template).

In addition to the docs Johanne mentioned below, you'll also need to provide an updated evaluation criteria. You can use the evaluation criteria at Attachment 1 to Part 4 of the attached RFP as your starting point.

I've assigned your requirement the following file number: W6369-21-X008.

Johanne – please add this requirement to the file tracker. I also noticed that the RFP used SACC 2010B (medium complexity) and SACC 4007 – Canada to Own Intellectual Property Rights in Foreground Information. Technically, if we want to use 4007 again for this new contract, we need to use SACC 2035 – General Conditions – Higher Complexity – Services. The docs for 19-X033/A are saved in RDIMS (except the contract).

I also suggest that :

- the follow on contract include option periods so that we're not re-soliciting for this requirement every year. Please confirm how many option periods are required (they can be listed as unfunded in the EIR but the initial contract period must be funded);
- make this new contract a Task Authorization (TA) contract; and
- confirm how many courses per year are required.

Thanks,

Anna Maria Mangone

Spécialiste en approvisionnement, DC Svcs 4-3

Ministère de la Défense nationale / Gouvernement du Canada

Anna-Maria.Mangone@forces.gc.ca / Tél. : 819-939-8485 / RCCC : 997-3316 / ATS : 1-800-467-9877

Procurement Specialist, D Svcs C 4-3

Department of National Defence / Government of Canada

Anna-Maria.Mangone@forces.gc.ca / Tel: 819-939-8485 / CSN: 997-3316 / TTY: 1-800-467-9877

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

Sent: April 20, 2020 1:59 PM

To: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>; +D Svcs C 4

Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-

OTG.DSvcsC4Proc@intern.mil.ca>

Subject: Re: W6369-19-X033/A - contract close

Johanne, Thx for your reply.

I have an updated SOW and will have a signed EIR soon as well. Can you forward a copy of an SRCL and PRAT.

Appreciate your help

Sent from my BlackBerry 10 smartphone on the Bell network.

From: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull

Sent: Monday, April 20, 2020 12:26 PM

To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

Subject: RE: W6369-19-X033/A - contract close

Good afternoon Sir,

Thank you for your email; all is good with my family. Hope that you and your loved ones are also safe and in good spirits.

The above mentioned contract expired, therefore we must proceed with a new requirement.

The documentation must be submitted to our positional mailbox (+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull) to be tracked and assigned to a Procurement Officer.

Please note that to proceed we will require the following:

A signed Expenditure Initiation requires (EIR) form that indicates the approved funding – the amount must be included on the EIR.

SRCL

SOW

Procurement Risk Assessment Tool (PRAT)

Best regards,

Johanne De Rito

Agente supérieur d'approvisionnement, Direction - Contrats de services, D Svcs C 4-2-2

Ministère de la Défense nationale | Gouvernement du Canada

Johanne.DeRito@forces.gc.ca | Tél: 819.939-8451

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-2

Department of National Defence | Government of Canada

Johanne.DeRito@forces.gc.ca | Tel: (819) 939-8451

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 19, 2020 2:28 PM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Hi Johanne,

Hope this e-mail finds you and your family well.

I am in the process of updating the SOW for a second iteration of this course. Are you the correct person to contact in order to get the process started?

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
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Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-24-19 7:56 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: FW: W6369-19-X033/A - contract close

Good morning Lieutenant Colonel Allison,

You had confirmed that no contract extension or follow-on contract is required. However, if the situation changes, you can contact Johanne De Rito (CC'd). As I mentioned in a previous email, I'll be leaving the DND at the beginning of January. Have a wonderful holiday season.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 18, 2019 10:07 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good morning Sir,

I was on leave yesterday. We can close the file. There is no problem. I wanted to ensure the Target Audience Analysis (X033/A) was on track to close at the end of January without an extension and that a subsequent (follow-on) contract was not required. I called earlier, but you were not available. If anything at all is required, don't hesitate to contact me.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

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Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December 17, 2019 6:19 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Sharon

We continue to await the arrival of receipts from the contractor. The course has been delivered and we are satisfied that all conditions in the contract have been met.

Is there something I am missing on this? Any interim or scheduled payments are authorized. Do we have to initiate that process?
Could you please give me a call this morning to discuss. I should be available after 1000.

Sorry for any misunderstanding. I would like to close this as well.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, December 16, 2019 2:27 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison,

I am contacting you with regarding the W6369-19-X033/A Target Audience Training contract. As the end date is fast approaching (January 31st, 2020), please let us know if a follow-on contract and/or contract extension is required. I will be leaving the DND as of January 3rd, however, you may contact Johanne De Rito (CC'd) for assistance following this date. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
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sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 5, 2019 12:34 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison.

Contract W6369-19-X033/A ends 31 Jan 2020. I just wanted to check and make sure that everything is on track for ending the contract at the end of January. Please confirm and let me know if an extension is required. Thanks very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs C
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sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October 25, 2019 10:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

s.19(1)

Thank you very much Lieutenant Colonel Allison. I'll let her know.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: October 25, 2019 9:48 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>; Kapp R
(Contractor)@ADM(PA) DGPASP@Ottawa-Hull <ROSANGELA.KAPP@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Hi Sharon, sorry I did not get back to you sooner.

I believe that we will need copies of all of the invoices for auditing purposes, so will have to submit them.

The invoices should be paid in Cdn funds

Rosangela Kapp, cc'ed here, can help with the payment issue.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-22-19 4:41 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Good afternoon Lieutenant Colonel Allison,

the Contractor's Representative for contract W6369-19-X033/A has a couple of questions regarding the submission of invoices.

- 1) She mentions that, as stated in the contract, each invoice must be supported by "a copy of the invoices, receipts, vouchers for all direct expenses". She noted that she has many, many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. She'd like to know if they all have to be sent.
- 2) She would like to know if the invoice should list the total payable in Euros or in Canadian Funds.

If you like, you could provide me with the contact information for the person paying the invoices and I will sort this out with him or her. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 26, 2019 2:02 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: RE: W6369-19-X033/A - TAA

Holly,

Thank you so much for all of your assistance on this file. I couldn't have done it without your tremendous support.

Best of luck with your next endeavours.

Sharon,

Welcome aboard

Cheers.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-26-19 1:58 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: W6369-19-X033/A - TAA

Hello LCol Allison,

I just want to inform you that I will be leaving DND at the end of this week. I have just handed over this contract to my colleague, Sharon Sally. Moving forward, if you have any questions or concerns about this file, please contact Sharon.

It has been wonderful to work with you.

Kind Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 20, 2020 4:23 PM
To: [Phillips KA@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Phillips.KA@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Fw: W6369-19-X033/A - contract close
Attachments: TA(DND626).pdf

Kris, will this help fin shyte?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Sent: Monday, April 20, 2020 3:20 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull; +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; Abboud L@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: RE: W6369-19-X033/A - contract close

A task authorization (TA) contract is for “as-and-when-requested work”; so each time you need to conduct a course, we’d raise a DND626 (what DND calls a task authorization – see attached form). This allows for greater tracking of spending and for flexibility if there are funding uncertainties. Also used for contracts that don’t have a full time level of effort (LOE). As well, the contractor can’t start the work until a signed DND626 has been issued.

There won’t be a big difference from the previous contract except that we’ll need to issue a DND626 each time a course is required.

Further info can be found here: <http://materiel.mil.ca/en/business-functions-procurement-contracting/pam-3-3-2.page> and <http://materiel.mil.ca/en/business-functions-procurement-contracting/pam-3-3-11.page#pam-3.3.11.h>

Thanks,

Anna Maria Mangone

Spécialiste en approvisionnement, DC Svcs 4-3
Ministère de la Défense nationale / Gouvernement du Canada
Anna-Maria.Mangone@forces.gc.ca / Tél. : 819-939-8485 / RCCC : 997-3316 / ATS : 1-800-467-9877

Procurement Specialist, D Svcs C 4-3
Department of National Defence / Government of Canada
Anna-Maria.Mangone@forces.gc.ca / Tel: 819-939-8485 / CSN: 997-3316 / TTY: 1-800-467-9877

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 20, 2020 2:58 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>; +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Abboud L@ADM(Mat) D Svcs C@Ottawa-Hull <LINDA.ABBOUD@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Anna,

Super feedback and thanks for this. Wilco.

What does task authorization contract entail?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, April 20, 2020 2:50 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull;
+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; Abboud
L@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: RE: W6369-19-X033/A - contract close

Good afternoon LCol Allison,

Please find attached the PRAT. The previous contract didn't include a security requirement, therefore an SRCL isn't required for the follow on contract (unless that situation has changed, please advise and I'll send the SRCL template).

In addition to the docs Johanne mentioned below, you'll also need to provide an updated evaluation criteria. You can use the evaluation criteria at Attachment 1 to Part 4 of the attached RFP as your starting point.

I've assigned your requirement the following file number: W6369-21-X008.

Johanne – please add this requirement to the file tracker. I also noticed that the RFP used SACC 2010B (medium complexity) and SACC 4007 – Canada to Own Intellectual Property Rights in Foreground Information. Technically, if we want to use 4007 again for this new contract, we need to use SACC 2035 – General Conditions – Higher Complexity – Services. The docs for 19-X033/A are saved in RDIMS (except the contract).

I also suggest that :

- the follow on contract include option periods so that we're not re-soliciting for this requirement every year. Please confirm how many option periods are required (they can be listed as unfunded in the EIR but the initial contract period must be funded);
- make this new contract a Task Authorization (TA) contract; and
- confirm how many courses per year are required.

Thanks,

Anna Maria Mangone

Spécialiste en approvisionnement, DC Svcs 4-3
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Anna-Maria.Mangone@forces.gc.ca / Tel: 819-939-8485 / CSN: 997-3316 / TTY: 1-800-467-9877

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 20, 2020 1:59 PM
To: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>; +D Svcs C 4
Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-

OTG.DSvcsC4Proc@intern.mil.ca>

Subject: Re: W6369-19-X033/A - contract close

Johanne, Thx for your reply.

I have an updated SOW and will have a signed EIR soon as well. Can you forward a copy of an SRCL and PRAT.

Appreciate your help

Sent from my BlackBerry 10 smartphone on the Bell network.

From: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, April 20, 2020 12:26 PM
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Good afternoon Sir,

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The documentation must be submitted to our positional mailbox (+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull) to be tracked and assigned to a Procurement Officer.

Please note that to proceed we will require the following:

A signed Expenditure Initiation requires (EIR) form that indicates the approved funding – the amount must be included on the EIR.

SRCL

SOW

Procurement Risk Assessment Tool (PRAT)

Best regards,

Johanne De Rito

Agente supérieur d'approvisionnement, Direction - Contrats de services, D Svcs C 4-2-2
Ministère de la Défense nationale | Gouvernement du Canada
Johanne.DeRito@forces.gc.ca | Tél: 819.939-8451

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-2
Department of National Defence | Government of Canada
Johanne.DeRito@forces.gc.ca | Tel: (819) 939-8451

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 19, 2020 2:28 PM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Hi Johanne,

Hope this e-mail finds you and your family well.

I am in the process of updating the SOW for a second iteration of this course. Are you the correct person to contact in order to get the process started?

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-24-19 7:56 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: FW: W6369-19-X033/A - contract close

Good morning Lieutenant Colonel Allison,

You had confirmed that no contract extension or follow-on contract is required. However, if the situation changes, you can contact Johanne De Rito (CC'd). As I mentioned in a previous email, I'll be leaving the DND at the beginning of January. Have a wonderful holiday season.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 18, 2019 10:07 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good morning Sir,

I was on leave yesterday. We can close the file. There is no problem. I wanted to ensure the Target Audience Analysis (X033/A) was on track to close at the end of January without an extension and that a subsequent (follow-on) contract was not required. I called earlier, but you were not available. If anything at all is required, don't hesitate to contact me.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs 4-2-2-2
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December 17, 2019 6:19 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Sharon

We continue to await the arrival of receipts from the contractor. The course has been delivered and we are satisfied that all conditions in the contract have been met.

Is there something I am missing on this? Any interim or scheduled payments are authorized. Do we have to initiate that process?
Could you please give me a call this morning to discuss. I should be aval after 1000.

Sorry for any misunderstanding. I would like to close this as well.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, December 16, 2019 2:27 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison,

I am contacting you with regarding the W6369-19-X033/A Target Audience Training contract. As the end date is fast approaching (January 31st, 2020), please let us know if a follow-on contract and/or contract extension is required. I will be leaving the DND as of January 3rd, however, you may contact Johanne De Rito (CC'd) for assistance following this date. Thank you very much.

Best regards,

Sharon

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Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C 4-2-2-2
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 5, 2019 12:34 PM
To: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison.

Contract W6369-19-X033/A ends 31 Jan 2020. I just wanted to check and make sure that everything is on track for ending the contract at the end of January. Please confirm and let me know if an extension is required. Thanks very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs C
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October 25, 2019 10:00 AM
To: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Thank you very much Lieutenant Colonel Allison. I'll let her know.

Best regards,

Sharon

s.19(1)

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: October 25, 2019 9:48 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>; Kapp R
(Contractor)@ADM(PA) DGPASP@Ottawa-Hull <ROSANGELA.KAPP@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Hi Sharon, sorry I did not get back to you sooner.

I believe that we will need copies of all of the invoices for auditing purposes, so I will have to submit them.

The invoices should be paid in Cdn funds

Rosangela Kapp, cc'ed here, can help with the payment issue.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-22-19 4:41 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Good afternoon Lieutenant Colonel Allison,

the Contractor's Representative for contract W6369-19-X033/A has a couple of questions regarding the submission of invoices.

- 1) She mentions that, as stated in the contract, each invoice must be supported by "a copy of the invoices, receipts, vouchers for all direct expenses". She noted that she has many, many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. She'd like to know if they all have to be sent.
- 2) She would like to know if the invoice should list the total payable in Euros or in Canadian Funds.

If you like, you could provide me with the contact information for the person paying the invoices and I will sort this out with him or her. Thank you very much.

Best regards,

Sharon

Agente d'approvisionnement, Direction des contrats de service – DC Svcs
Ministère de la Défense nationale / Gouvernement du Canada
sharon.sally@forces.gc.ca / Tél : 819-939-8990

A0447872_7-001298

Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 26, 2019 2:02 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: RE: W6369-19-X033/A - TAA

Holly,

Thank you so much for all of your assistance on this file. I couldn't have done it without your tremendous support.

Best of luck with your next endeavours.

Sharon,

Welcome aboard

Cheers.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-26-19 1:58 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: W6369-19-X033/A - TAA

Hello LCol Allison,

I just want to inform you that I will be leaving DND at the end of this week. I have just handed over this contract to my colleague, Sharon Sally. Moving forward, if you have any questions or concerns about this file, please contact Sharon.

It has been wonderful to work with you.

Kind Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada

Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

**TASK AUTHORIZATION
 AUTORISATION DES TÂCHES**

All invoices/progress claims must show the reference Contract and Task numbers. Toutes les factures doivent indiquer les numéros du contrat et de la tâche.		Contract no. – N° du contrat <hr/> Task no. – N° de la tâche
Amendment no. – N° de la modification	Increase/Decrease – Augmentation/Réduction	Previous value – Valeur précédente
To – À	<p>TO THE CONTRACTOR</p> <p>You are requested to supply the following services in accordance with the terms of the above reference contract. Only services included in the contract shall be supplied against this task.</p> <p>Please advise the undersigned if the completion date cannot be met. Invoices/progress claims shall be prepared in accordance with the instructions set out in the contract.</p> <p>À L'ENTREPRENEUR</p> <p>Vous êtes prié de fournir les services suivants en conformité des termes du contrat mentionné ci-dessus. Seuls les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande.</p> <p>Prière d'aviser le signataire si la livraison ne peut se faire dans les délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat.</p>	
Delivery location – Expédiez à	Date _____ for the Department of National Defence pour le ministère de la Défense nationale	
Delivery/Completion date – Date de livraison/d'achèvement		
Contract item no. N° d'article du contrat	Services	Cost Prix
	GST/HST TPS/TVH	
	Total	
<p>APPLICABLE ONLY TO PWGSC CONTRACTS: The Contract Authority signature is required when the total value of the DND 626 exceeds the threshold specified in the contract.</p> <p>NE S'APPLIQUE QU'AUX CONTRATS DE TPSGC : La signature de l'autorité contractante est requise lorsque la valeur totale du formulaire DND 626 est supérieure au seuil précisé dans le contrat.</p>		
_____ for the Department of Public Works and Government Services pour le ministère des Travaux publics et services gouvernementaux		

Instructions for completing DND 626 - Task Authorization

Contract no.

Enter the PWGSC contract number in full.

Task no.

Enter the sequential Task number.

Amendment no.

Enter the amendment number when the original Task is amended to change the scope or the value.

Increase/Decrease

Enter the increase or decrease total dollar amount including taxes.

Previous value

Enter the previous total dollar amount including taxes.

To

Name of the contractor.

Delivery location

Location where the work will be completed, if other than the contractor's location.

Delivery/Completion date

Completion date for the task.

for the Department of National Defence

Signature of the DND person who has delegated Authority for signing DND 626 (level of authority based on the dollar value of the task and the equivalent signing authority in the PAM 1.4). **Note:** the person signing in this block ensures that the work is within the scope of the contract, that sufficient funds remain in the contract to cover this task and that the task is affordable within the Project/Unit budget.

Services

Define the requirement briefly (attach the SOW) and identify the cost of the task using the contractor's quote on the level of effort. The Task must use the basis of payment stipulated in the contract. If there are several basis of payment then list here the one(s) that will apply to the task quote (e.g. milestone payments; per diem rates/labour category hourly rates; travel and living rates; firm price/ceiling price, etc.). All the terms and conditions of the contract apply to this Task Authorization and cannot be ignored or amended for this task. Therefore it is not necessary to restate these general contract terms and conditions on the DND 626 Task form.

Cost

The cost of the Task broken out into the individual costed items in **Services**.

GST/HST

The GST/HST cost as appropriate.

Total

The total cost of the task. The contractor may not exceed this amount without the approval of DND indicated on an amended DND 626. The amendment value may not exceed 50% (or the percentage for amendments established in the contract) of the original value of the task authorization. The total cost of a DND 626, including all amendments, may not exceed the funding limit identified in the contract.

Applicable only to PWGSC contracts

This block only applies to those Task Authorization contracts awarded by PWGSC. The contract will include a specified threshold for DND sole approval of the DND 626 and a percentage for DND to approve amendments to the original DND 626. Tasks that will exceed these thresholds must be passed to the PWGSC Contracting Authority for review and signature prior to authorizing the contractor to begin work.

Note:

Work on the task may not commence prior to the date this form is signed by the DA Authority - for tasks within the DND threshold; and by both DND and PWGSC for those tasks over the DND threshold.

Instructions pour compléter le formulaire DND 626 - Autorisation des tâches

N° du contrat

Inscrivez le numéro du contrat de TPSGC en entier.

N° de la tâche

Inscrivez le numéro de tâche séquentiel.

N° de la modification

Inscrivez le numéro de modification lorsque la tâche originale est modifiée pour en changer la portée.

Augmentation/Réduction

Inscrivez le montant total de l'augmentation ou de la diminution, y compris les taxes.

Valeur précédente

Inscrivez le montant total précédent, y compris les taxes.

À

Nom de l'entrepreneur.

Expédiez à

Endroit où le travail sera effectué, si celui-ci diffère du lieu d'affaires de l'entrepreneur.

Date de livraison/d'achèvement

Date d'achèvement de la tâche.

pour le ministère de la Défense nationale

Signature du représentant du MDN auquel on a délégué le pouvoir d'approbation en ce qui a trait à la signature du formulaire DND 626 (niveau d'autorité basé sur la valeur de la tâche et le signataire autorisé équivalent mentionné dans le MAA 1.4). **Nota :** la personne qui signe cette attache de signature confirme que les travaux respectent la portée du contrat, que suffisamment de fonds sont prévus au contrat pour couvrir cette tâche et que le budget alloué à l'unité ou pour le projet le permet.

Services

Définissez brièvement le besoin (joignez l'ET) et établissez le coût de la tâche à l'aide de la soumission de l'entrepreneur selon le niveau de difficulté de celle-ci. Les modalités de paiement stipulées dans le contrat s'appliquent à la tâche. Si plusieurs d'entre elles sont prévues, énumérez ici celle/celles qui s'appliquera/ront à la soumission pour la tâche à accomplir (p.ex. acompte fondé sur les étapes franchies; taux quotidien ou taux horaire établi selon la catégorie de main-d'œuvre; frais de déplacement et de séjour; prix fixe ou prix plafond; etc.). Toutes les modalités du contrat s'appliquent à cette autorisation de tâche et ne peuvent être négligées ou modifiées quant à la tâche en question. Il n'est donc pas nécessaire de répéter ces modalités générales afférentes au contrat sur le formulaire DND 626.

Prix

Mentionnez le coût de la tâche en le répartissant selon les frais afférents à chaque item mentionné dans la rubrique **Services**.

TPS/TVH

Mentionnez le montant de la TPS/TVH, s'il y a lieu.

Total

Mentionnez le coût total de la tâche. L'entrepreneur ne peut dépasser ce montant sans l'approbation du MDN, formulaire DND 626 modifié à l'appui. Le coût de la modification ne peut pas être supérieur à 50 p. 100 du montant initial prévu dans l'autorisation de tâche (ou au pourcentage prévu dans le contrat pour les modifications). Le coût total spécifié dans le formulaire DND 626, y compris toutes les modifications, ne peut dépasser le plafond de financement mentionné dans le contrat.

Ne s'applique qu'aux contrats de TPSGC

Le présent paragraphe s'applique uniquement aux autorisations de tâche accordées par TPSGC. On inscrira dans le formulaire DND 626 un plafond précis qui ne pourra être approuvé que par le MDN et un pourcentage selon lequel le MDN pourra approuver des modifications au formulaire DND 626 original. Les tâches dont le coût dépasse ces plafonds doivent être soumises à l'autorité contractante de TPSGC pour examen et signature avant qu'on autorise l'entrepreneur à débiter les travaux.

Nota :

Les travaux ne peuvent commencer avant la date de signature de ce formulaire par le responsable du MDN, pour les tâches dont le coût est inférieur au plafond établi par le MDN, et par le MDN et TPSGC pour les tâches dont le coût dépasse le plafond établi par le MDN.

s.19(1)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 21, 2020 8:02 AM
To: [Kris Phillips](mailto:Kris.Phillips)
Subject: Fw: EIR AAA
Attachments: EIR AAA 20-21.xlsx

Kris,

Can you confirm/update fin code in attachment and return to me. Thx

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Doug Allison <
Sent: Tuesday, April 21, 2020 8:00 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: EIR AAA

Sent from [Mail](#) for Windows 10

EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE:										
ORIGINAL		MODIFICATION & NO.			DATE (15 April 2019)					
1) Project Manager (PM) or Technical Authority (TA)										
Name:		Doug Allison								
Title:		ADM(PA) DGMSC FD								
Designation:										
Organization:		ADM (PA)								
Address:		NDHQ Carling, 60 Moodie Dr. Pavilion Bldg								
Telephone Number:		613-901-4697								
Facsimile: (optional)										
Email:		Douglas.Allison@forces.gc.ca								
2) Requirement - MANDATORY										
<p>Summary of the Requirement: Requirement Analysis (RA) is a required capacity to support Joint Targeting, Information Operations and Strategic Communication. Strategic Communication and Information Operations are SSE-related initiatives which have CDS initiating directives for implementation. ADM (PA) plans to provide an AAA capability that will support these initiatives in FY 2021. This will require the additional training of CAF and DND personnel on a suitable AAA methodology, a training methodology which does not currently exist in the CAF nor DND. There are no suitable foreign military options which could deliver in time. It is therefore necessary to engage an entity to provide training on a methodology suitable for the CAF's needs.</p> <p>Basis of Payment:</p>										
<input type="checkbox"/> Recurring Requirement										
3) Description of Goods and/or Services										
<input checked="" type="checkbox"/> List of Deliverables, Statement of Work/Requirement or Quote is attached										
<input type="checkbox"/> Line Item Details attached										
<input type="checkbox"/> Hazardous Material										
<input type="checkbox"/> Controlled Goods										
<input type="checkbox"/> Quality Assurance (QA)										
<input type="checkbox"/> Technical Data Package (TDP)										
4) Technical Evaluation - MANDATORY except for Sole Source Requirements. Select one of the following:										
Selection Methodology - Select one of the following										
<input checked="" type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on <i>Mandatory</i> criteria only)										
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on a combination of <i>Mandatory</i> and <i>Point-Rated</i> criteria)										
<input type="checkbox"/> Lowest Responsive <i>Cost-per-Point</i> Proposal										
<input type="checkbox"/> Highest Responsive Combined Rating of <i>Technical Merit and Price</i> (e.g. 60/40 or 70/30)										
<input type="checkbox"/> Highest-Rated Responsive Proposal within a Specified <i>Maximum Budget</i>										
<input type="checkbox"/> See attached <i>Mandatory Technical Evaluation Criteria</i> (for simple goods or services)										
<input type="checkbox"/> See attached <i>Evaluation Plan</i> (for complex goods or services)										
5) Security Requirements - MANDATORY										
<input checked="" type="checkbox"/> Completed Security Requirements Check List (SRCL) form attached										
6) Procurement Strategy Considerations - MANDATORY (select one)										
<input checked="" type="checkbox"/> Competitive Requirement										
<input type="checkbox"/> Sole Source Requirement										
<input type="checkbox"/> Sole Source Requirement and exception 6 (d) of the GCRs applies.										
<input type="checkbox"/> Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source										
<input type="checkbox"/> Other Government Department (OGD) Source - specify:										
<input type="checkbox"/> National Security Exception-see attached substantiation										
<input type="checkbox"/> No Substitute Requirement - see attached substantiation										
<input type="checkbox"/> Other Source Considerations - specify:										
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).										
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.					Funded AMOUNT:		\$525,000.00			
8) Expenditure Initiation Authority.										
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."					// Signature //					
					Date (DD/MMM/YYYY)		Name: BGen J. Janzen		Designation: DGMSC	
9) FAA Section 32 - Approval for TOTAL amount required.										
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."					// Signature //					
					Date (DD/MMM/YYYY)		Name: BGen J. Janzen		Designation: DGMSC	
10) Total requirement value CASH FLOW information - For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.										
Serial	FY	Amount	Fund	FC	CC or WBS	GL	IO	Source of funding	Funded or Unfunded	Remarks
1	2021	\$525,000.00	L101	0161XX	0161SC	4927	2505009			
2		\$0.00								
3		\$0.00								
4		\$0.00								
5		\$0.00								
6		\$0.00								
7		\$0.00								
8		\$0.00								
9		\$0.00								
10		\$0.00								
11) Procurement Initiation Authority (PIA). ** For requirements outside of ADM(Mat) **										
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).					Total Tax		13%		\$68,250.00	
					TOTAL AMOUNT (Taxes Included):		\$593,250.00			
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.					// Signature //					
					Date (DD/MMM/YYYY)		Name:		Designation:	
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.					// Signature //					
					Date (DD/MMM/YYYY)		Name:		Designation:	

s.19(1)

From: Kris Phillips <
Sent: April 21, 2020 9:18 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Re: EIR AAA

Close:

Fund. L101
Fund Centre. 0161XX
Cost Centre. 0161SC
GL. 4927 (will see if I can find my GL refs, but should be the same as last year) IO. 2505008 (this is the one that required mod on your EIR form; you had listed 2505009)

Sent from my iPad

> On Apr 21, 2020, at 8:01 AM, DOUGLAS.ALLISON@forces.gc.ca wrote:

>

> Kris,

>

> Can you confirm/update fin code in attachment and return to me. Thx

>

> Sent from my BlackBerry 10 smartphone on the Bell network.

> From: Doug Allison <

> Sent: Tuesday, April 21, 2020 8:00 AM

> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

> Subject: EIR AAA

>

>

>

>

> Sent from

> Mail<BLOCKEDgo[.]microsoft[.]com/fwlink/?LinkId=550986BLOCKED> for

> Windows 10

>

> <EIR AAA 20-21.xlsx>

s.19(1)

From: Kris Phillips
Sent: April 21, 2020 4:51 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Re: EIR AAA

Thanks. Just setting up the commitment. Can always amend as needed.

On Tue, Apr 21, 2020 at 4:44 PM <DOUGLAS.ALLISON@forces.gc.ca> wrote:

515 plus HST.sorry gotta. It work out to about 585K

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Kris Phillips
Sent: Tuesday, April 21, 2020 4:06 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Re: Fw: EIR AAA

How much are you looking to have committed for this year? \$525K?

On Tue, Apr 21, 2020 at 8:01 AM
<DOUGLAS.ALLISON@forces.gc.ca<<mailto:DOUGLAS.ALLISON@forces.gc.ca>>>
wrote:

Kris,

Can you confirm/update fin code in attachment and return to me. Thx

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Doug Allison
Sent: Tuesday, April 21, 2020 8:00 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: EIR AAA

Sent from Mail<BLOCKEDgo[.]microsoft[.]com/fwlink/?LinkId=550986BLOCKED>
for Windows 10

s.19(1)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 22, 2020 3:53 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Fw: AAA contract
Attachments: EIR AAA 20-21.xlsx; PRAT[4963] AAA 2020.doc; RFP_AAA_2020.doc

Folks, thanks for the feedback and assistance to date. It is much appreciated.

I have updated the attached docs. Before I send them to the BGEN for signature, could I ask that you review and point out errors/discrepancies/shortcomings.

Again, much appreciated.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Doug Allison < >
Sent: Wednesday, April 22, 2020 3:45 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA contract

Sent from [Mail](#) for Windows 10

Procurement Risk Assessment Tool (PRAT)

Instructions:

The originating Procurement Authority is responsible to:

- 1) use this form only when exercising Procurement Initiation Authority (PIA) (refer to PAM 1.4);
- 2) complete this form for each specific requirement, with the input from the Technical Authority (TA) or LCMM if clarifications are required.
- 3) answer all questions;
- 4) answer score 1 (low risk) if a question does not apply to your specific requirement;
- 5) Sum the Score Column to determine the risk level of the requirement:

If the total score is: 23-29 inc. the requirement is **low** risk
 30-56 inc. the requirement is **medium** risk
 57-97 inc. the requirement is **high** risk

- 6) Sign the form on the last page.
- 7) File the completed form in the procurement file with the requirement.

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
REQUIREMENTS DEFINITION	1	Recurring requirement: Is your requirement a <u>possible</u> recurring requirement which may limit competition in the future?	Score 1: Standalone requirement Or A recurring competitive requirement	Score 3: Non-competitive and follow-on requirement to a previous supplier OR Intellectual property (IP) or similar (e.g. unique expertise) resulting from the requirement may limit competition for future requirements for maintenance and support	Score 4: Intellectual property (IP) or similar (e.g. unique expertise) resulting from the requirement may limit competition for future requirements EXCLUDING maintenance and support	1
	2	Delivery/Lead time: What is the likely delivery lead time of your requirement in relation to your need / DND requirement(s)? Issues which may cause delay in delivery: <ul style="list-style-type: none"> ▪ Weather conditions ▪ Social conditions (ex.: possibility of a strike) ▪ Availability of raw material ▪ Shortage of labour in a specific field ▪ Rare and/or specialized expertise ▪ Economic conditions (budget cuts, budget freeze, etc) 	Score 1: No or negligible issues and delays will have little to no effect on DND business	Score 2: Potential for some issues / moderate delays or delays will have some effect on DND business	Score 4: Potential for significant issues / long lead time likely or delays will have significant effect on DND business	2

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
	3	Duration of contract: What is the duration of your requirements (including options)?	Score 1: Requirement has a duration of 3 years or less.	Score 2: >3 ≤ 4 years Score 3: >4 ≤ 5 years	Score 4: > 5 ≤ 10 years Score 5: > 10 years	1
	4	Advance approvals: Does your requirement contain a request for advance approvals such as: <ul style="list-style-type: none"> ▪ pre-approved amendments, ▪ pre-approved amounts for unscheduled work, design changes, etc. This DOES NOT include defined options such as: <ul style="list-style-type: none"> ▪ option years on a service contract ▪ option items on a goods contract 	Score 1: No advance approvals	Score 2: Advance approvals for anticipated additional work Score 3: Advance approvals for unscheduled work, design changes or work arising	Score 4: Advance approvals and conditions other than: <ul style="list-style-type: none"> ▪ Advance approvals for anticipated additional work ▪ Advance approvals for unscheduled work, design changes or work arising 	1
	5	Subcontract arrangements: Will your requirement require subcontract arrangements?	Score 1: No sub-contracts anticipated	Score 2: Possibility of sub-contracts but typical for this type of requirement	Score 4: Possibility of sub-contract(s) that are atypical for this type of requirement	1
	6	Comprehensive Land Claims Agreements (CLCAs): Will CLCAs apply to your requirement? Refer to PAM 3.1.1.1.3.4	Score 1: CLCAs do not apply	Score 3: CLCAs apply. The final delivery of the goods / services or the performance of the work take place in a Comprehensive Land Claims Settlement Area		1
PROCUREMENT	7	Urgent Approval of the procurement strategy: Does your requirement require an urgent approval?	Score 1: No urgency	Score 3: Urgent approval is required and is the result of unforeseen or emergency circumstances	Score 4: Urgent approval is required and is attributable to planning issues	1
	8	Extent of competition: Will your requirement be competed? Refer to <u>PAM 3.1.1.1</u>	Score 1: Competitive procurement using GETS (excluding Advance Contract Award Notifications (ACAN) requirements)	Score 2: Competitive procurement using a source list.	Score 5: Non-Competitive procurement (including ACAN requirements)	1
	9	Complaints and Challenges from industry: Is a history of industry's complaints or challenges associated to this type of requirement? Refer to PAM 4.4	Score 1: No complaints and/or challenges are expected	Score 3: Potential for complaints and/or challenges	Score 5: History of CITT challenges, ministerial or other type of complaints associated to this requirement or to similar types of requirement	1

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
	10	Occupational Health Safety and Environment (OHS&E): Does your requirement include any OHS&E issue?	Score 1: No OHS&E Issues	Score 2: Potential for some OHS&E issues but mitigation strategies have been identified Score 3: Potential for some OHS&E issues but no mitigation strategies have been identified	Score 5: History of OHS&E issues for the same or similar requirements (e.g. major workers' compensation claims, environmental claims, statutory penalties for safety infractions, etc.)	1
	11	Intellectual Property (IP): Does your requirement include any IP? <u>Refer to PAM 3.2.8, table 3.2.8-1, 5th block, Intellectual Property</u>	Score 1: No IP. Or Canada to own copyright Or Contractor to own IP, including copyright		Score 5: Canada to own IP	1
	12	Security: <u>Is there a requirement to ensure the security of federal government data, information, assets, human resources or other elements at risk?</u> Does your requirement require a Security Requirements Checklist (SRCL)? <u>Refer to PAM 1.7 and to PAM 3.2.12</u>	Score 1: No sensitive data or information is involved Assets and human resources will not be at risk SRCL is not required	Score 2: Either: Contractor personnel will require security screening (Protected A, B, or C) Or A Designated Organization Screening (DOS) is required (Protected A, B, or C)	Score 4: Contractor must hold a Facility Security Clearance (FSC) OR Contractor personnel will be required to hold a valid security clearance (Classified, Secret, Top Secret or NATO Secret) OR The contractor must hold a controlled goods registration	1
	13	Bid Evaluation: What type of Bid Evaluation criteria will be used to evaluate to bids? <u>Refer to PAM 3.5</u>	Score 1: Mandatory criteria only OR Combination of mandatory and point-rated criteria without qualitative judgment (e.g. a quantitative scoring grid is being used)	Score 2: Evaluation includes mandatory and point-rated criteria requiring subjectivity	Score 4: Evaluation includes multiple layers requiring assessment, making the evaluation complicated (e.g. combination of mandatory criteria, mandatory point rated criteria, point rated criteria without subjectivity and point rated criteria with subjectivity)	2

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
	14	Contractor Selection Methodology: What type of contractor selection methodology will be used? <u>Refer to PAM 3.5</u>	Score 1: Lowest-priced responsive bid OR not applicable (directed contract)	Score 2: Lowest cost-per-point responsive proposal Score 3: Highest compliant combined rating of technical merit and price where the factor for price \geq 30% OR Highest rated compliant proposal within a stipulated maximum budget	Score 4: Highest responsive combined rating of technical merit and price where the factor for price is less than (<) 30% Score 5: Highest technical responsive bid where price is not a factor in evaluation	3
MARKET/SUPPLIER CAPABILITY	15	Procurement Set-Aside for Aboriginal Business (PSAB): Do you anticipate any complaints with regards to the decision to use PSAB or not? <u>Refer to PAM 3.1.1.1.3.5</u>	Score 1: There is no expectation of complaint with regard to the decision to set aside or not	Score 2: Some complaints are anticipated with regard to the decision to set aside or not	Score 5: There is a history of complaints related to this type of requirement with regard to the decision to set aside or not	1
	16	Potential vendors: Are there many potential vendors in the market that can fulfil your requirement?	Score 1: There are many potential Vendors in the market.	Score 2: There is a limited number of interested Vendors in the market..	Score 4: There is only one potential qualified Vendor. Or There are likely no potential Vendors that can meet the requirement.	2
	17	Market Conditions: Are there any market conditions that may impact the contract deliverables? Some examples are: <ul style="list-style-type: none"> ▪ The source of supply is unique or unreliable ▪ There is competition for scarce materials ▪ There is a risk of currency fluctuation ▪ There is a possibility of a strike 	Score 1: No market issues	Score 2: Some market conditions may impact contract deliverables	Score 4: Known difficulties with market conditions that will impact contract deliverables and require contingency	2
Financial Characte	18	Progress Reporting: Will progress reports be required?	Score 1: No progress reports required OR Well-defined progress report structure		Score 4: Progress reporting is required but reporting process has not been defined yet.	4
	19	Basis of Payment: What will be the basis of payment? Note: If multiple bases of payments apply, score it according to the most risky method (i.e. other	Score 1: Firm price (e.g. firm unit price for goods) Or Ceiling price	Score 2: Any Basis of payment other than firm price or ceiling price	Score 4: Unable to determine an appropriate basis of payment (input from the Contracting Authority (CA) is required)	1

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
		than firm price or ceiling price) Refer to PAM 3.1.2				
	20	Method(s) of Payment: What will be the method(s) of payment? Note: If multiple methods of payments apply, score it according to the most risky method (i.e. other than payment upon delivery and acceptance) <u>Refer to PAM 3.1.3</u>	Score 1: Payment upon delivery and acceptance	Score 2: -Progress (e.g. bi-weekly, monthly, quarterly) or milestones payments or -Payment in advance by acquisition card or -Payment in advance for Foreign Military Sales or -Advance payments for maintenance contracts (IM/IT) or -Advance payments for subscriptions and insurance premiums Score 3: Advance payments where there is a long and entrenched tradition or practice of receiving advance payments from the purchaser in a particular industry or segment of industry (other than IM/IT maintenance contracts, subscriptions or insurance premiums) Justification must be kept on file	Score 5: Advance Payments under one or more of the following situations: -in exceptional situations, such as armament purchases or extended warranty service, where up-front payments must be made to the supplier -where there is economic advantage to Canada that clearly outweighs the financial cost associated with the advance payment -the contractor could suffer hardship or provide financing only with difficulty or at rates considered to be uneconomical -the value of the contract is considered to be beyond the assessed financial capabilities of the contractor OR Any other situation where advance payments are to be made Justification must be kept on file	2
	21	Minimum Guarantees (profit, revenue, work guarantees) to the supplier: Will the department request that the contract include any minimum guarantees to the supplier?	Score 1: No guarantees Or Unknown at this point Or No work guarantee clause included	Score 2: Guarantees ≤ 10% of contract value	Score 4: Guarantees > 10% ≤ 20% of Contract value Score 5: Guarantees > 20% of Contract Value	1
	22	Performance Incentives (liquidated damages, holdbacks, etc.): Will the contract include any performance incentives?	Score 1: No Performance Incentives. OR Standard 10% holdback terms		Score 4: Performance Incentives required, beyond the standard, such as liquidated damages	1
OTHER RELATE	23	Public Interest and Sensitivity: Will your requirement raise any public interest or does it contain any sensitivity?	Score 1: No Public awareness concern as it is a standard contract for common goods or services	Score 3: Some media attention is possible	Score 4: Has already been in media and expect continuation of coverage Or	3

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
					Expect negative coverage and significant upward briefing	
TOTAL SCORE						35

If the total score is: 23-29 inc., the requirement is **low** risk
 30-56 inc., the requirement is **medium** risk
 57-97 inc., the requirement is **high** risk

Risk Level: _____ Medium _____

Name of the Procurement Authority (PA): _____ BGen Jay Janzen _____

Position/rank of the PA: _____ DGMSC _____

Signature of the PA: _____ Date: _____ Phone number: _____

When the risk level has been assessed as medium (and the requirement is above \$2M) or high, the requirement and PRAT must be forwarded to the Director of your procurement directorate (refer to PAM 1.4).

Procurement directorate: _____

Name of the Procurement Authority (PA): _____

Position/rank of the PA: _____

We agree with the above procurement risk assessment of the requirement and the PIA functions will be exercised by us.

Signature of the PA: _____ Date: _____ Phone number: _____



Défense nationale

National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2

**REQUEST FOR PROPOSAL
 DEMANDE DE PROPOSITION**

**RETURN BIDS TO:
 RETOURNER LES SOUMISSIONS À :**

National Defence Headquarters
 Director Services Contracting 4 (D Svcs C 4)
 Attention: Kent Johnston
 By e-mail to:
DSvcsC4Contracting-
DCSvcs4Contrats@forces.gc.ca

Proposal To: National Defence Canada

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods and services listed herein and on any attached sheets at the price(s) set out therefore.

Proposition à : Défense nationale Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens et services énumérés ici et sur toute feuille ci-annexée, au(x) prix indique(s).

Comments – Commentaires

THIS DOCUMENT DOES NOT CONTAIN A SECURITY REQUIREMENT.

**Solicitation Closes –
 L'invitation prend fin**

At: – à :
 02:00 PM Eastern Standard Time (EDT)

On: – le :
 April 2019

Title – Titre	Solicitation No. – N° de l'invitation
Actor and Audience Analysis Training	W6369-19-X033/A
Date of Solicitation – Date de l'invitation March 2019	
Address Enquiries to: – Adresser toutes questions à : Kent Johnston by e-mail to Kent.Johnston@forces.gc.ca	
Telephone No. – N° de téléphone	FAX No. – N° de fax
Destination See herein.	

Instructions: Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions : Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente harmonisée doit être indiqué séparément.

Delivery Required – Livraison exigée	Delivery Offered – Livraison proposée
Vendor Name and Address – Raison sociale et adresse du fournisseur	
Name and title of person authorized to sign on behalf of vendor (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie)	
Name – Nom _____	Title – Titre _____
Signature _____	Date _____



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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

There is no security requirement applicable to this contract.

1.2 Statement of Work

The contractor must perform the work in accordance with the Statement of Work at Annex "A".

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

1.4 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2018-05-22), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 4 of section 05, Submission of bids, is amended as follows:

Delete: 60 days

Insert: ninety (90) calendar days

Section 06, Late bids, is deleted in its entirety.

The text under section 07, Delayed bids, is deleted in its entirety and replaced with the following:

It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Misrouting or other electronic delivery issues resulting in late submission of bids will not be accepted.

Subsection 1 of section 08, Transmission by facsimile, is deleted in its entirety.

The text under section 13, Communications - solicitation period, is deleted in its entirety and replaced with the following:

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only as indicated on page 1 of the bid solicitation. Failure to comply with this requirement may result in the bid being declared non-responsive.

Canada will submit all significant enquiries received and their replies directly to invited Bidders by electronic mail. For further information, consult subsection 3 of the Submission of bids section.

Subsection 2 of section 20, Further information, is deleted in its entirety.

2.2 Submission of Bids

Unless otherwise specified in the bid solicitation or directed by the Contracting Authority, bids must be received by the Contracting Authority by electronic mail by the date and time indicated on page 1 of the bid solicitation.

Electronic Submissions: Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. The Contracting Authority will confirm receipt of documents. It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Bidders should not assume that all documents have been received unless the Contracting Authority confirms receipt of each document. In order to minimize the potential for technical issues, Bidders are requested to allow sufficient time before the closing date and time to confirm receipt. Technical and financial documents received after the closing date and time will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the

Royal Canadian Mounted Police. A former public servant may be:

- (a) an individual;
- (b) an individual who has incorporated;
- (c) a partnership made of former public servants; or
- (d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c. C-17, the Defence Services Pension Continuation Act, 1970, c. D-3, the Royal Canadian Mounted Police Pension Continuation Act, 1970, c. R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c. R-11, the Members of Parliament Retiring Allowances Act, R.S., 1985, c. M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

If so, the Bidder must provide the following information for all FPS in receipt of a pension, as applicable:

- (a) name of former public servant; and
- (b) date of termination of employment or retirement from the Public Service.

By providing this information, bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes () No ()

If so, the Bidder must provide the following information:

- (a) name of former public servant;
- (b) conditions of the lump sum payment incentive;
- (c) date of termination of employment;
- (d) amount of lump sum payment;
- (e) rate of pay on which lump sum payment is based;
- (f) period of lump sum payment including start date, end date and number of weeks; and
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that bidders provide their bid in separate sections as follows:

Section I: Technical Bid – one (1) soft copy submitted by e-mail;
Section II: Financial Bid – one (1) soft copy submitted by e-mail;
Section III: Certifications – one (1) soft copy submitted by e-mail; and
Section IV: Additional Information – one (1) soft copy submitted by e-mail.

Prices should appear in the financial bid only. No prices should be indicated in any other section of the bid.

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) page size; and
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement.

To assist Canada in reaching its objectives, bidders should use the environmentally-preferable format of black and white instead of colour.

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

3.1.1 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 1 to Part 3, Electronic Payment Instruments, to identify which ones are accepted.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.1.2 SACC Manual Clauses

C3011T (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

Bidders must submit the certifications and additional information required under Part 5.

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ATTACHMENT 1 to PART 3 - ELECTRONIC PAYMENT INSTRUMENTS

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.1, the Bidder must identify which electronic payment instruments they are willing to accept for payment of invoices.

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

4.1.1.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder has not submitted this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- o Contracts all signed by A;
- o Contracts all signed by B; or
- o Contracts all signed by A and B in joint venture, or
- o Contracts signed by A and contracts signed by A and B in joint venture, or
- o Contracts signed by B and contracts signed by A and B in joint venture.

that show in total 100 billable days.

4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4

4.1.2 Financial Evaluation

4.1.2.1 For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Basis of Payment detailed in Annex B.

4.2 Basis of Selection

SACC Manual Clause A0035T (2005-05-25), Basis of Selection – Lowest Price per Point.

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation;
 - b. meet all mandatory technical evaluation criteria; and
 - c. Obtain the required minimum of **44 points** overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 110 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the lowest evaluated price per point will be recommended for award of a contract.

ATTACHMENT 1 TO PART 4 – EVALUATION CRITERIA

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

	Mandatory Requirement	Met / Not Met	Supporting Detail or Cross Reference to Bidder's Proposal
MT1	The Bidder must clearly demonstrate it has experience <u>delivering teaching</u> a minimum of one (1) Actor and Audience Analysis (TAAAAA) methodology course/workshop in a group setting where the main topic of the course/workshop was the TAAAAA methodology.		The Bidder should provide complete details as to whom the course/workshop was delivered and when (month and year) the training experience was obtained.
MT2	The Bidder must clearly demonstrate that it has the ability to deliver the course, all or in part, through a Distance Learning (DL) process.		The Bidder must have a course that can be effectively delivered via DL and an adequate platform to accommodate up to 24 students.
MT3	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience <u>teaching a minimum of one (1) Actor and Audience Analysis (TAAAAA) methodology workshop/course.</u>		The Bidder should provide complete details as to whom the course/workshop was delivered and when (month and year) the training experience was obtained.
MT4	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning 		The Bidder should provide details from previous courses delivered or describe of how they intend to meet the criterion.

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	materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students.		
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2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

	Rated Requirement	Scoring	Supporting Detail or Cross Reference to Bidder's Proposal
RT1	The bidder should clearly demonstrate it has experience <u>delivering teaching</u> more than one (1) Actor and Audience Analysis (TAAAAA) methodology course/workshop in a group setting where the main topic of course/workshop was the TAAAAA methodology.	1 to 2 workshops/courses = 10pts 3 to 5 workshops/courses = 20pts 6+ to 7 workshops/courses = 30pts 8+ workshops/courses = 40pts	The Bidder should provide complete details as to whom the course/workshop was delivered and when (month and year) the training experience was obtained.
RT2	The Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching TAAAAA methodology workshops/courses.	1 to 4 to 2 workshops/courses = 10pts 3 to 5 workshops/courses = 20pts 6 to 6 workshops/courses = 30pts 7+ workshops/courses = 40pts	The Bidder should provide complete details as to whom the course/workshop was delivered and when (month and year) the training experience was obtained.
RT3	The Bidder should clearly demonstrate it has provided TAAAAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one (1) NATO organization or ally = 10 pts OR Training provided to NATO	The Bidder should provide complete details as to whom the course/workshop was delivered and when (month and

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		ally(ies) AND NATO organization(s) = 20 pts	year) the training experience was obtained.
RT4	The bidder should clearly demonstrate it has provided TAAAAA training to in a military audience setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	The Bidder should provide complete details as to whom the course/workshop was delivered and when (month and year) the training experience was obtained.
TAAAAA Methodology- Points Available:			
Minimum Points Required:			44 points (40%)
Total Points Available:			110 points

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real procurement agreement of the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

SACC Manual clause A3005T (2010-08-16) Status and Availability of Resources

5.2.3.2 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

6.1 Security Requirements

There is no security requirement applicable to the Contract.

6.2 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex A.

6.3 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

2010B (2018-06-21), General conditions: Professional services (medium complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4007 (2010-08-19), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

This period of the contract is from date of contract award to 31 Jan 2020 (estimated).

The work must be completed by 30 Nov 2018.

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____
Title: _____
Department of National Defence
Directorate: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

6.5.2 Technical Authority

The Technical Authority for the Contract is:

Name: LCol Doug Allison
Title: DG Mil StratCom Force Development
Organization: ADM(PA) _____
Address: NDHQ Carling _____
Telephone: 613-901-_____-4697
Facsimile: _____
E-mail address: Douglas.Allison@forces.gc.ca _____

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contractor's Representative

To be inserted at Contract award

6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) (<http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html>) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada (http://www.tbs-sct.gc.ca/pubs_pol/dcqpubs/contpolnotices/siglist-eng.asp).

6.7 Payment

6.7.1 Basis of Payment

For the Work described in Annex A, Statement of Work:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price, for a cost of \$ _____ (*insert the amount at contract award*). Customs duties are excluded and Applicable Taxes are extra.

For the firm price portion of the Work only, Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

6.7.2 Limitation of Price

SACC Manual clause C6000C (2017-08-17), Limitation of Price

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

6.7.3 Milestone Payments

H3010C (2016-01-28), Milestone Payments - Not subject to holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment using PWGSC-TPSGC 1111, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

H4012C (2010-01-11), Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount	Due Date or "Delivery Date"
1	<ul style="list-style-type: none"> i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings. 	20% of firm lot price, period of the contract.	<ul style="list-style-type: none"> i. Within the 1st month of the contract upon receipt of applicable invoices.
2	<ul style="list-style-type: none"> i. Completion 	40% of firm lot	<ul style="list-style-type: none"> ii. Upon

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		of training for 1 st half of course.	price, period of the contract.	completion of 1 st half of course (upon receipt of invoice).
3	i.	Completion of training for 2nd half of course.	40% of firm lot price, period of the contract	i. Upon completion of 2 st half of course (upon receipt of invoice).

6.7.4 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. VISA Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

6.8 Invoicing Instructions

6.8.1 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the General Conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of the release document and any other documents as specified in the Contract;
and
- b. a copy of the invoices, receipts, vouchers for all direct expenses

Invoices must be distributed as follows:

- a. The original must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information

are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario

6.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (c) general conditions 2010B (2018-06-21), General conditions: Professional Services (medium complexity);
- (c) Annex A, Statement of Work
- (d) Annex B, Basis of Payment
- (e) Annex C, Non-Disclosure Agreement;
- (f) the Contractor's bid dated _____ (*insert date of bid*)

6.12 SACC Manual Clauses

G1005C (2016-01-28), Insurance - No Specific Requirement
A9068C (2010-01-11), Government Site Regulations
A9117C (2007-11-30), T1204 - Direct Request by Customer Department
A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)
or
A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS) direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified Actor and Audience Analysis (TAAAAA) as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.2. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAAAAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAAAAA methodology. By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAAAAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a tailored course teaching a TAAAAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) Provided that travel restrictions permit, a portion of The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) **The course must be completed by 30 Nov 2020~~19~~**;
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
 - 4.1.f.i.1. ~~The focus of the case study is TBD will focus on determining why women between the ages of 18-30 in the Greater Toronto Area (GTA) are not interested in enrolling in Naval technical trades;~~

- ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- (g) The course must involve a blend of DL classroom lectures, syndicate work, student presentations and activities;
- (h) Course material must be current and reflect any recent developments in Actor and Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must:

- 6.1. design and conduct a Actor and Audience Analysis course which ends no later than 30 Nov+4 March, 2020+9 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis;
- 6.2. arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), excluding those already provided by the place of instruction (ie-electronic projectors and flip charts);
- 6.3. provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students;
- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research.
- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
- 6.7. design, conduct and assess written examinations, individual and syndicate presentations; and
- 6.8. provide course certificates of completion to each student at the end of the course.

7. REPORTING REQUIREMENTS

- 7.1. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;

- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

7.2. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

8. LANGUAGE REQUIREMENTS

8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

9. TRAVEL

9.1. Travel to the location of work will be the responsibility of the Contractor. Travel will not be reimbursed separately. As such, it is the responsibility of the contractor to factor in any travel related costs when submitting their bid.

9.2. The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction, including the live case study.

10. LOCATION OF WORK

10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

ANNEX B – BASIS OF PAYMENT

1. Contract Period (From Contract Award to 31 Jan 2020)

A. During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1.1 Schedule of Milestones

A. The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount
1	i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings. (20% of overall price)	\${amount to be specified in the resulting Contract}
2	i. Completion of training for 1 st half of course. (40% of overall price)	\${amount to be specified in the resulting Contract}
3	i. Completion of training for 2 nd half of course. (40% of overall price)	\${amount to be specified in the resulting Contract}

NOTE: The above milestones MUST include any travel & living expenses for all contracted personnel and live case study instructors.

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ANNEX C - NON-DISCLOSURE AGREEMENT

(This annex is to be completed after contract award and is not required in the bid.)

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. W6369-19-X033/A between Her Majesty the Queen in right of Canada, represented by the Department of National Defence and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: _____ (insert number).

Signature

Date

From: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull
Sent: April 23, 2020 8:55 AM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: Re: AAA contract

Thx Anna Maria,

Can I assume that by doing it this way it makes it easier to run a subsequent RFP in the following year?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Wednesday, April 22, 2020 7:25 PM
To: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull; +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW: AAA contract

Good evening LCol Allison,

I reviewed the PRAT and EIR. PRAT looks good. Made some updates to the EIR.

The EIR needs to include a fully funded initial contract period (\$525K), plus list the unfunded option periods (I included them, please review). The recommended contract period is an initial contract period of one year plus two (2) one-year option periods. Please confirm.

Thanks,

Anna Maria Mangone

Spécialiste en approvisionnement, DC Svcs 4-3
Ministère de la Défense nationale / Gouvernement du Canada
Anna-Maria.Mangone@forces.gc.ca / Tél. : 819-939-8485 / RCCC : 997-3316 / ATS : 1-800-467-9877

Procurement Specialist, D Svcs C 4-3
Department of National Defence / Government of Canada
Anna-Maria.Mangone@forces.gc.ca / Tel: 819-939-8485 / CSN: 997-3316 / TTY: 1-800-467-9877

From: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull
Sent: April 22, 2020 3:53 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Subject: Fw: AAA contract

Folks, thanks for the feedback and assistance to date. It is much appreciated.

I have updated the attached docs. Before I send them to the BGEN for signature, could I ask that you review and point out errors/discrepancies/shortcomings.

Again, much appreciated.

Sent from my BlackBerry 10 smartphone on the Bell network.

s.19(1)

From: Doug Allison <
Sent: Wednesday, April 22, 2020 3:45 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA contract

Sent from [Mail](#) for Windows 10

From: Jay Janzen
Sent: April 24, 2020 4:51 PM
To: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull
Subject: Signed AAA Document 1
Attachments: Scan Apr 24, 2020 at 4.50 PM.pdf

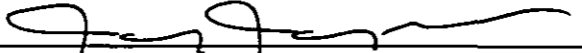
Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
					Expect negative coverage and significant upward briefing	
TOTAL SCORE						35

If the total score is: 23-29 inc., the requirement is **low risk**
 30-56 inc., the requirement is **medium risk**
 57-97 inc., the requirement is **high risk**

Risk Level: Medium

Name of the Procurement Authority (PA): BGen Jay Janzen

Position/rank of the PA: DG MSC

Signature of the PA:  Date: 24 Apr 20 Phone number: 613-617-4585

BGEN JAY H. JANZEN
DG STRATCOM

When the risk level has been assessed as medium (and the requirement is above \$2M) or high, the requirement and PRAT must be forwarded to the Director of your procurement directorate (refer to PAM 1.4).

Procurement directorate: _____

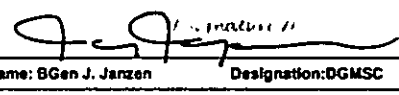
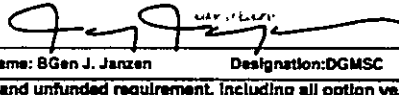
Name of the Procurement Authority (PA): _____

Position/rank of the PA: _____

We agree with the above procurement risk assessment of the requirement and the PIA functions will be exercised by us.

Signature of the PA: _____ Date: _____ Phone number: _____

EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE:		W6369-21-X008 - RFP - Actor and Audience Analysis (AAA) Training								
ORIGINAL	MODIFICATION & NO.	DATE (15 April 2019)								
1) Project Manager (PM) or Technical Authority (TA)										
Name:	Doug Allison									
Title:	ADM(PA) DGMSC FD									
Designation:										
Organization:	ADM (PA)									
Address:	NDHQ Carling, 60 Moodie Dr Pavilion Bldg									
Telephone Number:	613-901-4697									
Facsimile (optional):										
Email:	Dougles.Allison@forces.gc.ca									
2) Requirement - MANDATORY										
Summary of the Requirement										
Actor and Audience Analysis (AAA) is a required capability to support Joint Targeting, Information Operations and Strategic Communication. Strategic Communication and Information Operations are SSE-related initiatives which have CDS initiating directives for implementation. ADM (PA) plans to provide an AAA capability that will support these initiatives in FY 20/21. This will require the additional training of CAF and DND personnel on a suitable AAA methodology, a training methodology which does not currently exist in the CAF nor DND. There are no suitable foreign military options which could deliver in time. It is therefore necessary to engage an entity to provide training on a methodology suitable for the CAF's needs.										
Basis of Payment										
Firm Price - Milestone Payments										
Recurring Requirement										
3) Description of Goods and/or Services										
<input checked="" type="checkbox"/> List of Deliverables, Statement of Work/Requirement or Quote is attached										
<input type="checkbox"/> Line Item Details attached										
<input type="checkbox"/> Hazardous Material										
<input type="checkbox"/> Controlled Goods										
<input type="checkbox"/> Quality Assurance (QA)										
<input type="checkbox"/> Technical Data Package (TDP)										
4) Technical Evaluation - MANDATORY except for Sole Source Requirements. Select one of the following:										
<input type="checkbox"/> Selection Methodology - Select one of the following										
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on Mandatory criteria only)										
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on a combination of Mandatory and Point-Rated criteria)										
<input type="checkbox"/> Lowest Responsive Cost-per-Point Proposal										
<input checked="" type="checkbox"/> Highest Responsive Combined Rating of Technical Merit and Price (e.g. 60/40 or 70/30)										
<input type="checkbox"/> Highest-Rated Responsive Proposal within a Specified Maximum Budget										
<input type="checkbox"/> See attached Mandatory Technical Evaluation Criteria (for simple goods or services)										
<input type="checkbox"/> See attached Evaluation Plan (for complex goods or services)										
5) Security Requirements - MANDATORY										
<input type="checkbox"/> Completed Security Requirements Check List (SRCL) form attached										
6) Procurement Strategy Considerations - MANDATORY (select one)										
<input checked="" type="checkbox"/> Competitive Requirement										
<input type="checkbox"/> Sole Source Requirement										
<input type="checkbox"/> Sole Source Requirement and exception 6 (d) of the GCRs applies.										
<input type="checkbox"/> Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source										
<input type="checkbox"/> Other Government Department (OGD) Source - specify:										
<input type="checkbox"/> National Security Exception-see attached substantiation										
<input type="checkbox"/> No Substitute Requirement - see attached substantiation										
<input type="checkbox"/> Other Source Considerations - specify:										
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).										
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.		Funded AMOUNT:	\$525,000.00							
8) Expenditure Initiation Authority.										
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."		24/04/2020	 Name: BGen J. Janzen Designation: DGMSC							
9) FAA Section 32 - Approval for TOTAL amount required.										
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."		24/04/2020	 Name: BGen J. Janzen Designation: DGMSC							
10) Total requirement value CASH FLOW information - For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.										
Serial	FY	Amount	Fund	FC	CC or WBS	GL	ID	Source of funding	Funded or Unfunded	Remarks
1	20/21	\$525,000.00	L101	0161XX	0161SC	4927	2505008		Funded	Comm # R0161SC002
2	21/22	\$525,000.00	L101	0161XX	0161SC	4927	2505008		Unfunded	Comm # R0161SC002
3	22/23	\$525,000.00	L101	0161XX	0161SC	4927	2505008		Unfunded	Comm # R0161SC002
4		\$0.00								
5		\$0.00								
6		\$0.00								
7		\$0.00								
8		\$0.00								
9		\$0.00								
10		\$0.00								
11) Procurement Initiation Authority (PIA) - For requirements outside of ADM (M8)										
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).		Total Tax	13%	\$204,750.00						
		TOTAL AMOUNT (Taxes Included):		\$1,779,750.00						
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.		Date (DD/MM/YYYY) Name:		Designation:						
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.		Date (DD/MM/YYYY) Name:		Designation:						

From: Jay Janzen
Sent: April 24, 2020 4:51 PM
To: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull
Subject: Signed AAA Document 1
Attachments: Scan Apr 24, 2020 at 4.50 PM.pdf

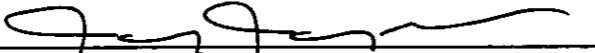
Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
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Risk Level: Medium

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Signature of the PA:  Date: 24 Apr 20 Phone number: 613-617-4585

BGEN JAY H. JANZEN
DG STRATCOM

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Procurement directorate: _____

Name of the Procurement Authority (PA): _____

Position/rank of the PA: _____

We agree with the above procurement risk assessment of the requirement and the PIA functions will be exercised by us.

Signature of the PA: _____ Date: _____ Phone number: _____

s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 27, 2020 10:27 AM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs
C@Ottawa-Hull
Subject: Fw: Signed AAA Document 2
Attachments: Scan Apr 24, 2020 at 4.51 PM.pdf

First of two

Sent from my BlackBerry 10 smartphone on the Bell network.

Original Message

From: Jay Janzen <

Sent: Friday, April 24, 2020 4:52 PM

To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

Subject: Signed AAA Document 2

s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 27, 2020 10:28 AM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs
C@Ottawa-Hull
Subject: Fw: Signed AAA Document 1
Attachments: Scan Apr 24, 2020 at 4.50 PM.pdf

Second of two

Sent from my BlackBerry 10 smartphone on the Bell network.

Original Message

From: Jay Janzen

Sent: Friday, April 24, 2020 4:51 PM

To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

Subject: Signed AAA Document 1

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 27, 2020 3:36 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Fw: AAA contract
Attachments: PRAT[4963] AAA 2020.doc; RFP_AAA_2020.doc; W6369-21-X008 - EIR.xlsx

Anna Maria,

I didn't change anything in the PRAT based on your suggestion below other than to ask the BGEN to sign. He was sent the complete doc, only scanned and sent back his signature page.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Sent: Wednesday, April 22, 2020 7:25 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW: AAA contract

Good evening LCol Allison,

I reviewed the PRAT and EIR. PRAT looks good. Made some updates to the EIR.

The EIR needs to include a fully funded initial contract period (\$525K), plus list the unfunded option periods (I included them, please review). The recommended contract period is an initial contract period of one year plus two (2) one-year option periods. Please confirm.

Thanks,

Anna Maria Mangone

Spécialiste en approvisionnement, DC Svcs 4-3
Ministère de la Défense nationale / Gouvernement du Canada
Anna-Maria.Mangone@forces.gc.ca / Tél. : 819-939-8485 / RCCC : 997-3316 / ATS : 1-800-467-9877

Procurement Specialist, D Svcs C 4-3
Department of National Defence / Government of Canada
Anna-Maria.Mangone@forces.gc.ca / Tel: 819-939-8485 / CSN: 997-3316 / TTY: 1-800-467-9877

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 22, 2020 3:53 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
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To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA contract

Sent from Mail for Windows 10

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 28, 2020 1:35 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Re: AAA contract

Thx. Appreciate the help.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: Tuesday, April 28, 2020 12:36 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: AAA contract

Noted, I forwarded it to Johanne. Please communicate with her moving forward regarding the file.

Feel free to contact the inbox should you have any general procurement related questions or requirements to be actioned.

Thanks,

Anna Maria Mangone

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Department of National Defence / Government of Canada
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Sent: April 27, 2020 3:36 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull) <P-OTG.DSvcsC4Proc@intern.mil.ca>
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Sent: Wednesday, April 22, 2020 7:25 PM
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Subject: FW: AAA contract

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s.19(1)

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Anna Maria Mangone

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Subject: Fw: AAA contract

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Sent from my BlackBerry 10 smartphone on the Bell network.

From: Doug Allison <doug.allison@defence.gc.ca>
Sent: Wednesday, April 22, 2020 3:45 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA contract

Sent from [Mail](#) for Windows 10

From: [DeRito_J@ADM\(Mat\)_D_Svcs_C@Ottawa-Hull](mailto:DeRito_J@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: May 5, 2020 1:50 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: RE: W6369-19-X033/A - contract close

☺ Thank you.

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: May 5, 2020 1:34 PM
To: DeRito_J@ADM(Mat)_D_Svcs_C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Thx for your help.

Stay safe :)

Sent from my BlackBerry 10 smartphone on the Bell network.

From: DeRito_J@ADM(Mat)_D_Svcs_C@Ottawa-Hull
Sent: Tuesday, May 5, 2020 1:31 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: W6369-19-X033/A - contract close

Thank you for the information.

I will review the documents and contact you should I need any additional information.

Best regards,

JDR.

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: May 5, 2020 1:10 PM
To: DeRito_J@ADM(Mat)_D_Svcs_C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Johanne,

See attachments. Hopefully this will meet your requirements.

One course annually

Lets go with the Task Authorization

From: DeRito_J@ADM(Mat)_D_Svcs_C@Ottawa-Hull
Sent: May-05-20 12:04 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: FW: W6369-19-X033/A - contract close

Good afternoon LCol Allison,

To proceed we require the following:

A revised signed EIR including two (2) unfunded option years,

An updated evaluation criteria,
Confirmation of how many courses are required on an annual basis,
Confirmation that you wish to proceed with a Task Authorization Contract or wish mirror the
previous Contract.

If you proceed with A task authorization (TA) contract is for “as-and-when-requested work”; so
each time you need to conduct a course, we’d raise a DND626 (what DND calls a task
authorization – see attached form).
This allows for greater tracking of spending and for flexibility if there are funding uncertainties.
Also used for contracts that don’t have a full time level of effort (LOE). As well, the contractor can’t
start the work until a signed DND626 has been issued.

There won’t be a big difference from the previous contract except that we’ll need to issue a
DND626 each time a course is required.

Further info can be found here: <http://materiel.mil.ca/en/business-functions-procurement-contracting/pam-3-3-2.page> and <http://materiel.mil.ca/en/business-functions-procurement-contracting/pam-3-3-11.page#pam-3.3.11.h>

If possible, could you send me an email with all the documents under the same email as I do not
have a printer and am working from home and do not have access to a computer.

Best regards,

Johanne De Rito

Direction - Contrats de services, D Svcs C 4-2-2
Ministère de la Défense nationale | Gouvernement du Canada

Director Services Contracting, D Svcs C 4-2-2
Department of National Defence | Government of Canada

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 20, 2020 2:58 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
<JOHANNE.DERITO@forces.gc.ca>; +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs
C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Abboud L@ADM(Mat) D Svcs
C@Ottawa-Hull <LINDA.ABBOUD@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Anna,

Super feedback and thanks for this. Wilco.

What does task authorization contract entail?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, April 20, 2020 2:50 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull;
+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; Abboud

L@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: RE: W6369-19-X033/A - contract close

Good afternoon LCol Allison,

Please find attached the PRAT. The previous contract didn't include a security requirement, therefore an SRCL isn't required for the follow on contract (unless that situation has changed, please advise and I'll send the SRCL template).

In addition to the docs Johanne mentioned below, you'll also need to provide an updated evaluation criteria. You can use the evaluation criteria at Attachment 1 to Part 4 of the attached RFP as your starting point.

I've assigned your requirement the following file number: W6369-21-X008.

Johanne – please add this requirement to the file tracker. I also noticed that the RFP used SACC 2010B (medium complexity) and SACC 4007 – Canada to Own Intellectual Property Rights in Foreground Information. Technically, if we want to use 4007 again for this new contract, we need to use SACC 2035 – General Conditions – Higher Complexity – Services. The docs for 19-X033/A are saved in RDIMS (except the contract).

I also suggest that :

- the follow on contract include option periods so that we're not re-soliciting for this requirement every year. Please confirm how many option periods are required (they can be listed as unfunded in the EIR but the initial contract period must be funded);
- make this new contract a Task Authorization (TA) contract; and
- confirm how many courses per year are required.

Thanks,

Anna Maria Mangone

Spécialiste en approvisionnement, DC Svcs 4-3
Ministère de la Défense nationale / Gouvernement du Canada
Anna-Maria.Mangone@forces.gc.ca / Tél. : 819-939-8485 / RCCC : 997-3316 / ATS : 1-800-467-9877

Procurement Specialist, D Svcs C 4-3
Department of National Defence / Government of Canada
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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 20, 2020 1:59 PM
To: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>; +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Subject: Re: W6369-19-X033/A - contract close

Johanne, Thx for your reply.

I have an updated SOW and will have a signed EIR soon as well. Can you forward a copy of an SRCL and PRAT.

Appreciate your help

Sent from my BlackBerry 10 smartphone on the Bell network.

From: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, April 20, 2020 12:26 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: RE: W6369-19-X033/A - contract close

Good afternoon Sir,

Thank you for your email; all is good with my family. Hope that you and your loved ones are also safe and in good spirits.

The above mentioned contract expired, therefore we must proceed with a new requirement.

The documentation must be submitted to our positional mailbox (+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull) to be tracked and assigned to a Procurement Officer.

Please note that to proceed we will require the following:

A signed Expenditure Initiation requires (EIR) form that indicates the approved funding – the amount must be included on the EIR.

SRCL

SOW

Procurement Risk Assessment Tool (PRAT)

Best regards,

Johanne De Rito

Agente supérieur d'approvisionnement, Direction - Contrats de services, D Svcs C 4-2-2
Ministère de la Défense nationale | Gouvernement du Canada
Johanne.DeRito@forces.gc.ca | Tél: 819.939-8451

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-2
Department of National Defence | Government of Canada
Johanne.DeRito@forces.gc.ca | Tel: (819) 939-8451

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: April 19, 2020 2:28 PM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Hi Johanne,

Hope this e-mail finds you and your family well.

I am in the process of updating the SOW for a second iteration of this course. Are you the correct person to contact in order to get the process started?

D. Allison
LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-24-19 7:56 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull <JOHANNE.DERITO@forces.gc.ca>
Subject: FW: W6369-19-X033/A - contract close

Good morning Lieutenant Colonel Allison,

You had confirmed that no contract extension or follow-on contract is required. However, if the situation changes, you can contact Johanne De Rito (CC'd). As I mentioned in a previous email, I'll be leaving the DND at the beginning of January. Have a wonderful holiday season.

Best regards,

Sharon

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sharon.sally@forces.gc.ca / Tél : 819-939-8990

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Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 18, 2019 10:07 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good morning Sir,

I was on leave yesterday. We can close the file. There is no problem. I wanted to ensure the Target Audience Analysis (X033/A) was on track to close at the end of January without an extension and that a subsequent (follow-on) contract was not required. I called earlier, but you were not available. If anything at all is required, don't hesitate to contact me.

Best regards,

Sharon

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From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: December 17, 2019 6:19 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Subject: Re: W6369-19-X033/A - contract close

Sharon

We continue to await the arrival of receipts from the contractor. The course has been delivered and we are satisfied that all conditions in the contract have been met.

Is there something I am missing on this? Any interim or scheduled payments are authorized. Do we have to initiate that process?
Could you please give me a call this morning to discuss. I should be available after 1000.

Sorry for any misunderstanding. I would like to close this as well.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, December 16, 2019 2:27 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Cc: DeRito J@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison,

I am contacting you with regarding the W6369-19-X033/A Target Audience Training contract. As the end date is fast approaching (January 31st, 2020), please let us know if a follow-on contract and/or contract extension is required. I will be leaving the DND as of January 3rd, however, you may contact Johanne De Rito (CC'd) for assistance following this date. Thank you very much.

Best regards,

Sharon

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Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December 5, 2019 12:34 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - contract close

Good afternoon Lieutenant Colonel Allison.

Contract W6369-19-X033/A ends 31 Jan 2020. I just wanted to check and make sure that everything is on track for ending the contract at the end of January. Please confirm and let me know if an extension is required. Thanks very much.

Best regards,

Sharon

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Procurement Officer, Director Services Contracting – D Svcs C
Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October 25, 2019 10:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Thank you very much Lieutenant Colonel Allison. I'll let her know.

Best regards,

Sharon

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Department of National Defence / Government of Canada
sharon.sally@forces.gc.ca / Tel: 819-939-8990

s.19(1)

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: October 25, 2019 9:48 AM
To: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>; Kapp R (Contractor)@ADM(PA) DGPASP@Ottawa-Hull <ROSANGELA.KAPP@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Hi Sharon, sorry I did not get back to you sooner.

I believe that we will need copies of all of the invoices for auditing purposes, so will have to submit them.

The invoices should be paid in Cdn funds

Rosangela Kapp, cc'ed here, can help with the payment issue.

From: Sally S@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-22-19 4:41 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033/A - Invoices

Good afternoon Lieutenant Colonel Allison,

the Contractor's Representative for contract W6369-19-X033/A has a couple of questions regarding the submission of invoices.

- 1) She mentions that, as stated in the contract, each invoice must be supported by "a copy of the invoices, receipts, vouchers for all direct expenses". She noted that she has many, many receipts for flights, hotels, training staff, food, live case study interviews, research venue hire, incentives for respondents etc. She'd like to know if they all have to be sent.
- 2) She would like to know if the invoice should list the total payable in Euros or in Canadian Funds.

If you like, you could provide me with the contact information for the person paying the invoices and I will sort this out with him or her. Thank you very much.

Best regards,

Sharon

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sharon.sally@forces.gc.ca / Tel: 819-939-8990

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 26, 2019 2:02 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>; Sally

S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: RE: W6369-19-X033/A - TAA

Holly,

Thank you so much for all of your assistance on this file. I couldn't have done it without your tremendous support.

Best of luck with your next endeavours.

Sharon,

Welcome aboard

Cheers.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-26-19 1:58 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Sally S@ADM(Mat) D Svcs C@Ottawa-Hull <SHARON.SALLY@forces.gc.ca>
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull <SHANNON.WINTLE@forces.gc.ca>
Subject: W6369-19-X033/A - TAA

Hello LCol Allison,

I just want to inform you that I will be leaving DND at the end of this week. I have just handed over this contract to my colleague, Sharon Sally. Moving forward, if you have any questions or concerns about this file, please contact Sharon.

It has been wonderful to work with you.

Kind Regards,

Holly Brousseau

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From: Allison LCol DE@ADM(PA), DPAPPO@Ottawa-Hull
Sent: May 13, 2020 10:55 AM
To: DeRito J@ADM(Mat), D.Svcs C@Ottawa-Hull
Subject: Status of RFP.

Hi Johanne, Can you give me an update on the status of this project.

Thx

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [Best.RL@ADM\(Mat\)_D_Svcs_C@Ottawa-Hull](mailto:Best.RL@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: May 20, 2020 8:00 AM
To: [Allison.LCol.DE@ADM\(PA\)_DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: W6369-21-X008 AAA training
Attachments: W6369-21-X008 Mandatory-Rated Technical Criteria.docx; W6369-21-X008 ANNEX A.DOCX; Accessible_Procurement.docx; W6369-21-X008 SRCL-LVERS.PDF

Good morning Sir,

I have recently been assigned subject requirement and have just completed reviewing the documentation you have provided.

Please find attached the revised SOW and Evaluation Criteria (for your review and comments), Accessibility form (for signature) and SRCL (for signature – Part D block 13).

Please don't hesitate to forward me any questions or concerns.

Thank you,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
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Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

Bidders are requested to include a narrative summary to aid in the evaluation process.

Mandatory Technical Criteria (MT)		
Number	Mandatory Technical Criteria (MT)	Bid Preparation Instructions
ACTOR AND AUDIENCE ANALYSIS TRAINING		
MT1	The Bidder must clearly demonstrate it has experience delivering a minimum of one (1) Actor and Audience Analysis (AAA) methodology course/workshop in a group setting where the main topic of the course/workshop was the AAA methodology.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
MT2	The Bidder must clearly demonstrate that it has the ability to deliver the course, all or in part, through a Distance Learning (DL) process.	The necessary documentation to support the bid in meeting this criterion must detail the bidder's ability to deliver the course through a DL process.
MT3	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching a minimum of one (1) Actor and Audience Analysis (AAA) methodology workshop/course.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
MT4	The Bidder must clearly demonstrate it has the capacity to: a) design a detailed curriculum and lecture/activity schedule for the course; b) conduct examinations / assessments / individual and syndicate presentations at the mid and end-course points; and c) provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students.	The necessary documentation to support the bid in meeting this criterion must include details from previous courses delivered or adequately describe of how they intend to meet the criterion.

Point-Rated Evaluation Criteria

For the purpose of personnel qualifications, experience gained through formal education will not be considered as experience. All requirements for experience must be obtained in a work environment as opposed to an educational setting. Co-op terms are considered experience provided that they are related to the required activities defined in each criterion.

Rated Technical Criteria (RT)				
#	Rated Requirements	Scoring Method	Max Score	Reference to Additional Substantiating Materials included in Bid
ACTOR AND AUDIENCE ANALYSIS TRAINING				
RT1	In addition to MT1, the bidder should clearly demonstrate it has experience delivering more than one (1) Actor and Audience Analysis (AAA) methodology course/workshop in a group setting where the main topic of course/workshop was the AAA methodology.	>1 to 3 courses = 10 points >3 to 5 courses = 20 points >5 courses = 30 points	30	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
RT2	In addition to MT3, the Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching more than one (1) Actor and Audience Analysis (AAA) methodology workshop/course.	>1 to 3 courses = 10 points >3 to 5 courses = 20 points >5 courses = 30 points	30	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
RT3	The Bidder should demonstrate that it has experience providing AAA methodology workshops/courses to NATO organizations and/or allies electronically the relevant information.	1 course delivered = 10 points >1 course delivered = 20 points	20	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
RT4	The Bidder should demonstrate that it has experience providing AAA methodology workshops/courses to a Military based audience.	>1 to 3 courses = 10 points >3 to 5 courses = 20 points >5 courses = 30 points	30	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
Maximum points available				110
Minimum points required				50

ANNEX A - STATEMENT OF WORK

1. TITLE

- 1.1 Actor and Audience Analysis; [b1]

2. BACKGROUND

- 2.1. Assistant Deputy Minister (Public Affairs) (ADM (PA)) is the functional authority for the Public Affairs Branch. ADM (PA) is responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS), Defence Policy and Canadian Armed Forces (CAF) Joint Doctrine. ADM (PA) has identified Actor and Audience Analysis (AAA) as a capability it requires to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.

3. LIST OF ACRONYMS AND ABBREVIATIONS

ADM (PA)	Assistant Deputy Minister (Public Affairs)
AAA	Actor and Audience Analysis
CDS	Chief of Defence Staff
CAF	Canadian Armed Forces
DND	Department of National Defence

4. OBJECTIVE

- 4.1. The Department of National Defence (DND) requires the services of a contractor to provide Actor and Audience Analysis (AAA) methodology training [b2] to a group of DND/CAF personnel. DND will retain proprietary usage of the AAA methodology and courseware in order to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable AAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

5. SCOPE

- 5.1 The Contractor must deliver AAA training [on an "as and when requested" [b3] basis, as identified in a Task Authorization.
- 5.2 The Contractor must provide DND/CAF with proprietary usage rights for the AAA methodology as well as the courseware in order to enable a sustained DND/CAF capability using the AAA methodology.

6. TASKS AND DELIVERABLES

- 6.1 The Contractor must deliver AAA training [which ends no later than 30 Nov, 2020 [b4] that will teach up to 24 students the methodology [to a level where they can apply the methodology [b5] to conduct Target Audience Analysis;
- 6.2. The Contractor must provide equipment for instruction (instructor computers and pointers), [excluding those already provided by the place of instruction; [b6]

- 6.3 The Contractor must provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for no less than 24 students;
 - 6.4 The Contractor must design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid-course and end-course points;
 - 6.5 Course material must be current and reflect any recent developments in AAA and Strategic Communication over the past calendar year;
 - 6.6 The Contractor must develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (focus groups) and quantitative public opinion research;
 - 6.7 The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
 - 6.8 The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- [Insert Do we want to add that the "live case study" must be approved by the Technical Authority? [b7]
- 6.9 The Contractor must consolidate the student findings from the live case study into a briefing document to be submitted to the Technical Authority no later than one month after the completion of training;
 - 6.10 The Contractor must design, conduct and assess written examinations, individual and syndicate presentations; and
 - 6.11 The Contractor must provide course certificates of completion to each student at the end of the course.

7. CONSTRAINTS

- 7.1 Provided that travel restrictions permit, a portion of the course must be conducted in the National Capital Region of Canada; [b8]
- 7.2 [The course must be conducted at a DND facility; [b9]
- 7.3 Training must be carried out during weekdays 07:00 – 16:00, with no weekend training;
- 7.4 Training must be carried out in English; and
- 7.5 [The course must involve a blend of distance learning, classroom lectures, syndicate work, student presentations and activities. [b10]

8. TECHNICAL ENVIRONMENT

- 8.1 The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) must be used.

9. REPORTING REQUIREMENTS

- 9.1 A progress report must be completed by the Contractor for [each resource [b11] and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;

- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

9.2 All reports must be submitted to the Technical Authority in one (1) hard copy and one (1) soft copy; and

9.3 Soft copy reports must be provided in an accessible format (Microsoft Word or an alternative format approved by the Technical Authority).

10. LANGUAGE REQUIREMENTS

10.1 The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

11. TRAVEL

11.1 Travel to the location of work will be the responsibility of the Contractor. Travel will not be reimbursed separately. As such, it is the responsibility of the Contractor to factor in any travel related costs when submitting their bid; and

11.2 The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction, including the live case study.

12. LOCATION OF WORK

12.1 All instruction must be completed at DND facilities within the National Capital Region (NCR). [b12]For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

Attestation of Consideration of Accessible Procurement

Accessibility must be considered for **all** procurement requirements. The Technical Authority (TA) / Requirement Owner (RO) must complete and sign this Attestation Form to confirm compliance. The Form must be kept in the procurement file.

Title or description of requirement:

W6369-21-X008 - Actor and Audience Analysis Training

Accessibility criteria is:

- X Included as part of technical specifications. (SOW 9.3)
Not applicable, e.g. fuel, lubricants, bandwidth. *(insert mandatory justification)*
Not included. *(insert mandatory justification)*

Justification as to why accessibility criteria is not applicable or not included.

TA / RO Signature

Date

Print: Name, Position



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat W6369-21-X008
Security Classification / Classification de sécurité UNCLASSIFIED

**SECURITY REQUIREMENTS CHECK LIST (SRCL)
 LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Department of National Defence		2. Branch or Directorate / Direction générale ou Direction ADM (PA)
3. a) Subcontract Number / Numéro du contrat de sous-traitance N/A	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant N/A	
4. Brief Description of Work / Brève description du travail The Department of National Defence (DND) requires the services of a contractor to provide Actor and Audience Analysis (AAA) Training to a group of DND/CAF personnel.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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 Gouvernement du Canada

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
 Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
 If Yes, indicate the level of sensitivity:
 Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
 Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
 Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMPLACEMENTS | | | |

Special comments:
 Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
 REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
 Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
 If Yes, will unscreened personnel be escorted?
 Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
 Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
 Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
 Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
 Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
 Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



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PART C - (continued) / PARTIE C - (suite)

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens Production																
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Government of Canada
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Contract Number / Numéro du contrat W6369-21-X008
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

Instructions for completion of a Security Requirements Check List (SRCL)

The instruction sheet should remain attached until Block #17 has been completed.

GENERAL - PROCESSING THIS FORM

The project authority shall arrange to complete this form.

The organization security officer shall review and approve the security requirements identified in the form, in cooperation with the project authority.

The contracting security authority is the organization responsible for ensuring that the suppliers are compliant with the security requirements identified in the SRCL.

All requisitions and subsequent tender / contractual documents including subcontracts that contain PROTECTED and/or CLASSIFIED requirements must be accompanied by a completed SRCL.

It is important to identify the level of PROTECTED information or assets as Level "A," "B" or "C," when applicable; however, certain types of information may only be identified as "PROTECTED". No information pertaining to a PROTECTED and/or CLASSIFIED government contract may be released by suppliers, without prior written approval of the individual identified in Block 17 of this form.

The classification assigned to a particular stage in the contractual process does not mean that everything applicable to that stage is to be given the same classification. Every item shall be PROTECTED and/or CLASSIFIED according to its own content. If a supplier is in doubt as to the actual level to be assigned, they should consult with the individual identified in Block 17 of this form.

PART A - CONTRACT INFORMATION

Contract Number (top of the form)

This number must be the same as that found on the requisition and should be the one used when issuing an RFP or contract. This is a unique number (i.e. no two requirements will have the same number). A new SRCL must be used for each new requirement or requisition (e.g. new contract number, new SRCL, new signatures).

1. **Originating Government Department or Organization**

Enter the department or client organization name or the prime contractor name for which the work is being performed.

2. **Directorate / Branch**

This block is used to further identify the area within the department or organization for which the work will be conducted.

3. **a) Subcontract Number**

If applicable, this number corresponds to the number generated by the Prime Contractor to manage the work with its subcontractor.

b) Name and Address of Subcontractor

Indicate the full name and address of the Subcontractor if applicable.

4. **Brief Description of Work**

Provide a brief explanation of the nature of the requirement or work to be performed.

5. **a) Will the supplier require access to Controlled Goods?**

*The Defence Production Act (DPA) defines "Controlled Goods" as certain goods listed in the Export Control List, a regulation made pursuant to the *Export and Import Permits Act* (EIPA). Suppliers who examine, possess, or transfer Controlled Goods within Canada must register in the Controlled Goods Directorate or be exempt from registration. More information may be found at www.cgd.gc.ca.*

b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations?

The prime contractor and any subcontractors must be certified under the U.S./Canada Joint Certification Program if the work involves access to unclassified military data subject to the provisions of the Technical Data Control Regulations. More information may be found at www.dlis.dla.mil/jcp.

6. **Indicate the type of access required**

Identify the nature of the work to be performed for this requirement. The user is to select one of the following types:

a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets?

The supplier would select this option if they require access to PROTECTED and/or CLASSIFIED information or assets to perform the duties of the requirement.

b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted.

The supplier would select this option if they require regular access to government premises or a secure work site only. The supplier will not have access to PROTECTED and/or CLASSIFIED information or assets under this option.

c) Is this a commercial courier or delivery requirement with no overnight storage?

The supplier would select this option if there is a commercial courier or delivery requirement. The supplier will not be allowed to keep a package overnight. The package must be returned if it cannot be delivered.

7. Type of information / Release restrictions / Level of information

Identify the type(s) of information that the supplier may require access to, list any possible release restrictions, and if applicable, provide the level(s) of the information. The user can make multiple selections based on the nature of the work to be performed.

Departments must process SRCLs through PWGSC where:

- contracts that afford access to PROTECTED and/or CLASSIFIED foreign government information and assets;
- contracts that afford foreign contractors access to PROTECTED and/or CLASSIFIED Canadian government information and assets; or
- contracts that afford foreign or Canadian contractors access to PROTECTED and/or CLASSIFIED information and assets as defined in the documents entitled Identifying INFOSEC and INFOSEC Release.

a) Indicate the type of information that the supplier will be required to access

Canadian government information and/or assets

If Canadian information and/or assets are identified, the supplier will have access to PROTECTED and/or CLASSIFIED information and/or assets that are owned by the Canadian government.

NATO Information and/or assets

If NATO information and/or assets are identified, this indicates that as part of this requirement, the supplier will have access to PROTECTED and/or CLASSIFIED information and/or assets that are owned by NATO governments. NATO information and/or assets are developed and/or owned by NATO countries and are not to be divulged to any country that is not a NATO member nation. Persons dealing with NATO information and/or assets must hold a NATO security clearance and have the required need-to-know.

Requirements involving CLASSIFIED NATO information must be awarded by PWGSC. PWGSC / CIISD is the Designated Security Authority for industrial security matters in Canada.

Foreign government information and/or assets

If foreign information and/or assets are identified, this requirement will allow access to information and/or assets owned by a country other than Canada.

b) Release restrictions

If **Not Releasable** is selected, this indicates that the information and/or assets are for **Canadian Eyes Only (CEO)**. Only Canadian suppliers based in Canada can bid on this type of requirement. NOTE: If Canadian information and/or assets coexists with CEO information and/or assets, the CEO information and/or assets must be stamped **Canadian Eyes Only (CEO)**.

If **No Release Restrictions** is selected, this indicates that access to the information and/or assets are not subject to any restrictions.

If **ALL NATO countries** is selected, bidders for this requirement must be from NATO member countries only.

NOTE: There may be multiple release restrictions associated with a requirement depending on the nature of the work to be performed. In these instances, a security guide should be added to the SRCL clarifying these restrictions. The security guide is normally generated by the organization's project authority and/or security authority.

c) Level of information

Using the following chart, indicate the appropriate level of access to information/assets the supplier must have to perform the duties of the requirement.

PROTECTED	CLASSIFIED	NATO
PROTECTED A	CONFIDENTIAL	NATO UNCLASSIFIED
PROTECTED B	SECRET	NATO RESTRICTED
PROTECTED C	TOP SECRET	NATO CONFIDENTIAL
	TOP SECRET (SIGINT)	NATO SECRET
		COSMIC TOP SECRET

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
 If Yes, the supplier personnel requiring access to COMSEC information or assets must receive a COMSEC briefing. The briefing will be given to the "holder" of the COMSEC information or assets. In the case of a "personnel assigned" type of contract, the customer department will give the briefing. When the supplier is required to receive and store COMSEC information or assets on the supplier's premises, the supplier's COMSEC Custodian will give the COMSEC briefings to the employees requiring access to COMSEC information or assets. If Yes, the Level of sensitivity must be indicated.
9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
 If Yes, the supplier must provide the Short Title of the material and the Document Number. Access to extremely sensitive INFOSEC information or assets will require that the supplier undergo a Foreign Ownership Control or Influence (FOCI) evaluation by CIISD.

PART B - PERSONNEL (SUPPLIER)

10. a) Personnel security screening level required

Identify the screening level required for access to the information/assets or client facility. More than one level may be identified depending on the nature of the work. Please note that Site Access screenings are granted for access to specific sites under prior arrangement with the Treasury Board of Canada Secretariat. A Site Access screening only applies to individuals, and it is not linked to any other screening level that may be granted to individuals or organizations.

RELIABILITY STATUS	CONFIDENTIAL	SECRET
TOP SECRET	TOP SECRET (SIGINT)	NATO CONFIDENTIAL
NATO SECRET	COSMIC TOP SECRET	SITE ACCESS

If multiple levels of screening are identified, a Security Classification Guide must be provided.

b) May unscreened personnel be used for portions of the work?

Indicating Yes means that portions of the work are not PROTECTED and/or CLASSIFIED and may be performed outside a secure environment by unscreened personnel. The following question must be answered if unscreened personnel will be used:

Will unscreened personnel be escorted?

If No, unscreened personnel may not be allowed access to sensitive work sites and must not have access to PROTECTED and/or CLASSIFIED information and/or assets.

If Yes, unscreened personnel must be escorted by an individual who is cleared to the required level of security in order to ensure there will be no access to PROTECTED and/or CLASSIFIED information and/or assets at the work site.

PART C - SAFEGUARDS (SUPPLIER)

11. INFORMATION / ASSETS

a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information and/or assets on its site or premises?

If Yes, specify the security level of the documents and/or equipment that the supplier will be required to safeguard at their own site or premises using the summary chart.

b) Will the supplier be required to safeguard COMSEC information or assets?

If Yes, specify the security level of COMSEC information or assets that the supplier will be required to safeguard at their own site or premises using the summary chart.

PRODUCTION

c) Will the production (manufacture, repair and/or modification) of PROTECTED and/or CLASSIFIED material and/or equipment occur at the supplier's site or premises?

Using the summary chart, specify the security level of material and/or equipment that the supplier manufactured, repaired and/or modified and will be required to safeguard at their own site or premises.

INFORMATION TECHNOLOGY (IT)

d) Will the supplier be required to use its IT systems to electronically process and/or produce or store PROTECTED and/or CLASSIFIED information and/or data?

If Yes, specify the security level in the summary chart. This block details the information and/or data that will be electronically processed or produced and stored on a computer system. The client department and/or organization will be required to specify the IT security requirements for this procurement in a separate technical document. The supplier must also direct their attention to the following document: Treasury Board of Canada Secretariat - Operational Security Standard: Management of Information Technology Security (MITS).

e) Will there be an electronic link between the supplier's IT systems and the government department or agency?

If Yes, the supplier must have their IT system(s) approved. The Client Department must also provide the Connectivity Criteria detailing the conditions and the level of access for the electronic link (usually not higher than PROTECTED B level).

SUMMARY CHART

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

For users completing the form online (via the Internet), the Summary Chart is automatically populated by your responses to previous questions.

PROTECTED	CLASSIFIED	NATO	COMSEC
PROTECTED A	CONFIDENTIAL	NATO RESTRICTED	PROTECTED A
PROTECTED B	SECRET	NATO CONFIDENTIAL	PROTECTED B
PROTECTED C	TOP SECRET	NATO SECRET	PROTECTED C
	TOP SECRET (SIGINT)	COSMIC TOP SECRET	CONFIDENTIAL
			SECRET
			TOP SECRET

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

PART D - AUTHORIZATION

13. Organization Project Authority

This block is to be completed and signed by the appropriate project authority within the client department or organization (e.g. the person responsible for this project or the person who has knowledge of the requirement at the client department or organization). This person may on occasion be contacted to clarify information on the form.

14. Organization Security Authority

This block is to be signed by the Departmental Security Officer (DSO) (or delegate) of the department identified in Block 1, or the security official of the prime contractor.

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

A Security Guide or Security Classification Guide is used in conjunction with the SRCL to identify additional security requirements which do not appear in the SRCL, and/or to offer clarification to specific areas of the SRCL.

16. Procurement Officer

This block is to be signed by the procurement officer acting as the contract or subcontract manager.

17. Contracting Security Authority

This block is to be signed by the Contract Security Official. Where PWGSC is the Contract Security Authority, Canadian and International Industrial Security Directorate (CIISD) will complete this block.

Instructions pour établir la Liste de vérification des exigences relatives à la sécurité (LVERS)

La feuille d'instructions devrait rester jointe au formulaire jusqu'à ce que la case 17 ait été remplie.

GÉNÉRALITÉS - TRAITEMENT DU PRÉSENT FORMULAIRE

Le responsable du projet doit faire remplir ce formulaire.

L'agent de sécurité de l'organisation doit revoir et approuver les exigences de sécurité qui figurent dans le formulaire, en collaboration avec le responsable du projet.

Le responsable de la sécurité des marchés est le responsable chargé de voir à ce que les fournisseurs se conforment aux exigences de sécurité mentionnées dans la LVERS.

Toutes les demandes d'achat ainsi que tous les appels d'offres et les documents contractuels subséquents, y compris les contrats de sous-traitance, qui comprennent des exigences relatives à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS doivent être accompagnés d'une LVERS dûment remplie.

Il importe d'indiquer si les renseignements ou les biens PROTÉGÉS sont de niveau A, B ou C, le cas échéant; cependant, certains types de renseignements peuvent être indiqués par la mention « PROTÉGÉ » seulement. Aucun renseignement relatif à un contrat gouvernemental PROTÉGÉ ou CLASSIFIÉ ne peut être divulgué par les fournisseurs sans l'approbation écrite préalable de la personne dont le nom figure à la case 17 de ce formulaire.

La classification assignée à un stade particulier du processus contractuel ne signifie pas que tout ce qui se rapporte à ce stade doit recevoir la même classification. Chaque article doit être PROTÉGÉ et/ou CLASSIFIÉ selon sa propre nature. Si un fournisseur ne sait pas quel niveau de classification assigner, il doit consulter la personne dont le nom figure à la case 17 de ce formulaire.

PARTIE A - INFORMATION CONTRACTUELLE

Numéro du contrat (au haut du formulaire)

Ce numéro doit être le même que celui utilisé sur la demande d'achat et services et devrait être celui utilisé dans la DDP ou dans le contrat. Il s'agit d'un numéro unique (c.-à-d. que le même numéro ne sera pas attribué à deux besoins distincts). Une nouvelle LVERS doit être utilisée pour chaque nouveau besoin ou demande (p. ex. un nouveau numéro de contrat, une nouvelle LVERS, de nouvelles signatures).

1. **Ministère ou organisme gouvernemental d'origine**
Inscrire le nom du ministère ou de l'organisme client ou le nom de l'entrepreneur principal pour qui les travaux sont effectués.
2. **Direction générale ou Direction**
Cette case peut servir à fournir plus de détails quant à la section du ministère ou de l'organisme pour qui les travaux sont effectués.
3. **a) Numéro du contrat de sous-traitance**
S'il y a lieu, ce numéro correspond au numéro généré par l'entrepreneur principal pour gérer le travail avec son sous-traitant.
b) Nom et adresse du sous-traitant
Indiquer le nom et l'adresse au complet du sous-traitant, s'il y a lieu.
4. **Brève description du travail**
Donner un bref aperçu du besoin ou du travail à exécuter.
5. **a) Le fournisseur aura-t-il accès à des marchandises contrôlées?**
La *Loi sur la production de défense* (LPD) définit « marchandises contrôlées » comme désignant certains biens énumérés dans la Liste des marchandises d'exportation contrôlée, un règlement établi en vertu de la *Loi sur les licences d'exportation et d'importation* (LLEI). Les fournisseurs qui examinent, possèdent ou transfèrent des marchandises contrôlées à l'intérieur du Canada doivent s'inscrire à la Direction des marchandises contrôlées ou être exemptés de l'inscription. On trouvera plus d'information à l'adresse www.cgp.gc.ca.
b) Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?
L'entrepreneur et tout sous-traitant doivent être accrédités en vertu du Programme mixte d'accréditation États-Unis / Canada si le travail comporte l'accès à des données militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques. On trouvera plus d'information à l'adresse www.dlis.dla.mil/jcp/.

6. Indiquer le type d'accès requis

Indiquer la nature du travail à exécuter pour répondre à ce besoin. L'utilisateur doit choisir un des types suivants :

a) Le fournisseur et ses employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS?

Le fournisseur choisit cette option s'il doit avoir accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS pour accomplir le travail requis.

b) Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.

Le fournisseur choisit cette option seulement s'il doit avoir accès régulièrement aux locaux du gouvernement ou à un lieu de travail protégé. Le fournisseur n'aura pas accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS en vertu de cette option.

c) S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?

Le fournisseur choisit cette option s'il y a nécessité de recourir à un service de messagerie ou de livraison commerciale. Le fournisseur ne sera pas autorisé à garder un colis pendant la nuit. Le colis doit être retourné s'il ne peut pas être livré.

7. Type d'information / Restrictions relatives à la diffusion / Niveau d'information

Indiquer le ou les types d'information auxquels le fournisseur peut devoir avoir accès, énumérer toutes les restrictions possibles relatives à la diffusion, et, s'il y a lieu, indiquer le ou les niveaux d'information. L'utilisateur peut faire plusieurs choix selon la nature du travail à exécuter.

Les ministères doivent soumettre la LVERS à TPSGC lorsque:

- les marchés prévoient l'accès aux renseignements et aux biens de nature PROTÉGÉS et/ou CLASSIFIÉS étrangers ;
- les marchés prévoient aux entrepreneurs étrangers l'accès aux renseignements et aux biens de nature PROTÉGÉS et/ou CLASSIFIÉS canadiens; ou
- les marchés prévoient aux entrepreneurs étrangers ou canadiens l'accès aux renseignements et aux biens de nature PROTÉGÉS et/ou CLASSIFIÉS tels que définis dans les documents intitulés Moyens INFOSEC détermination et Divulgaration de INFOSEC.

a) Indiquer le type d'information auquel le fournisseur devra avoir accès

Renseignements et/ou biens du gouvernement canadien

Si des renseignements et/ou des biens canadiens sont indiqués, le fournisseur aura accès à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS appartenant au gouvernement canadien.

Renseignements et/ou biens de l'OTAN

Si des renseignements et/ou des biens de l'OTAN sont indiqués, cela signifie que, dans le cadre de ce besoin, le fournisseur aura accès à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS appartenant à des gouvernements membres de l'OTAN. Les renseignements et/ou les biens de l'OTAN sont élaborés par des pays de l'OTAN ou leur appartiennent et ne doivent être divulgués à aucun pays qui n'est pas un pays membre de l'OTAN. Les personnes qui manient des renseignements et/ou des biens de l'OTAN doivent détenir une autorisation de sécurité de l'OTAN et avoir besoin de savoir.

Les contrats comportant des renseignements CLASSIFIÉS de l'OTAN doivent être attribués par TPSGC. La DSICI de TPSGC est le responsable de la sécurité désigné relativement aux questions de sécurité industrielle au Canada.

Renseignements et/ou biens de gouvernements étrangers

Si des renseignements et/ou des biens de gouvernements étrangers sont indiqués, ce besoin permettra l'accès à des renseignements et/ou à des biens appartenant à un pays autre que le Canada.

b) Restrictions relatives à la diffusion

Si **À ne pas diffuser** est choisi, cela indique que les renseignements et/ou les biens sont réservés aux Canadiens. Seuls des fournisseurs canadiens installés au Canada peuvent soumissionner ce genre de besoin. **NOTA** : Si des renseignements et/ou des biens du gouvernement canadien coexistent avec des renseignements et/ou des biens réservés aux Canadiens, ceux-ci doivent porter la mention **Réservé aux Canadiens**.

Si **Aucune restriction relative à la diffusion** est choisi, cela indique que l'accès aux renseignements et/ou aux biens n'est assujéti à aucune restriction.

Si Tous les pays de l'OTAN est choisi, les soumissionnaires doivent appartenir à un pays membre de l'OTAN.

NOTA : Il peut y avoir plus d'une restriction s'appliquant à une demande, selon la nature des travaux à exécuter. Pour ce genre de contrat, un guide de sécurité doit être joint à la LVERS afin de clarifier les restrictions. Ce guide est généralement préparé par le chargé de projet et/ou le responsable de la sécurité de l'organisme.

c) Niveau d'information

À l'aide du tableau ci-dessous, indiquer le niveau approprié d'accès aux renseignements et/ou aux biens que le fournisseur doit avoir pour accomplir les travaux requis.

PROTÉGÉ	CLASSIFIÉ	NATO
PROTÉGÉ A	CONFIDENTIEL	NATO NON CLASSIFIÉ
PROTÉGÉ B	SECRET	NATO DIFFUSION RESTREINTE
PROTÉGÉ C	TRÈS SECRET	NATO CONFIDENTIEL
	TRÈS SECRET (SIGINT)	NATO SECRET
		COSMIC TRÈS SECRET

8. **Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?**
 Si la réponse est Oui, les membres du personnel du fournisseur qui doivent avoir accès à des renseignements ou à des biens COMSEC doivent participer à une séance d'information COMSEC. Cette séance sera donnée au « détenteur autorisé » des renseignements ou des biens COMSEC. Dans le cas des contrats du type « personnel affecté », cette séance sera donnée par le ministère client. Lorsque le fournisseur doit recevoir et conserver, dans ses locaux, des renseignements ou des biens COMSEC, le responsable de la garde des renseignements ou des biens COMSEC de l'entreprise donnera la séance d'information COMSEC aux membres du personnel qui doivent avoir accès à des renseignements ou à des biens COMSEC.
9. **Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?**
 Si la réponse est Oui, le fournisseur doit indiquer le titre abrégé du document, le numéro du document et le niveau de sensibilité. L'accès à des renseignements ou à des biens extrêmement délicats INFOSEC exigera que le fournisseur fasse l'objet d'une vérification Participation, contrôle et influence étrangers (PCIE) effectuée par la DSIC1.

PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Niveau de contrôle de la sécurité du personnel requis

Indiquer le niveau d'autorisation de sécurité que le personnel doit détenir pour avoir accès aux renseignements, aux biens ou au site du client. Selon la nature du travail, il peut y avoir plus d'un niveau de sécurité. Veuillez noter que des cotes de sécurité sont accordées pour l'accès à des sites particuliers, selon des dispositions antérieures prises auprès du Secrétariat du Conseil du Trésor du Canada. La cote de sécurité donnant accès à un site s'applique uniquement aux personnes et n'est liée à aucune autre autorisation de sécurité accordée à des personnes ou à des organismes.

COTE DE FIABILITÉ	CONFIDENTIEL	SECRET
TRÈS SECRET	TRÈS SECRET (SIGINT)	NATO CONFIDENTIEL
NATO SECRET	COSMIC TRÈS SECRET	ACCÈS AUX EMPLACEMENTS

Si plusieurs niveaux d'autorisation de sécurité sont indiqués, un guide de classification de sécurité doit être fourni.

b) Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?

Si la réponse est Oui, cela veut dire que certaines tâches ne sont pas PROTÉGÉES et/ou CLASSIFIÉES et peuvent être exécutées à l'extérieur d'un environnement sécurisé par du personnel n'ayant pas d'autorisation de sécurité. Il faut répondre à la question suivante si l'on a recours à du personnel n'ayant pas d'autorisation de sécurité :

Le personnel n'ayant pas d'autorisation de sécurité sera-t-il escorté?

Si la réponse est Non, le personnel n'ayant pas d'autorisation de sécurité ne pourra pas avoir accès à des lieux de travail dont l'accès est réglementé ni à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS.

Si la réponse est Oui, le personnel n'ayant pas d'autorisation de sécurité devra être escorté par une personne détenant la cote de sécurité requise, pour faire en sorte que le personnel en question n'ait pas accès à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS sur les lieux de travail.

PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

11. RENSEIGNEMENTS / BIENS :

a) Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

Si la réponse est Oui, préciser, à l'aide du tableau récapitulatif, le niveau de sécurité des documents ou de l'équipement que le fournisseur devra protéger dans ses installations.

b) Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

Si la réponse est Oui, préciser, à l'aide du tableau récapitulatif, le niveau de sécurité des renseignements ou des biens COMSEC que le fournisseur devra protéger dans ses installations.

PRODUCTION

c) Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

Préciser, à l'aide du tableau récapitulatif, le niveau de sécurité du matériel que le fournisseur fabriquera, réparera et/ou modifiera et devra protéger dans ses installations.

TECHNOLOGIE DE L'INFORMATION (TI)

d) Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

Si la réponse est Oui, préciser le niveau de sécurité à l'aide du tableau récapitulatif. Cette case porte sur les renseignements qui seront traités ou produits électroniquement et stockés dans un système informatique. Le ministère/organisme client devra préciser les exigences en matière de sécurité de la TI relativement à cet achat dans un document technique distinct. Le fournisseur devra également consulter le document suivant : Secrétariat du Conseil du Trésor du Canada – Norme opérationnelle de sécurité : Gestion de la sécurité des technologies de l'information (GSTI).

e) Y aura-t-il un lien électronique entre les systèmes informatiques du fournisseur et celui du ministère ou de l'agence gouvernementale?

Si la réponse est Oui, le fournisseur doit faire approuver ses systèmes informatiques. Le ministère client doit aussi fournir les critères de connectivité qui décrivent en détail les conditions et le niveau de sécurité relativement au lien électronique (habituellement pas plus haut que le niveau PROTÉGÉ B).

TABLEAU RÉCAPITULATIF

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

PROTÉGÉ	CLASSIFIÉ	NATO	COMSEC
PROTÉGÉ A	CONFIDENTIEL	NATO DIFFUSION RESTREINTE	PROTÉGÉ A
PROTÉGÉ B	SECRET	NATO CONFIDENTIEL	PROTÉGÉ B
PROTÉGÉ C	TRÈS SECRET	NATO SECRET	PROTÉGÉ C
	TRÈS SECRET (SIGINT)	COSMIC TRÈS SECRET	CONFIDENTIEL
			SECRET
			TRÈS SECRET

12. a) La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

Si la réponse est Oui, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de

sécurité » au haut et au bas du formulaire.

b) La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

Si la réponse est Oui, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

PARTIE D - AUTORISATION

13. Chargé de projet de l'organisme

Cette case doit être remplie et signée par le chargé de projet pertinent (c.-à-d. la personne qui est responsable de ce projet ou qui connaît le besoin au ministère ou à l'organisme client. On peut, à l'occasion, communiquer avec cette personne pour clarifier des renseignements figurant sur le formulaire.

14. Responsable de la sécurité de l'organisme

Cette case doit être signée par l'agent de la sécurité du ministère (ASM) du ministère indiqué à la case 1 ou par son remplaçant ou par le responsable de la sécurité du fournisseur.

15. Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

Un Guide de sécurité ou un Guide de classification de sécurité sont utilisés de concert avec la LVERS pour faire part d'exigences supplémentaires en matière de sécurité qui n'apparaissent pas dans la LVERS et/ou pour éclaircir certaines parties de la LVERS.

16. Agent d'approvisionnement

Cette case doit être signée par l'agent des achats qui fait fonction de gestionnaire du contrat ou du contrat de sous-traitance.

17. Autorité contractante en matière de sécurité

Cette case doit être signée par l'agent de la sécurité du marché. Lorsque TPSGC est le responsable de la sécurité du marché, la Direction de la sécurité industrielle canadienne et internationale (DSICI) doit remplir cette case.

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 20, 2020 5:03 PM
To: [Best RL@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Re: W6369-21-X008 AAA training

Hi Rob, thanks for this.

We were not required to do a SRCL for the previous RFP.

For the attestation of accessible Procurement, is there a template? Not sure what this is for.

Have responded to questions in SOW

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [Best RL@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: Wednesday, May 20, 2020 8:00 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: W6369-21-X008 AAA training

Good morning Sir,

I have recently been assigned subject requirement and have just completed reviewing the documentation you have provided.

Please find attached the revised SOW and Evaluation Criteria (for your review and comments), Accessibility form (for signature) and SRCL (for signature – Part D block 13).

Please don't hesitate to forward me any questions or concerns.

Thank you,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

s.19(1)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 22, 2020 12:26 PM
To: [Best RL@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Fw: AAA trg
Attachments: AllisonScan1.pdf; AllisonScan2.pdf; W6369-21-X008 ANNEX A[5126]
Allison comments.docx

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Doug Allison <
Sent: Friday, May 22, 2020 12:20 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA trg

Rob, Attached are two signed docs and some comments to your comments. Appreciate your help. Thx. Plse advise if you need anything else.

Sent from [Mail](#) for Windows 10



Government of Canada
 Gouvernement du Canada

Contract Number / Numéro du contrat W6369-21-X008
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Douglas Allison	ADM(PA) DGMSC FD	D. Allison LCOI	
Telephone No. - N° de téléphone 613-901-4697	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel Douglas.Allison@forces.gc.ca	Date 22/05/2020
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

Attestation of Consideration of Accessible Procurement

Accessibility must be considered for all procurement requirements. The Technical Authority (TA) / Requirement Owner (RO) must complete and sign this Attestation Form to confirm compliance. The Form must be kept in the procurement file.

Title or description of requirement:

W6369-21-X008 - Actor and Audience Analysis Training

Accessibility criteria is:

- X Included as part of technical specifications. (SOW 9.3)
Not applicable, e.g. fuel, lubricants, bandwidth. *(insert mandatory justification)*
Not included. *(insert mandatory justification)*

Justification as to why accessibility criteria is not applicable or not included.

D. Allison LCol

TA / RO Signature

22/05/2020

Date

D. Allison ADM(PA) DGMSC FD

Print: Name, Position

ANNEX A - STATEMENT OF WORK

1. TITLE

1.1 Actor and Audience Analysis. [b1][DA2]

2. BACKGROUND

2.1. Assistant Deputy Minister (Public Affairs) (ADM (PA)) is the functional authority for the Public Affairs Branch. ADM (PA) is responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS), Defence Policy and Canadian Armed Forces (CAF) Joint Doctrine. ADM (PA) has identified Actor and Audience Analysis (AAA) as a capability it requires to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.

3. LIST OF ACRONYMS AND ABBREVIATIONS

ADM (PA)	Assistant Deputy Minister (Public Affairs)
AAA	Actor and Audience Analysis
CDS	Chief of Defence Staff
CAF	Canadian Armed Forces
DND	Department of National Defence

4. OBJECTIVE

4.1. The Department of National Defence (DND) requires the services of a contractor to provide Actor and Audience Analysis (AAA) methodology training [b3][DA4] to a group of DND/CAF personnel. DND will retain proprietary usage of the AAA methodology and courseware in order to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable AAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

5. SCOPE

5.1 The Contractor must deliver AAA training on an "as and when requested" [b5][DA6] basis, as identified in a Task Authorization.

5.2 The Contractor must provide DND/CAF with proprietary usage rights for the AAA methodology as well as the courseware in order to enable a sustained DND/CAF capability using the AAA methodology.

6. TASKS AND DELIVERABLES

6.1 The Contractor must deliver AAA training which ends no later than 30 Nov, 2020 [b7][DA8] that will teach up to 24 students the methodology to a level where they can apply the methodology [b9][DA10] to conduct Target Audience Analysis;

6.2 The Contractor must provide equipment for instruction (instructor computers and pointers), excluding those already provided by the place of instruction; [b11][DA12]

- 6.3 The Contractor must provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for no less than 24 students;
- 6.4 The Contractor must design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid-course and end-course points;
- 6.5 Course material must be current and reflect any recent developments in AAA and Strategic Communication over the past calendar year;
- 6.6 The Contractor must develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (focus groups) and quantitative public opinion research;
- 6.7 The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
- 6.8 The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;

Insert Do we want to add that the "live case study" must be approved by the Technical Authority? [b13][DA14]

- 6.9 The Contractor must consolidate the student findings from the live case study into a briefing document to be submitted to the Technical Authority no later than one month after the completion of training;
- 6.10 The Contractor must design, conduct and assess written examinations, individual and syndicate presentations; and
- 6.11 The Contractor must provide course certificates of completion to each student at the end of the course.

7. CONSTRAINTS

- 7.1 Provided that travel restrictions permit, a portion of the course must be conducted in the National Capital Region of Canada; [b15][DA16]
- 7.2 The course must be conducted at a DND facility; [b17][DA18]
- 7.3 Training must be carried out during weekdays 07:00 – 16:00, with no weekend training;
- 7.4 Training must be carried out in English; and
- 7.5 The course must involve a blend of distance learning, classroom lectures, syndicate work, student presentations and activities. [b19][DA20]

8. TECHNICAL ENVIRONMENT

- 8.1 The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) must be used.

9. REPORTING REQUIREMENTS

- 9.1 A progress report must be completed by the Contractor for each resource [b21][DA22] and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;

- (b) Status of any outstanding activities that may extend beyond normal timelines;
 - (c) Any training concerns regarding student performance;
 - (d) Any student concerns regarding course material or delivery;
 - (e) Description of any problems encountered which will require attention or escalation; and
 - (f) Any recommendations to update or change the course schedule.
- 9.2 All reports must be submitted to the Technical Authority in one (1) hard copy and one (1) soft copy; and
- 9.3 Soft copy reports must be provided in an accessible format (Microsoft Word or an alternative format approved by the Technical Authority).
- 10. LANGUAGE REQUIREMENTS**
- 10.1 The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.
- 11. TRAVEL**
- 11.1 Travel to the location of work will be the responsibility of the Contractor. Travel will not be reimbursed separately. As such, it is the responsibility of the Contractor to factor in any travel related costs when submitting their bid; and
- 11.2 The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction, including the live case study.
- 12. LOCATION OF WORK**
- 12.1 All instruction must be completed at DND facilities within the National Capital Region (NCR). [b23][DA24]For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: May 26, 2020 7:02 PM
To: Keirstead Maj DJ@ADM(PA) DPAP0@Ottawa-Hull
Subject: Re: AAAA SL revision

Doug, another outstanding assessment by Suzy. As they said in Seinfeld" this is gold, Jerry, gold.

A minor point, we had 20, not 30 students on the AAA Course.

We need to consider a means to recognize Suzy individually, and ADM(SandT) as a group for how much they have contributed in a very short time. Stellar work.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Keirstead Maj DJ@ADM(PA) DPAP0@Ottawa-Hull
Sent: Tuesday, May 26, 2020 6:09 PM
To: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull
Cc: Janzen BGen JH@ADM(PA) DPAP0@Ottawa-Hull; Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull; Hurov LT(N) CN@ADM(PA) DGPA@Ottawa-Hull; Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull; Morin Capt MVA@ADM(PA) DGPA@Ottawa-Hull; Neron MWO JF@ADM(PA) DGPA@Ottawa-Hull; Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: FW: AAAA SL revision

Suzy,

Thank you very much for this. I have reviewed and I think that these additions meet well with the General's intent. Plse move forward.

Cheers,
Doug

From: Waldman, Suzanne [mailto:Suzanne.Waldman@drdc-rddc.gc.ca]
Sent: May 26, 2020 3:02 PM
To: Keirstead Maj DJ@ADM(PA) DPAP0@Ottawa-Hull <Doug.Keirstead@forces.gc.ca>
Cc: Waldman SM@ADM(S&T) DRDC CORA@Ottawa-Hull <SUZANNE.WALDMAN@forces.gc.ca>
Subject: AAAA SL revision

Hi Doug,

I finally got back to the AAAA SL.

I added a few paragraphs in keeping with your thoughts in the Discussion of Results Section, see below and/or attached.

I hope you like this approach. It occurred to me that the "situational" approach to privacy (i.e., privacy-related practices need to be attuned to the reasonable expectations people have for privacy in given situations) could perhaps be fertile for thinking about ethical StratCom methods. I will look more into this...

--Suzy

Notably, the Public Environment Analysis produced by the AAAA process for StratCom uses had different features than an intelligence-focussed PMESII, which stands for a Political-Military-Economic-Social Information -Infrastructure report and is also developed using open sources, typically to provide a baseline threat assessment in advance of a military operation or movement. According to a discussion with OSINT specialist Janelle McInnis--also of DRDC CORA's Joint Targeting Section--the PEA developed through the AAAA process was capable of obtaining a more finely-grained focus on the cultural and social features of smaller communities than the PMESII, which tends to remain at the level of country- or culture-level characteristics.

Another difference of the AAAA process from an intelligence-focussed OSINT process undertaken by military intelligence analysts is that sensitivities must be respected around what types of sources are used for informing Public Affairs-related products and activities, particularly among domestic audiences. For example, according to principles of "situational privacy," all sources consulted must be publicly accessible ones where it is reasonable for participants to expect their contributions will be read by non-participants [5]. Additionally, features of groups must be described in a respectful and sensitive way in the event that PEA's--which are likely to be unclassified--come to be disclosed.

In situations where community-based discourse about issues is less accessible, or if the use of foreign languages or other barriers in domestic or non-domestic situations do not easily avail monitoring of social media discussions, alternative strategies for researching and understanding audiences may have to be used or even developed [6].

[5] P. E. Masur, *Situational Privacy and Self-Disclosure: Communication Processes in Online Environments*, New York, NY: Springer, 2019.

[6] Forrester, B., Waldman, S., and Ghajar-Khosravi, S., "Social Media Baseline," Defence Research and Development Canada (Pre-release), Ottawa, 2020.

s.19(1)

From: [Best.RL@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: June 1, 2020 2:26 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: AAA trg
Attachments: W6369-21-X008 ANNEX A final draft.docx

Good afternoon Sir,

Please find attached the amended SOW. I would like to confirm the following are correct:

- 7.1 The course must be conducted in the National Capital Region of Canada;
- 12.1 All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

I would also like to confirm the delivery end date for the course. I currently have it listed as 30 Nov 2021. Is this the latest the course can be completed?

The solicitation package is ready for submission for approval pending any changes based on the questions above.

Thank you,

Rob

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: May 22, 2020 12:26 PM
To: Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Fw: AAA trg

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Doug Allison <
Sent: Friday, May 22, 2020 12:20 PM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Subject: AAA trg

Rob, Attached are two signed docs and some comments to your comments. Appreciate your help. Thx. Plse advise if you need anything else.

Sent from [Mail](#) for Windows 10

ANNEX A - STATEMENT OF WORK

1. TITLE

- 1.1 Actor and Audience Analysis training.

2. BACKGROUND

- 2.1. Assistant Deputy Minister (Public Affairs) (ADM (PA)) is the functional authority for the Public Affairs Branch. ADM (PA) is responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS), Defence Policy and Canadian Armed Forces (CAF) Joint Doctrine. ADM (PA) has identified Actor and Audience Analysis (AAA) as a capability it requires to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.

3. LIST OF ACRONYMS AND ABBREVIATIONS

ADM (PA)	Assistant Deputy Minister (Public Affairs)
AAA	Actor and Audience Analysis
CDS	Chief of Defence Staff
CAF	Canadian Armed Forces
DND	Department of National Defence

4. OBJECTIVE

- 4.1. The Department of National Defence (DND) requires the services of a contractor to provide Actor and Audience Analysis (AAA) training to a group of DND/CAF personnel. DND will retain proprietary usage of the AAA methodology and courseware in order to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable AAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

5. SCOPE

- 5.1 The Contractor must deliver AAA training for no more than 24 persons.
- 5.2 The Contractor must provide DND/CAF with proprietary usage rights for the AAA methodology as well as the courseware in order to enable a sustained DND/CAF capability using the AAA methodology.

6. TASKS AND DELIVERABLES

- 6.1 The Contractor must deliver comprehensive AAA training that will provide up to 24 students the methodology to a level where they can proficiently apply the methodology to conduct Actor and Audience Analysis;
- 6.2. The Contractor must provide the following equipment for instruction:
- a) Instructor Computers;

- 6.3 The Contractor must provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for no less than 24 students;
- 6.4 The Contractor must design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid-course and end-course points;
- 6.5 Course material must be current and reflect any recent developments in AAA and Strategic Communication over the past calendar year;
- 6.6 The Contractor must develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (focus groups) and quantitative public opinion research;
- 6.7 The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
- 6.8 The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- 6.9 The live case study must be pre-approved by the Technical Authority;
- 6.10 The Contractor must consolidate the student findings from the live case study into a briefing document to be submitted to the Technical Authority no later than one month after the completion of training;
- 6.11 The Contractor must design, conduct and assess written examinations, individual and syndicate presentations; and
- 6.12 The Contractor must provide course certificates of completion to each student at the end of the course.

7. CONSTRAINTS

- 7.1 The course must be conducted in the National Capital Region of Canada;
- 7.2 The course must be conducted at a DND facility;
- 7.3 Training must be carried out during weekdays 07:00 – 16:00, with no weekend training;
- 7.4 Training must be carried out in English; and
- 7.5 The course must involve a blend of distance learning, classroom lectures, syndicate work, student presentations and activities.

8. TECHNICAL ENVIRONMENT

- 8.1 The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) must be used.

9. REPORTING REQUIREMENTS

- 9.1 A progress report must be completed by the Contractor and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;

- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

9.2 All reports must be submitted to the Technical Authority in one (1) hard copy and one (1) soft copy; and

9.3 Soft copy reports must be provided in an accessible format (Microsoft Word or an alternative format approved by the Technical Authority).

10. LANGUAGE REQUIREMENTS

10.1 The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

11. TRAVEL

11.1 Travel to the location of work will be the responsibility of the Contractor. Travel will not be reimbursed separately. As such, it is the responsibility of the Contractor to factor in any travel related costs when submitting their bid; and

11.2 The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction, including the live case study.

12. LOCATION OF WORK

12.1 All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 1, 2020 8:13 PM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: Re: AAA trg

Rob,

All correct except end date is 30 Nov 2020

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, June 1, 2020 2:25 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: AAA trg

Good afternoon Sir,

Please find attached the amended SOW. I would like to confirm the following are correct:

- 7.1 The course must be conducted in the National Capital Region of Canada;
- 12.1 All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

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Thank you,

Rob

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Sent: May 22, 2020 12:26 PM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Fw: AAA trg

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To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA trg

Rob, Attached are two signed docs and some comments to your comments. Appreciate your help. Thx. Plse advise if you need anything else.

Sent from Mail for Windows 10

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: June 11, 2020 7:54 AM
To: [Godin Col SMM@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Godin.Col.SMM@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Re: AAA Course in the fall

Yes Maam

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: Wednesday, June 10, 2020 6:15 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: AAA Course in the fall

In Ottawa?

Colonel Stéphanie Godin

Director Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Communication stratégique militaire
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 10, 2020 6:15 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: AAA Course in the fall

Super, thanks.

Colonel Stéphanie Godin

Director Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Communication stratégique militaire
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 10, 2020 5:52 PM
To: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>
Subject: Re: AAA Course in the fall

Yes Ma'am, current intent is to have it run six weeks from last week in Sept to 6 Nov'6 weeks

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: Wednesday, June 10, 2020 5:07 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: AAA Course in the fall

Doug,

Do we have a rough idea of when and where the course will be and how long it will be?

Thanks.

Colonel Stéphanie Godin

Director Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Communication stratégique militaire
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

s.19(1)

From: Neta LCol SC@1 Cdn Air Div HQ Support Svcs@Winnipeg
Sent: June 11, 2020 9:53 AM
To: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull; Thomson LCol
AE@C Air Force D Air PA@Ottawa-Hull
Subject: RE: Actor Audience Course

Col Godin, please count in for this course. She's very much looking forward to the opportunity.

Thank you,

Lieutenant-Colonel Steve Neta, CD, MBA
Steven.Neta@forces.gc.ca
Cell: 613-866-5932

Director - Air Force Public Affairs
Directeur - Affaires publiques de la Force aérienne

Canadian Armed Forces | Forces armées canadiennes

From: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: June-11-20 7:57 AM
To: Neta LCol SC@C Air Force D Air PA@Ottawa-Hull <Steven.Neta@forces.gc.ca>; Thomson LCol
AE@CJOC HQ@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>
Subject: RE: Actor Audience Course

Good morning,

The current intent is to run the course for six weeks , 28 Sep to 6 Nov, in Ottawa.

Colonel Stéphanie Godin

Director Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Communication stratégique militaire
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 10, 2020 5:08 PM
To: Neta LCol SC@C Air Force D Air PA@Ottawa-Hull <Steven.Neta@forces.gc.ca>; Thomson LCol
AE@CJOC HQ@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>
Subject: RE: Actor Audience Course

Thank you both for confirming. Checking if we can get a rough idea.

s.19(1)

Colonel Stéphanie Godin

Director Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Communication stratégique militaire
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Neta LCol SC@C Air Force D Air PA@Ottawa-Hull
Sent: June 10, 2020 4:30 PM
To: Thomson LCol AE@CJOC HQ@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>; Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>
Subject: Re: Actor Audience Course

Ma'am, do we have dates yet or even a rough idea of how long someone is away? We want to support this and just want to check with the member.

Lieutenant-Colonel Steve Neta, CD, MBA
Steven.Neta@forces.gc.ca
W: 613-944-3422
C: 613-866-5932

Director - Air Force Public Affairs
Directeur - Affaires publiques de la Force aérienne

Canadian Armed Forces | Forces armées canadiennes

Sent from my iPhone

On Jun 10, 2020, at 4:28 PM, Neta LCol SC@C Air Force D Air PA@Ottawa-Hull <Steven.Neta@forces.gc.ca> wrote:

Good. I definitely think [redacted] should do it. She's interested in this and it's good to push someone like her on the course. I'll engage Cheryl as she'd lose [redacted] for around two months I think but it's worth doing... I'll ask her to check with [redacted]

Lieutenant-Colonel Steve Neta, CD, MBA
Steven.Neta@forces.gc.ca
W: 613-944-3422
C: 613-866-5932

Director - Air Force Public Affairs
Directeur - Affaires publiques de la Force aérienne

Canadian Armed Forces | Forces armées canadiennes

Sent from my iPhone

On Jun 10, 2020, at 4:26 PM, Thomson LCol AE@CJOC HQ@Ottawa-Hull

s.19(1)

<ADAM.THOMSON2@forces.gc.ca> wrote:

I fully support sending someone on the AAA course, especially if it means we retain a Capt!
I hear great things about the course and would advocate anyways to get staff on this training for
their own progression.

Adam

From: Neta LCol SC@C Air Force D Air PA@Ottawa-Hull
Sent: June 10, 2020 4:24 PM
To: Godin Col SMM@ADM(PA) DPAP0@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>
Cc: Thomson LCol AE@CJOC HQ@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>
Subject: Re: Actor Audience Course

Ma'am,

I'll talk to Adam and will defer this decision to him. More to follow shortly.

Lieutenant-Colonel Steve Neta, CD, MBA
Steven.Neta@forces.gc.ca
W: 613-944-3422
C: 613-866-5932

Director - Air Force Public Affairs
Directeur - Affaires publiques de la Force aérienne

Canadian Armed Forces | Forces armées canadiennes

Sent from my iPhone

On Jun 10, 2020, at 3:30 PM, Godin Col SMM@ADM(PA) DPAP0@Ottawa-Hull
<STEPHANIE.GODIN@forces.gc.ca> wrote:

Steve,

As you know, s file was not retained and Capt Labonté is being posted to CDSO this
APS. Capt Labonté was originally slated to go to BGen Janzen's team prior to being selected for the
CDS PA position.

Prior to that, in our discussions, if wasn't selected for the CDS position, you were still
going to lose one of your Capts (your choice) and get a newly qualified PAO instead. The Capt
coming out of your shop was going to go in behind whomever was going to be selected for the
CDS position.

Given that Capt Labonté was going to BGen Janzen's team, he was expecting to get one of your
Capts. I recommended to him that we not pursue this COA after all for the following reasons:
Your team is getting a new LCol and a new Maj this APS, the Capts are providing continuity, which
is now especially important given the situ in Winnipeg. D Air PA needs to be more robust as they
will need to support 1 CAD more than originally planned. 1 CAD will have a new Maj this APS and
a Capt position which will remain vacant. This is compounded by the fact that 17 Wing will need to
be supported and augmented by 1 CAD as one of their Capts has been identified to augment 431
Sqn for up to one year. This will therefore leave one of the two 17 Wing Capt positions vacant.

BGen Janzen really needs to build capacity but supports my recommendation, with the condition that you send one of your Capts to the Actor Audience Course in the fall. Length and format of course are still TBD. I think this is probably win-win for all – this course is an amazing PD opportunity.

Can you please confirm that D Air PA will send one Capt on this course?

Thanks Steve, much appreciated.

Colonel Stéphanie Godin

Director Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Communication stratégique militaire
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: June 22, 2020 10:42 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: Re: AAA RFP

Hi Rob,
6-7 weeks tops.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, June 22, 2020 8:36 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: FW: AAA RFP

Good morning Sir,

One question that has come back during the review of the AAA solicitation file is whether or not you want to set a course duration – the course can be no longer than XXX days / hours etc.

Thank you,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: June 11, 2020 8:41 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: AAA RFP

Good morning Sir,

The procurement package has been submitted for approval.

Thank you,

Rob

Rob Best

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Department of National Defence / Government of Canada
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Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 11, 2020 8:05 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: AAA RFP

Morning Rob,

Any update on the status of this?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [Best RL@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Best_RL@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: June 23, 2020 11:14 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: W6369-21-X008 AAA RFP
Attachments: v1-W6369-21-
X008_Actor_and_Audience_Analysis_Training_RFP.DOC

Good morning Sir,

Please find attached subj RFP for translation.

The following links may be required by Translation services for reference.

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

<http://materiel.mil.ca/en/business-functions-procurement-contracting/procurement-administration-manual.page>

Thank you for your assistance in this matter.

Regards,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel:819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
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Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull
Sent: June 11, 2020 8:05 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: AAA RFP

Morning Rob,

Any update on the status of this?

Sent from my BlackBerry 10 smartphone on the Bell network.



National Defence
 National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Défense nationale
 Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2

**REQUEST FOR PROPOSAL /
 DEMANDE DE PROPOSITION**

**RETURN BIDS TO /
 RETOURNER LES SOUMISSIONS À**

Director Services Contracting 4 (D Svcs C)
 Attention: Rob Best
 By email to:
DSvcsC4Contracting-DCSvcs4Contrats@forces.gc.ca

Proposal To: National Defence Canada

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods and services listed herein and on any attached sheets at the price(s) set out therefore.

Proposition à: Défense nationale Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens et services énumérés ici et sur toute feuille ci-annexée, au(x) prix indiqués(s).

Comments – Commentaires

**THIS DOCUMENT DOES NOT CONTAIN
 A SECURITY REQUIREMENT**

**CE DOCUMENT NE CONTIENT
 AUCUNE EXIGENCE EN MATIÈRE
 DE SÉCURITÉ**

<p>Solicitation Closes/ L'invitation prend fin:</p> <p>At / à : 2:00 PM EDT</p> <p>On / le :</p>

<p>Title / Titre: Actor and Audience Analysis Training</p>	<p>Solicitation No / No de l'invitation: W6369-21-X008</p>
<p>Date of Solicitation / Date de l'invitation: June 2020</p>	
<p>Address Enquiries to – Adresser toutes questions à:</p> <p>Rob Best by email to: Robert.Best@forces.gc.ca</p>	
<p>Telephone No. / N° de téléphone:</p>	<p>FAX No / No de fax:</p>
<p>Destination:</p> <p>National Defence Headquarters 101 Colonel By Drive Ottawa, Ontario K1A 0K2</p>	

Instructions:

Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions:

Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente.

<p>Delivery Required – Livraison exigée</p>	<p>Delivery Offered – Livraison proposée</p>
<p>Vendor Name and Address – Raison sociale et adresse du fournisseur</p>	
<p>Name and title of person authorized to sign on behalf of vendor (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie)</p> <p>Name – Nom _____ Title – Titre _____</p> <p>Signature _____ Date _____</p>	

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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

There is no security requirement applicable to this contract.

1.2 Statement of Work

The Contractor must perform the work in accordance with the Statement of Work at Annex "A".

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

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PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the following modifications:

- (a) Section 02, Procurement Business Number, is deleted in its entirety.
- (b) In section 05, Submission of bids, subsection 2.d) is deleted in its entirety and replaced with the following:
 - d. send its bid only to the Department of National Defence organization receiving the bids as specified on page 1 of the bid solicitation;
- (c) In section 05, Submission of bids, subsection 4 is amended as follows:
Delete: 60 days
Insert: 180 calendar days
- (d) Section 06, Late bids, is deleted in its entirety.
- (e) Section 07, Delayed bids, is deleted in its entirety and replaced with the following:
07 Delayed bids
It is the Bidder's responsibility to ensure that its entire submission has been received. Misrouting or other e-mail delivery issues resulting in the late submission of bids are not acceptable reasons for the bid to be accepted by the Department of National Defence.
- (f) In section 08, Transmission by facsimile or by epost Connect, subsections 1.a and 2 are deleted in their entirety.
- (g) In section 20, Further information, subsection 2 is deleted in its entirety.

2.2 Submission of Bids

Unless specified otherwise in the bid solicitation or otherwise directed by the Contracting Authority, bids must be submitted only to the Department of National Defence organization by e-mail by the date and time indicated on page 1 of the bid solicitation.

E-Mail Submissions: Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. Canada will confirm receipt of documents. It is the Bidder's

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responsibility to ensure that its entire submission has been received. Bidders should not assume that all documents have been received unless Canada confirms receipt of each document. In order to minimize the potential for technical issues to affect bid receipt, bidders are requested to include in the body of their e-mail(s) a list of all documents attached to the e-mail(s), and allow sufficient time before the closing date and time to confirm receipt. Canada will not accept any bids submitted after the closing date and time.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S. 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

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By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2019-01 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes () No ()

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks; and
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

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PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that Bidders provide their bid in separately bound sections as follows:

- Section I: Technical Bid - one (1) soft copy submitted by email,
- Section II: Financial Bid - one (1) soft copy submitted by email,
- Section III: Certifications - one (1) soft copy submitted by email.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper; and
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with Annex "B", Basis of Payment. The total amount of Applicable Taxes must be shown separately.

3.1.1 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex "C" to Part 3 Electronic Payment Instruments, to identify which ones are accepted.

If Annex "C" to Part 3 Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

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3.1.2 Exchange Rate Fluctuation

C3011T (2013-11-06), Exchange Rate Fluctuation

3.1.3 Electronic Submissions

Electronic Submissions: Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Department of National Defence (DND) e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. DND will confirm receipt of documents. It is the responsibility of the Bidder to ensure that its entire submission has been received. Bidders must not assume that all documents have been received unless DND confirms receipt of each document. Due to the possibility of e-mail rejection and/or other technical issues, bidders are requested to allow sufficient time before the closing date and time to submit their bid and for DND to confirm receipt. Bid documents received after the closing date and time will not be accepted.

Section III: Certifications

Bidders must submit the certifications and additional information required under Part 5.

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ATTACHMENT 1 to PART 3, PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid its quoted all-inclusive rate (in Can \$).

The inclusion of volumetric data in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

Course	All-Inclusive Fixed Price (Can \$)	Estimated Number of Course Serials	Total (Can \$)
	A	B	C = A x B
Initial Contract Period:			
Cost per course serial, delivered to up to 24 participants.	\$	1	\$
Total, Period of the Contract			\$
Extended Contract period 1:			
Cost per course serial, delivered to up to 24 participants.	\$	1	\$
Total, Extended Contract Period 1			\$
Extended Contract period 2:			
Cost per course serial, delivered to up to 24 participants.	\$	1	\$
Total, Extended Contract Period 2			\$
Total Evaluated Price (inclusive of all option periods)			\$

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4.

4.1.1.2 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4.

4.1.2 Financial Evaluation

4.1.2.1 Mandatory Financial Criteria

For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

4.2 Basis of Selection - Highest Combined Rating of Technical Merit [60%] and Price [40%]

4.2.1 To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation;
- b. meet all the mandatory evaluation criteria; and
- c. obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

4.2.2 Bids not meeting 4.2.1 (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

4.2.3 The lowest evaluated price (LP) of all responsive bids will be identified and a pricing score (PS), determined as follows, will be allocated to each responsive bid (i): $PS_i = LP / P_i \times 40$. P_i is the evaluated price (P) of each responsive bid (i).

4.2.4 A technical merit score (TMS), determined as follows, will be allocated to each responsive bid (i): $TMS_i = OS_i \times 60$. OS_i is the overall score (OS) obtained by each responsive bid (i) for all the point rated technical criteria specified in Attachment 2 to Part 4, determined as follows: total number of points obtained / maximum number of points available.

4.2.5 The combined rating (CR) of technical merit and price of each responsive bid (i) will be determined as follows: $CR_i = PS_i + TMS_i$.

4.2.6 The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract. In the event two or more responsive bids have the same

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highest combined rating of technical merit and price, the responsive bid, with the lowest evaluated price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the Contractor is determined by a 60/40 ratio of the technical merit and price, respectively.

Basis of Selection - Highest Combined Rating of Technical Merit (60%) and Price (40%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Overall Score for All the Point Rated Technical Criteria	OS1: 120/135	OS2: 98/135	OS3: 82/135
Bid Evaluated Price	P1: C\$60,000	P2: C\$55,000	LP and P3: C\$50,000
Calculations	Technical Merit Score (OSi x 60)	Pricing Score (LP/Pi x 40)	Combined Rating
Bidder 1	120/135 x 60 = 53.33	50/60 x 40 = 33.33	86.66
Bidder 2	98/135 x 60 = 43.55	50/55 x 40 = 36.36	79.91
Bidder 3	82/135 x 60 = 36.44	50/50 x 40 = 40.00	76.44

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ATTACHMENT 1 to PART 4, EVALUATION CRITERIA

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

NO.	MANDATORY CRITERION	BID PREPARATION INSTRUCTIONS
MT1	The Bidder must clearly demonstrate it has experience delivering a minimum of one (1) Actor and Audience Analysis (AAA) methodology course/workshop in a group setting where the main topic of the course/workshop was the AAA methodology.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
MT2	The Bidder must clearly demonstrate that it has the ability to deliver the course, all or in part, through a Distance Learning (DL) process.	The necessary documentation to support the bid in meeting this criterion must detail the bidder's ability to deliver the course through a DL process.
MT3	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching a minimum of one (1) Actor and Audience Analysis (AAA) methodology workshop/course.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.
MT4	<p>The Bidder must clearly demonstrate it has the capacity to:</p> <ul style="list-style-type: none"> • design a detailed curriculum and a lecture/activity schedule for the course; • conduct examinations, assessments and individual and syndicate presentations at the mid and end-course points; and • provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 	The necessary documentation to support the bid in meeting this criterion must include details from previous courses delivered or adequately describe of how they intend to meet the criterion.

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2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

#	RATED CRITERION	BID PREPARATION INSTRUCTIONS	POINTS Scoring Method
RT1	In addition to MT1, the bidder should clearly demonstrate it has experience delivering more than one (1) Actor and Audience Analysis (AAA) methodology course/workshop in a group setting where the main topic of course/workshop was the AAA methodology.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.	>1 to 3 courses = 10 points >3 to 5 courses = 20 points >5 courses = 30 points NOTE: MAX 30 points
RT2	In addition to MT3, the Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching more than one (1) Actor and Audience Analysis (AAA) methodology workshop/course.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.	>1 to 3 courses = 10 points >3 to 5 courses = 20 points >5 courses = 30 points NOTE: MAX 30 points
RT3	The Bidder should demonstrate that it has experience providing AAA methodology workshops/courses to NATO Organizations and/or Allies.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.	1 course delivered = 10 points >1 course delivered = 20 points NOTE: MAX 20 points
RT4	The Bidder should demonstrate that it has experience providing AAA methodology workshops/courses to a Military based audience.	The necessary documentation to support the bid in meeting this criterion must detail where, when, month and year and for whom the course/workshop was delivered.	>1 to 3 courses = 10 points >3 to 5 courses = 20 points >5 courses = 30 points NOTE: MAX 30 points
<p>Minimum required = 50 points</p> <p>Maximum available = 110 points</p>			

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PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid list at the time of contract award.

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Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

SACC Manual clause A3005T (2010-08-16) Status and Availability of Resources

5.2.3.2 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

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PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

6.1 Security Requirements

There is no security requirement applicable to the Contract.

6.2 Statement of Work

The Contractor must perform the work in accordance with the Statement of Work at Annex "A".

6.3 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

2035 (2020-05-28), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from the date of the Contract to _____ (to be specified in the resulting contract).

6.4.1.1 Delivery Date

The course must be completed by 30 November 2020.

6.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least thirty (30) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

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6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____ *(to be specified in the resulting contract)*

Title: _____

Public Works and Government Services Canada

Acquisitions Branch

Directorate: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

6.5.2 Technical Authority

The Technical Authority for the Contract is:

Name: _____ *(to be specified in the resulting contract)*

Title: _____

Organization: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contractor's Representative

The Contractor's Representative for the Contract is:

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

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6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2019-01 of the Treasury Board Secretariat of Canada.

6.7 Payment

6.7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, for a cost of \$ _____ (amount to be entered at contract award). Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

6.7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____ (amount to be entered at contract award). Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75% committed, or
 - b. four months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability

6.7.3 Milestone Payments – Not subject to holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment using PWGSC-TPSGC 1111, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;

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c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

6.7.4 Schedule of Milestone Payments

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount	Due Date or "Delivery Date"
1	Course planning and preparation activities (including arrangement of travel and accommodations (as required)).	20% of firm lot price, period of the Contract.	Within the 1st month of the Contract upon receipt of invoice.
2	Completion of training for 1 st half of course.	40% of firm lot price, period of the Contract.	Upon completion of 1 st half of course upon receipt of invoice.
3	Completion of training for 2 nd half of course.	40% of firm lot price, period of the Contract.	Upon completion of 2 nd half of course upon receipt of invoice.

6.7.5 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

6.8 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of a progress report detailing the work completed.

Invoices must be distributed as follows:

- a. The original must be forwarded to the address shown on page 1 of the Contract for certification and payment; and
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

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6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

6.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (c) the general conditions 2035 (2020-05-28), General Conditions - Higher Complexity – Services;
- (d) Annex "A", Statement of Work;
- (e) Annex "B", Basis of Payment;
- (f) Annex "D", Non-Disclosure Agreement;
- (g) the Contractor's bid dated _____, (to be completed at contract award)

6.12 SACC Manual Clauses

G1005C (2016-01-28), Insurance - No Specific Requirement
A9068C (2010-01-11), Government Site Regulations
A9117C (2007-11-30), T1204 - Direct Request by Customer Department
A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)
(or)
A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

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ANNEX "A"- STATEMENT OF WORK

1.0 TITLE

1.1 Actor and Audience Analysis training.

2.0 BACKGROUND

2.1. Assistant Deputy Minister (Public Affairs) (ADM (PA)) is the functional authority for the Public Affairs Branch. ADM (PA) is responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS), Defence Policy and Canadian Armed Forces (CAF) Joint Doctrine. ADM (PA) has identified Actor and Audience Analysis (AAA) as a capability it requires to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.

3.0 LIST OF ACRONYMS AND ABBREVIATIONS

ADM (PA)	Assistant Deputy Minister (Public Affairs)
AAA	Actor and Audience Analysis
CDS	Chief of Defence Staff
CAF	Canadian Armed Forces
DND	Department of National Defence

4.0 OBJECTIVE

4.1. The Department of National Defence (DND) requires the services of a contractor to provide Actor and Audience Analysis (AAA) training to a group of DND/CAF personnel. DND will retain proprietary usage of the AAA methodology and courseware in order to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable AAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

5.0 SCOPE

5.1 The Contractor must deliver AAA training for no more than 24 persons; and
 5.2 The Contractor must provide DND/CAF with proprietary usage rights for the AAA methodology as well as the courseware in order to enable a sustained DND/CAF capability using the AAA methodology.

6.0 TASKS AND DELIVERABLES

6.1 The Contractor must deliver comprehensive AAA training that will provide up to 24 students the methodology to a level where they can proficiently apply the methodology to conduct Actor and Audience Analysis;
 6.2. The Contractor must provide the following equipment for instruction:
 a) Instructor Computers;
 6.3 The Contractor must provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for no less than 24 students;
 6.4 The Contractor must design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid-course and end-course points;

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- 6.5 Course material must be current and reflect any recent developments in AAA and Strategic Communication over the past calendar year;
 - 6.6 The Contractor must develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (focus groups) and quantitative public opinion research;
 - 6.7 The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
 - 6.8 The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
 - 6.9 The live case study must be pre-approved by the Technical Authority;
 - 6.10 The Contractor must consolidate the student findings from the live case study into a briefing document to be submitted to the Technical Authority no later than one month after the completion of training;
 - 6.11 The Contractor must design, conduct and assess written examinations, individual and syndicate presentations; and
 - 6.12 The Contractor must provide course certificates of completion to each student at the end of the course.

7.0 CONSTRAINTS

- 7.1 The course must be conducted in the National Capital Region of Canada;
- 7.2 The course must be conducted at a DND facility;
- 7.3 Training must be carried out during weekdays 07:00 – 16:00, with no weekend training;
- 7.4 Training must be carried out in English; and
- 7.5 The course must involve a blend of distance learning, classroom lectures, syndicate work, student presentations and activities.

8.0 TECHNICAL ENVIRONMENT

- 8.1 The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) must be used.

9.0 REPORTING REQUIREMENTS

- 9.1 A progress report must be completed by the Contractor and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;
 - (c) Any training concerns regarding student performance;
 - (d) Any student concerns regarding course material or delivery;

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- (e) Description of any problems encountered which will require attention or escalation; and
 - (f) Any recommendations to update or change the course schedule.
- 9.2 All reports must be submitted to the Technical Authority in one (1) hard copy and one (1) soft copy; and
- 9.3 Soft copy reports must be provided in an accessible format (Microsoft Word or an alternative format approved by the Technical Authority).
- 10.0 LANGUAGE REQUIREMENTS**
- 10.1 The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.
- 11.0 TRAVEL**
- 11.1 Travel to the location of work will be the responsibility of the Contractor. Travel will not be reimbursed separately. As such, it is the responsibility of the Contractor to factor in any travel related costs when submitting their bid; and
- 11.2 The Contractor must arrange for the lodging and meals and transport of instructor(s) / lecturer(s) to and from the place of instruction, including the live case study.
- 12.0 LOCATION OF WORK**
- 12.1 All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

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ANNEX "B"- BASIS OF PAYMENT

During the period of the Contract, and if the option(s) is exercised, during the extended period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1. Professional Fees

The Contractor will be paid all-inclusive fixed rates as follows: (to be inserted in the resulting contract)

Course	All-Inclusive Fixed Price (Can \$)	Estimated Number of Course Serials	Total (Can \$)
	A	B	C = A x B
Initial Contract Period:			
Cost per course serial, delivered to up to 24 participants.	\$	1	\$
Total, Period of the Contract			\$
Extended Contract period 1:			
Cost per course serial, delivered to up to 24 participants.	\$	1	\$
Total, Extended Contract Period 1			\$
Extended Contract period 2:			
Cost per course serial, delivered to up to 24 participants.	\$	1	\$
Total, Extended Contract Period 2			\$
Total Evaluated Price (inclusive of all option periods)			\$

Total Estimated Cost (to be specified in the resulting contract)

Initial Contract Period: \$ _____

Extended Contract Period 1 (If Option is Exercised): \$ _____

Extended Contract Period 2 (If Option is Exercised): \$ _____

Total Estimated Cost: \$ _____

With the exception of the all-inclusive fixed time rates specified above, the amounts shown in this section of the annex are estimates only. Minor changes to these estimates will be accepted for billing purposes as the Work proceeds, provided that these changes have the prior approval of the Technical Authority, and provided that the total estimated cost of the Contract does not exceed the Limitation of Expenditure specified in clause 6.7 of the Contract.

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ANNEX "C" to PART 3 OF THE BID SOLICITATION

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.1, the Bidder must complete the information requested below, to identify which electronic payment instruments are accepted for the payment of invoices.

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)

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ANNEX "D"- NON-DISCLOSURE AGREEMENT

(This annex is to be completed after contract award and is not required in the bid.)

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. W6369-21-X008 between Her Majesty the Queen in right of Canada, represented by the Department of National Defence and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No. W6369-21-X008.

Signature

Date

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: June 23, 2020 12:00 PM
To: [Bourgeois D@ADM\(PA\).DRMCC@Gagetown](mailto:Bourgeois.D@ADM(PA).DRMCC@Gagetown)
Subject: RE: W6369-21-X008 AAA RFP

Is next Friday 3 Jul feasible?

From: Bourgeois D@ADM(PA).DRMCC@Gagetown
Sent: June-23-20 11:35 AM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>;
+ADM(PA) Linguistic Services - Service Linguistique@ADM(PA).DGPA@Ottawa-Hull <lingserv-servling@forces.gc.ca>
Subject: Re: W6369-21-X008 AAA RFP

Received.

I will have to send your request to the TB, but I fear that they may not be able to meet your requested deadline. What is your hard deadline?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: Tuesday, June 23, 2020 12:19 PM
To: +ADM(PA) Linguistic Services - Service Linguistique@ADM(PA).DGPA@Ottawa-Hull
Subject: FW: W6369-21-X008 AAA RFP

Dear sir/madam, Can I have the following translated by next Tuesday please.

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: June-23-20 11:14 AM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-21-X008 AAA RFP

Good morning Sir,

Please find attached subj RFP for translation.

The following links may be required by Translation services for reference.

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

<http://materiel.mil.ca/en/business-functions-procurement-contracting/procurement-administration-manual.page>

Thank you for your assistance in this matter.

Regards,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: June 22, 2020 10:42 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Re: AAA RFP

Hi Rob,
6-7 weeks tops.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, June 22, 2020 8:36 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: FW: AAA RFP

Good morning Sir,

One question that has come back during the review of the AAA solicitation file is whether or not you want to set a course duration – the course can be no longer than XXX days / hours etc.

Thank you,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: June 11, 2020 8:41 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: AAA RFP

Good morning Sir,

The procurement package has been submitted for approval.

Thank you,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 11, 2020 8:05 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: AAA RFP

Morning Rob,

Any update on the status of this?

Sent from my BlackBerry 10 smartphone on the Bell network.

Ahmad A@ADM(PA) DPAPI@Ottawa-Hull

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: July 8, 2020 7:40 PM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: Fw: Translation request 10269031
Attachments: 10269031_001_FR_v1-W6369-21-X008
_Actor_and_Audience_Analysis_Training_RFP.DOCx

Rob,

Translation attached.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Patricia Gagné <Patricia.Gagne@tpsgc-pwgsc.gc.ca>
Sent: Wednesday, July 8, 2020 3:59 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; +ADM(PA) Linguistic Services - Service Linguistique@ADM(PA) DGPA@Ottawa-Hull
Subject: Translation request 10269031

Hello,

As requested, here is a copy of the translation:

Patricia Gagné

Traductrice-conseil, Division Finances et Approvisionnement
Bureau de la traduction / Services publics et Approvisionnement Canada
patricia.gagne@tpsgc-pwgsc.gc.ca
Tél. : 819-997-0487

Translator and Language Advisor, Finances and Procurement Division
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Tel.: 819-997-0487

National Defence
 National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Défense nationale
 Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2



**REQUEST FOR PROPOSAL /
 DEMANDE DE PROPOSITION**

**RETURN BIDS TO /
 RETOURNER LES SOUMISSIONS À**

Directeur, Contrats des services 4 (DC Svc)
 À l'attention de : Rob Best
 Par courrier électronique à :
DSvcsC4Contracting-DCSvcs4Contrats@forces.gc.ca

Proposal To: National Defence Canada

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods and services listed herein and on any attached sheets at the price(s) set out therefore.

Proposition à: Défense nationale Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens et services énumérés ici et sur toute feuille ci-annexée, au(x) prix indique(s).

Comments – Commentaires

**THIS DOCUMENT DOES NOT CONTAIN
 A SECURITY REQUIREMENT**

**CE DOCUMENT NE CONTIENT
 AUCUNE EXIGENCE EN MATIÈRE
 DE SÉCURITÉ**

Solicitation Closes/
 L'invitation prend
 fin:

 At / à : 14 h (HAE)

 On / le :

Title / Titre: Formation sur l'analyse des acteurs et du public	Solicitation No / No de l'invitation: W6369-21-X008
Date of Solicitation / Date de l'invitation: Juin 2020	
Address Enquiries to – Adresser toutes questions à: Rob Best (par courriel) : Robert.Best@forces.gc.ca	
Telephone No. / N° de téléphone:	FAX No / No de fax:
Destination : Quartier général de la Défense nationale 101, promenade du Colonel By Ottawa (Ontario) K1A 0K2	

Delivery Required – Livraison exigée	Delivery Offered – Livraison proposée
Vendor Name and Address – Raison sociale et adresse du fournisseur	
Name and title of person authorized to sign on behalf of vendor (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie)	
Name – Nom _____	Title – Titre _____
Signature _____	Date _____

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PARTIE 1 – RENSEIGNEMENTS GÉNÉRAUX

1.1 Exigences relatives à la sécurité

Aucune exigence en matière de sécurité ne s'applique au présent contrat.

1.2 Énoncé des travaux

L'entrepreneur doit exécuter les travaux conformément à l'énoncé des travaux qui se trouve à l'annexe A.

1.3 Comptes rendus

Les soumissionnaires peuvent demander un compte rendu des résultats du processus de demande de soumissions. Les soumissionnaires devraient en faire la demande à l'autorité contractante dans les 15 jours ouvrables suivant la réception des résultats du processus de demande de soumissions. Le compte rendu peut être fourni par écrit, par téléphone ou en personne.

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PARTIE 2 – INSTRUCTIONS À L'INTENTION DES SOUMISSIONNAIRES

2.1 Instructions, clauses et conditions uniformisées

Toutes les instructions, clauses et conditions désignées dans la demande de soumissions par un numéro, une date et un titre sont reproduites dans le Guide des clauses et conditions uniformisées d'achat (<https://achatsetventes.gc.ca/politiques-et-lignes-directrices/guide-des-clauses-et-conditions-uniformisees-d-achat>) publié par Travaux publics et Services gouvernementaux Canada (TPSGC).

Les soumissionnaires qui présentent une soumission s'engagent à respecter les instructions, les clauses et les conditions de la demande de soumissions, et acceptent les clauses et les conditions du contrat subséquent.

Le document 2003 (2020-05-28) Instructions uniformisées – biens ou services – besoins concurrentiels, est incorporé par renvoi dans la demande de soumissions et en fait partie intégrante, sous réserve des modifications ci-dessous :

- (a) L'article 02, Numéro d'entreprise - approvisionnement, est supprimé en entier.
- b) Le paragraphe 2.d de la section 05, Présentation des soumissions, est supprimé en entier et remplacé par ce qui suit :
 - d. de présenter sa soumission uniquement à l'organisation du ministère de la Défense nationale qui reçoit les soumissions comme indiqué à la page 1 de la demande de soumissions;
- c) À la section 05, Présentation des soumissions, le sous-alinéa 4 est modifié comme suit :
Supprimer : 60 jours
Insérer : 180 jours civils
- d) La section 06, Soumissions déposées en retard, est supprimée en entier.
- e) La section 07, Soumissions retardées, est supprimée en entier et remplacée par ce qui suit :

07 Soumissions retardées

Il incombe au soumissionnaire de s'assurer que sa soumission a été reçue en entier. Les soumissions reçues en retard en raison d'une erreur d'acheminement ou d'un autre problème lié à la livraison par courriel ne seront pas acceptées par le Ministère de la Défense nationale.

- f) Les paragraphes 1.a et 2 de la section 08, Transmission par télécopieur ou par le service Connexion postal, sont supprimés en entier.
- g) Le paragraphe 2 de la section 20, Autres renseignements, est supprimé en entier.

2.2 Présentation des soumissions

Sauf indication contraire dans l'appel d'offres ou instruction contraire de l'autorité contractante, les soumissions doivent être présentées par courriel ou télécopieur uniquement au Ministère de la Défense nationale à la date et à l'heure indiquées à la page 1 de la demande de soumissions.

Soumissions transmises par courriel : Le système de messagerie électronique ou les pare-feu du Canada peuvent refuser les courriels individuels excédant cinq (5) mégaoctets ou comprenant

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certaines scripts, mises en forme, macros ou hyperliens intégrés, et ce, sans qu'un avis soit envoyé au soumissionnaire ou à l'autorité contractante. Les soumissions plus volumineuses peuvent être envoyées en plusieurs courriels. Le Canada accusera réception des documents. Il incombe au soumissionnaire de s'assurer que sa soumission a été reçue en entier. Le soumissionnaire ne devrait pas supposer que tous ses documents ont été reçus, sauf si le Canada accuse réception de chaque document. Afin de réduire au minimum le risque que des problèmes techniques influent sur la réception des soumissions, les soumissionnaires sont priés d'inclure dans le corps de leurs courriels une liste de tous les documents joints aux courriels et de prévoir suffisamment de temps avant la date de clôture et l'heure pour confirmer la réception. Le Canada n'acceptera aucune soumission présentée après la date et l'heure de clôture.

2.3 Ancien fonctionnaire

Les contrats attribués à d'anciens fonctionnaires qui touchent une pension ou qui ont reçu un paiement forfaitaire doivent résister à l'examen scrupuleux du public et constituer une dépense équitable des fonds publics. Afin de respecter les politiques et les directives du Conseil du Trésor sur les contrats attribués à d'anciens fonctionnaires, les soumissionnaires doivent fournir les renseignements exigés ci-dessous avant l'attribution du contrat. Si les réponses aux questions et, selon les cas, les renseignements requis n'ont pas été fournis à la date de fin de l'évaluation des soumissions, le Canada informera le soumissionnaire du délai imparti pour fournir les renseignements. Le défaut de se conformer à la demande du Canada et de satisfaire à l'exigence dans le délai prescrit rendra la soumission non recevable.

Définitions

Aux fins de cette clause, un « ancien fonctionnaire » est tout ancien employé d'un ministère au sens de la Loi sur la gestion des finances publiques, L.R., 1985, ch. F-11, un ancien membre des Forces canadiennes ou un ancien membre de la Gendarmerie royale du Canada. Un ancien fonctionnaire peut être :

- a. un individu;
- b. un individu qui s'est incorporé;
- c. une société constituée d'anciens fonctionnaires; ou
- d. une entreprise à propriétaire unique ou une entité dans laquelle la personne visée détient un intérêt important ou majoritaire.

La « période du paiement forfaitaire » avait été définie comme la période mesurée en semaines de salaire à l'égard de laquelle un paiement a été fait pour faciliter la transition vers la retraite ou vers un autre emploi par suite de la mise en place des divers programmes de réduction des effectifs de la fonction publique. Sous ce scénario, la période d'application du paiement forfaitaire ne comprenait pas la période visée par l'allocation de fin d'emploi, qui se mesure de façon similaire.

Une « pension » représente une pension ou une allocation annuelle versée en vertu de la Loi sur la pension de la fonction publique (LPFP), L.R., 1985, ch. P-36, et toute augmentation versée en vertu de la Loi sur les prestations de retraite supplémentaires, L.R., 1985, ch. S-24, dans la mesure où elle touche la LPFP. La pension ne comprend pas les pensions payables conformément à la Loi sur la pension de retraite des Forces canadiennes, L.R., 1985, ch. C-17, à la Loi sur la continuation de la pension des services de défense, 1970, ch. D-3, à la Loi sur la continuation des pensions de la Gendarmerie royale du Canada, 1970, ch. R-10, à la Loi sur la pension de retraite de la Gendarmerie royale du Canada, L.R., 1985, ch. R-11, à la Loi sur les allocations de retraite des parlementaires, L.R., 1985, ch. M-5 et à la partie de la pension versée conformément à la Loi sur le Régime de pensions du Canada, L.R., 1985, ch. C-8.

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Ancien fonctionnaire touchant une pension

Selon les définitions précédentes, le soumissionnaire est-il un ancien fonctionnaire percevant une pension?

Oui () Non ()

Dans l'affirmative, le soumissionnaire doit fournir les renseignements suivants pour tous les anciens fonctionnaires touchant une pension, le cas échéant :

- a. le nom de l'ancien fonctionnaire;
 - b. la date de la cessation d'emploi dans la fonction publique ou de la retraite.
- En fournissant ces renseignements, les soumissionnaires acceptent que le statut du soumissionnaire retenu, en tant qu'ancien fonctionnaire touchant une pension, soit publié dans les rapports de divulgation proactive des contrats, sur les sites Web des ministères, et ce, conformément à l'Avis sur la Politique des marchés : 2019-01 et aux Lignes directrices sur la divulgation proactive des marchés.

Directive sur le réaménagement des effectifs

Le soumissionnaire est-il un ancien fonctionnaire qui a touché un paiement forfaitaire conformément aux modalités de la Directive sur le réaménagement des effectifs?

Oui () Non ()

Si c'est le cas, le soumissionnaire doit fournir les renseignements suivants :

- a. le nom de l'ancien fonctionnaire;
- b. les conditions de l'incitatif versé sous forme de paiement forfaitaire;
- c. la date de cessation d'emploi;
- d. le montant du paiement forfaitaire;
- e. le taux de rémunération qui a servi au calcul du paiement forfaitaire;
- f. la période correspondant au paiement forfaitaire, y compris la date de début, la date d'achèvement et le nombre de semaines;
- g. le nombre et le montant (honoraires professionnels) des autres contrats assujettis aux conditions d'un programme de réaménagement des effectifs.

2.4 Demandes de renseignements – en période de soumission

Toutes les demandes de renseignements doivent être présentées par écrit à l'autorité contractante au moins cinq (5) jours civils avant la date de clôture des soumissions. Il est possible qu'on ne réponde pas aux demandes de renseignements reçues après ce délai.

Les soumissionnaires devraient citer le plus fidèlement possible le numéro de l'article de la demande de soumissions auquel se rapporte la question. et prendre soin d'énoncer chaque question de manière suffisamment détaillée pour que le Canada puisse y répondre avec exactitude. Les demandes de renseignements techniques qui ont un caractère exclusif doivent porter clairement la mention « exclusif » vis-à-vis de chaque élément pertinent. Les articles affichant la mention « exclusif » feront l'objet d'une discrétion absolue, sauf si le Canada considère que la demande de renseignements n'a pas un caractère exclusif. Dans ce cas, le gouvernement du Canada peut réviser les questions ou peut demander au soumissionnaire de le faire, afin d'en éliminer le caractère exclusif et de permettre la transmission des réponses à tous les soumissionnaires. Le Canada peut ne pas répondre aux demandes de renseignements dont la formulation ne permet pas de les diffuser à tous les soumissionnaires.

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2.5 Lois applicables

Tout contrat subséquent doit être interprété et régi selon les lois en vigueur en Ontario et les relations entre les parties doivent être déterminées par ces lois.

Les soumissionnaires peuvent, à leur discrétion, indiquer les lois applicables d'une province ou d'un territoire canadien de leur choix, sans compromettre la validité de leur soumission, en supprimant le nom de la province ou du territoire canadien précisé et en insérant le nom de la province ou du territoire canadien de leur choix. Si aucun changement n'est indiqué, cela signifie que les soumissionnaires acceptent les lois applicables indiquées.

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PARTIE 3 – INSTRUCTIONS POUR LA PRÉPARATION DES SOUMISSIONS

3.1 Instructions pour la préparation des soumissions

Le Canada demande que les soumissionnaires fournissent leur soumission en sections distinctes, comme suit :

Section I : Soumission technique : une (1) copie électronique transmise par courriel.

Section II : Soumission financière : une (1) copie électronique transmise par courriel.

Section III : Attestations : une (1) copie électronique transmise par courriel.

Les prix ne doivent figurer que dans la soumission financière. Aucun prix ne doit être indiqué ailleurs dans la soumission.

Le Canada demande que les soumissionnaires suivent les instructions de présentation décrites ci-après pour préparer leur soumission :

- a) utiliser du papier de 8,5 x 11 po (216 x 279 mm);
- b) utiliser un système de numérotation correspondant à celui de la demande de soumissions;

En avril 2006, le Canada a adopté une politique exigeant que les ministères et organismes fédéraux prennent les mesures nécessaires pour incorporer les facteurs environnementaux dans le processus d'approvisionnement : la Politique d'achats écologiques (<https://www.tbs-sct.gc.ca/pol/doc-fra.aspx?id=32573>). Pour aider le Canada à atteindre ses objectifs, les soumissionnaires devraient :

- 1) utiliser du papier de 8,5 po x 11 po (216 mm x 279 mm) contenant des fibres certifiées provenant d'un aménagement forestier durable et contenant au moins 30 % de matières recyclées;
- 2) présenter le document dans un format qui respecte l'environnement, notamment une impression en noir et blanc plutôt qu'en couleur, une impression recto verso ou à double face, des agrafes ou des trombones plutôt qu'une reliure Cerlox, une reliure à attaches ou une reliure à anneaux.

Section I : Soumission technique

Dans leur soumission technique, les soumissionnaires doivent expliquer et démontrer comment ils ont l'intention de répondre aux exigences et comment ils réaliseront les travaux.

Section II : Soumission financière

Les soumissionnaires doivent présenter leur soumission financière en conformité avec l'annexe B – Base de paiement. Le montant total des taxes applicables doit être indiqué séparément.

3.1.1 Paiement électronique des factures – Soumission

Si vous êtes disposé à accepter les paiements de factures effectués à l'aide des instruments de paiement électroniques, remplissez l'annexe « C » à la Partie 3, Instruments de paiement électronique, pour préciser ceux qui sont acceptés.

Si l'annexe « C » à la Partie 3, Instruments de paiement électronique, n'a pas été remplie, on considérera que le paiement de factures au moyen d'instruments de paiement électronique ne sera pas accepté.

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L'acceptation d'instruments de paiement électronique ne sera pas considérée comme un critère d'évaluation.

3.1.2 Fluctuation du taux de change

C3011T (2013-11-06), Fluctuation du taux de change

3.1.3 Transmissions électroniques

Soumissions transmises par voie électronique : Le système de messagerie électronique ou les pare-feux du MDN peuvent refuser les courriels individuels excédant cinq (5) mégaoctets ou comprenant certains scripts, mises en forme, macros ou hyperliens intégrés, et ce, sans qu'un avis soit envoyé au soumissionnaire ou à l'autorité contractante. Les soumissions plus volumineuses peuvent être envoyées en plusieurs courriels. Le MDN accusera réception des documents. Il incombe au soumissionnaire de s'assurer que sa soumission a été reçue en entier. Le soumissionnaire ne doit pas supposer que tous ses documents ont été reçus, sauf si le MDN accuse réception de chaque document. Étant donné le risque que le courriel soit refusé ou que d'autres problèmes techniques surviennent, les soumissionnaires devraient prévoir un délai suffisant avant la date et l'heure de clôture pour présenter leur soumission et pour que le MDN en accuse réception. Les documents reçus après la date et l'heure de clôture seront rejetés.

Section III : Attestations

Les soumissionnaires doivent présenter les attestations et les renseignements supplémentaires exigés à la partie 5.

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PIÈCE JOINTE 1 DE LA PARTIE 3 – BARÈME DE PRIX

Le soumissionnaire devrait remplir ce barème de prix et le joindre ensuite à sa soumission financière. Le soumissionnaire doit au moins répondre à ce barème de prix en incluant dans sa soumission financière un taux tout compris (en dollars canadiens).

L'inclusion de données volumétriques dans le présent barème de prix ne constitue pas un engagement de la part du Canada quant à l'utilisation qu'il fera ultérieurement des services décrits dans la demande de propositions.

Cours	Taux horaire ferme tout compris Prix (en \$ CA)	Nombre estimé de cours à donner	Total (dollars canadiens)
	A	B	C = A × B
Période initiale du contrat :			
Coût par série de cours donnée à un maximum de 24 participants.	\$	1	\$
Total pour la période du contrat			\$
Période de prolongation du contrat 1 :			
Coût par série de cours donnée à un maximum de 24 participants.	\$	1	\$
Total pour la période de prolongation du contrat 1			\$
Période de prolongation du contrat 2 :			
Coût par série de cours donnée à un maximum de 24 participants.	\$	1	\$
Total pour la période de prolongation du contrat 2			\$
Prix total évalué (y compris toutes les périodes d'option)			\$

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PARTIE 4 – PROCÉDURES D'ÉVALUATION ET MÉTHODE DE SÉLECTION

4.1 Procédures d'évaluation

- a) Les soumissions seront évaluées par rapport à l'ensemble des exigences de la demande de soumissions, y compris les critères d'évaluation techniques et financiers.
- b) Une équipe d'évaluation composée de représentants du Canada évaluera les soumissions.

4.1.1 Évaluation technique

4.1.1.1 Critères techniques obligatoires

Se reporter à la pièce jointe 1 de la partie 4.

4.1.1.2 Critères techniques cotés

Se reporter à la pièce jointe 1 de la partie 4.

4.1.2 Évaluation financière

4.1.2.1 Critères financiers obligatoires

Aux fins d'évaluation des soumissions et de sélection de l'entrepreneur seulement, le prix évalué d'une soumission sera déterminé conformément au barème de prix détaillé dans la pièce jointe 1 à la partie 3.

4.2 Méthode de sélection - Note combinée la plus élevée pour le mérite technique (60 %) et le prix (40 %)

4.2.1 Pour être déclarée recevable, une soumission doit :

- a. respecter toutes les exigences de la demande de soumissions;
- b. répondre à tous les critères d'évaluation technique obligatoires;
- c. obtenir le nombre de points minimum requis précisés dans la pièce jointe 1 de la partie 4 portant sur l'évaluation des critères techniques.

4.2.2 Les soumissions ne répondant pas à l'une ou l'autre des exigences a), b) et c) de la section 4.2.1 seront déclarées non recevables. La soumission recevable ayant obtenu le plus de points ou celle dont le prix évalué est le plus bas ne sera pas nécessairement acceptée.

4.2.3 De toutes les soumissions recevables, le prix évalué le plus bas (PPB) sera déterminé et une note pour le prix (NP), établie comme suit, sera attribuée à chaque soumission recevable (i) : $NP_i = PPB/P_i \times 40$. P_i est le prix évalué (P) de chaque soumission recevable (i).

4.2.4 Une note de mérite technique (NMT), déterminée de la manière décrite ci-après, sera attribuée à chaque soumission recevable (i), selon la formule : $NMT_i = NG_i \times 60$. NG_i est la note globale (NG) obtenue par chaque soumission recevable (i) pour tous les critères techniques cotés spécifiés dans la pièce jointe 2 de la partie 4, selon la formule suivante : le nombre total de points obtenus divisé par le nombre maximum de points possible.

4.2.5 Le pointage combiné (PC) du mérite technique et du prix de chaque soumission recevable (i) sera déterminé par la formule suivante : $PC_i = NP_i + NMT_i$.

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4.2.6 La soumission recevable qui a obtenu la note combinée la plus élevée pour le prix et le mérite technique sera recommandée pour attribution d'un contrat. Si deux soumissions recevables ou plus ont obtenu la même note combinée pour le prix et le mérite technique, la soumission recevable qui a le prix évalué le plus bas sera recommandée pour l'attribution d'un contrat.

Le tableau qui suit montre un exemple de trois soumissions recevables. La sélection de l'entrepreneur se fait selon un rapport de 60/40 pour le mérite technique et le prix, respectivement.

Méthode de sélection – note combinée la plus élevée pour le mérite technique (60 %) et le prix (40 %)			
Soumissionnaire	Soumissionnaire 1	Soumissionnaire 2	Soumissionnaire 3
Note globale pour tous les critères techniques cotés	NG1 : 120/135	NG2 : 98/135	NG3 : 82/135
Prix évalué de la soumission	P1 : 60 000 \$CA	P2 : 55 000 \$CA	PPB et P3 : 50 000 \$CA
Calculs	Note pour le mérite technique (NGi x 60)	Note pour le prix (PPB/Pi x 40)	Note combinée
Soumissionnaire 1	120/135 x 60 = 53,33	50/60 x 40 = 33,33	86,66
Soumissionnaire 2	98/135 x 60 = 43,55	50/55 x 40 = 36,36	79,91
Soumissionnaire 3	82/135 x 60 = 36,44	50/50 x 40 = 40,00	76,44

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PIÈCE JOINTE 1 À LA PARTIE 4 – CRITÈRES D'ÉVALUATION

1. CRITÈRES D'ÉVALUATION OBLIGATOIRES

Dans leur proposition, les soumissionnaires doivent montrer qu'ils satisfont aux critères obligatoires ci-dessous en donnant les détails de l'expérience, notamment le nom et la description des organisations du client, la portée, la période couverte (mois et année de début et de fin), ainsi que la description des rôles et responsabilités.

Les soumissions qui ne satisfont pas à tous les critères obligatoires seront jugées non conformes et rejetées d'emblée.

N°	CRITÈRE OBLIGATOIRE	PRÉPARATION DE SOUMISSION CONSIGNES
CTO1	Le soumissionnaire doit clairement démontrer qu'il possède de l'expérience en ayant déjà donné au moins un (1) cours ou atelier en groupe sur l'analyse des acteurs et du public où le sujet principal était la méthode d'APC.	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit préciser l'endroit, la date, le mois et année et à qui le cours/atelier a été donné.
CTO2	Le soumissionnaire doit clairement démontrer qu'il a la capacité de donner le cours, en tout ou en partie, par le biais d'un processus d'apprentissage à distance.	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit détailler la capacité du soumissionnaire à fournir le cours dans le cadre d'un processus d'apprentissage à distance.
CTO3	Le soumissionnaire doit clairement démontrer que l'instructeur en chef qu'il propose possède de l'expérience en enseignement et a donné au moins un cours/atelier sur l'analyse des acteurs et du public.	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit préciser l'endroit, la date, le mois et année et à qui le cours/atelier a été donné.
CTO4	<p>Le soumissionnaire doit clairement démontrer qu'il est en mesure de faire ce qui suit :</p> <ul style="list-style-type: none"> • Concevoir un programme détaillé ainsi qu'un calendrier de cours et d'activités pour le programme. • Effectuer des examens, des évaluations et des présentations individuelles et en groupe en milieu et fin de programme. • Fournir le matériel d'apprentissage requis, notamment des exposés accompagnés de diapositives, des documents à distribuer et des documents de référence (électroniques ou sur papier) pour un maximum de 24 étudiants. 	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit comprendre des détails sur les cours offerts précédemment ou décrire de manière adéquate la manière dont il entend répondre au critère.

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2. CRITÈRES D'ÉVALUATION COTÉS

Dans leur proposition, les soumissionnaires devraient montrer qu'ils satisfont aux critères cotés ci-dessous en donnant les détails de l'expérience, notamment le nom et la description des organisations du client, la portée, la période couverte (mois et année de début et de fin), ainsi que la description des rôles et responsabilités.

N°	CRITÈRES COTÉS	PRÉPARATION DE SOUMISSION CONSIGNES	POINTS Méthode de cotation
CTC1	En plus du CTO1, le soumissionnaire devrait clairement démontrer qu'il possède de l'expérience en ayant déjà donné plus d'un (1) cours ou animé plus de deux ateliers en groupe sur la méthode d'analyse des publics cibles (APC) où le sujet principal était la méthode d'APC.	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit préciser l'endroit, la date, le mois et année et à qui le cours/atelier a été donné.	Jusqu'à 3 cours = 10 points De 3 à 5 cours = 20 points 5 cours et plus = 30 points REMARQUE : 30 points MAXIMUM
CTC2	En plus du CTO3, le soumissionnaire doit clairement démontrer que les instructeurs principaux proposés ont de l'expérience dans l'enseignement de plus d'un (1) atelier/cours sur la méthode d'analyse des publics cibles (APC).	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit préciser l'endroit, la date, le mois et année et à qui le cours/atelier a été donné.	Jusqu'à 3 cours = 10 points De 3 à 5 cours = 20 points 5 cours et plus = 30 points REMARQUE : 30 points MAXIMUM
CTC3	Le soumissionnaire devrait démontrer qu'il a de l'expérience en organisation d'ateliers/de cours sur la méthode d'APC pour les organisations de l'OTAN et/ou ses alliés.	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit préciser l'endroit, la date, le mois et année et à qui le cours/atelier a été donné.	1 cours offert = 10 points Plus d'un (1) cours offert = 20 points REMARQUE : 20 points MAXIMUM
CTC4	Le soumissionnaire doit démontrer qu'il a de l'expérience dans la fourniture d'ateliers/cours sur la méthode d'APC à un public militaire.	La documentation nécessaire pour soutenir l'offre en vue de satisfaire à ce critère doit préciser l'endroit, la date, le mois et année et à qui le cours/atelier a été donné.	Jusqu'à 3 cours = 10 points De 3 à 5 cours = 20 points 5 cours et plus = 30 points REMARQUE : 30 points MAXIMUM

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N°	CRITÈRES COTÉS	PRÉPARATION DE SOUSSION CONSIGNES	POINTS Méthode de cotation
<p style="text-align: center;"><i>Nombre minimal de points requis = 50 points</i></p> <p style="text-align: center;"><i>Maximum disponible = 110 points</i></p>			

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PARTIE 5 – ATTESTATIONS ET RENSEIGNEMENTS SUPPLÉMENTAIRES

Les soumissionnaires doivent fournir les attestations et les renseignements supplémentaires exigés pour qu'un contrat leur soit attribué.

Les attestations que les soumissionnaires remettent au gouvernement du Canada peuvent faire l'objet d'une vérification à tout moment par celui-ci. À moins d'indication contraire, le Canada déclarera une soumission non recevable, ou un entrepreneur en situation de manquement, s'il est établi que le soumissionnaire a fait de fausses déclarations, sciemment ou non, que ce soit pendant la période d'évaluation des soumissions ou pendant la durée du contrat.

L'autorité contractante aura le droit de demander des renseignements supplémentaires pour vérifier les attestations du soumissionnaire. À défaut de répondre et de coopérer à toute demande ou exigence imposée par l'autorité contractante, la soumission sera déclarée non recevable, ou constituera un manquement aux termes du contrat.

5.1 Attestations exigées avec la soumission

Les soumissionnaires doivent fournir les attestations suivantes dûment remplies avec leur soumission.

5.1.1 Dispositions relatives à l'intégrité – Déclaration de condamnation à une infraction

Conformément aux Dispositions relatives à l'intégrité des instructions uniformisées, tous les soumissionnaires doivent fournir avec leur proposition, le cas échéant, le formulaire de déclaration d'intégrité se trouvant sur le site Web des Formulaires concernant le Régime d'intégrité (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-fra.html>), afin que leur proposition soit prise en compte dans le cadre du processus d'approvisionnement.

5.2 Attestations préalables à l'attribution du contrat et renseignements supplémentaires

Les attestations et renseignements supplémentaires énoncés ci-dessous devraient être joints à la soumission, mais peuvent aussi être présentés par la suite. Si l'une des attestations exigées ou l'un des renseignements supplémentaires requis n'est pas fourni conformément aux exigences, l'autorité contractante informera le soumissionnaire du délai dont il dispose pour le faire. Si le soumissionnaire ne fournit pas les attestations et les renseignements supplémentaires énumérés ci-dessous dans le délai établi, sa soumission sera déclarée non recevable.

5.2.1 Dispositions relatives à l'intégrité – documentation exigée

Conformément à la section intitulée Renseignements à fournir lors d'une soumission, de la passation d'un contrat ou de la conclusion d'un accord immobilier de la Politique d'inadmissibilité et de suspension (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-fra.html>), le soumissionnaire doit fournir la documentation requise, selon le cas, pour que son offre passe à l'étape suivante du processus.

5.2.2 Programme de contrats fédéraux pour l'équité en matière d'emploi – Attestation de soumission

En présentant une soumission, le soumissionnaire atteste que ni lui ni un membre de la coentreprise, si le soumissionnaire est une coentreprise, ne sont nommés dans la « Liste des soumissionnaires à admissibilité limitée du PCF » qui figure au bas de la page du site Web du Programme du travail – Emploi et Développement social Canada <https://www.canada.ca/fr/emploi-developpement-social/programmes/equite-emploi/programme-contrats-federaux.html#>).

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Le Canada aura le droit de déclarer une soumission non recevable si le soumissionnaire, ou tout membre de la coentreprise si le soumissionnaire est une coentreprise, figure dans la liste des « soumissionnaires à admissibilité limitée du PCF » au moment de l'attribution du contrat.

Le Canada aura aussi le droit de résilier le contrat pour manquement si l'entrepreneur ou, le cas échéant, tout membre de la coentreprise figure sur la « Liste des soumissionnaires à admissibilité limitée du PCF » pendant la durée du contrat.

Le soumissionnaire doit fournir à l'autorité contractante l'annexe intitulée Programme de contrats fédéraux pour l'équité en matière d'emploi – Attestation dûment remplie avant l'attribution du contrat. Si le soumissionnaire est une coentreprise, il doit fournir à l'autorité contractante l'annexe Programme de contrats fédéraux pour l'équité en matière d'emploi – Attestation dûment remplie pour chaque membre de la coentreprise.

5.2.3 Attestations supplémentaires préalables à l'attribution du contrat

5.2.3.1 Statut et disponibilité du personnel

Guide des CCUA, clause A3005T (2010-08-16) Statut et disponibilité du personnel

5.2.3.2 Études et expérience

Guide des CCUA, clause A3010T (2010-08-16) Études et expérience

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PARTIE 6 – CLAUSES DU CONTRAT SUBSÉQUENT

Les clauses et conditions suivantes s'appliquent à tout contrat découlant de la demande de soumissions et en font partie intégrante.

6.1 Exigences relatives à la sécurité

Le contrat ne comporte aucune exigence relative à la sécurité.

6.2 Énoncé des travaux

L'entrepreneur doit exécuter les travaux conformément à l'énoncé des travaux qui se trouve à l'annexe A.

6.3 Clauses et conditions uniformisées

Toutes les clauses et conditions définies dans le contrat par un numéro, une date et un titre sont reproduites dans le Guide des clauses et conditions uniformisées d'achat (<https://achatsetventes.gc.ca/politiques-et-lignes-directrices/guide-des-clauses-et-conditions-uniformisees-d-achat>) publié par Travaux publics et Services gouvernementaux Canada.

6.3.1 Conditions générales

2035 (2020-05-28) Conditions générales – besoins plus complexes de services, s'applique au contrat et en fait partie intégrante.

6.3.2 Conditions générales supplémentaires

4007 (2010-08-16), Le Canada détient les droits de propriété intellectuelle sur les renseignements originaux, s'applique au contrat et en fait partie intégrante.

6.4 Durée du contrat

6.4.1 Période du contrat

La période du contrat s'étend de la date de l'attribution du contrat jusqu'à _____ **(à préciser dans le contrat subséquent)**

6.4.1.1 Date de livraison

Le cours doit être terminé d'ici le 30 novembre 2020.

6.4.2 Option de prolongation du contrat

L'entrepreneur accorde au Canada l'option irrévocable de prolonger la durée du marché pour au plus deux (2) périodes supplémentaires d'une (1) année chacune, selon les mêmes conditions. L'entrepreneur convient que pendant la période de prolongation du contrat, il sera rémunéré conformément aux dispositions applicables énoncées dans la Base de paiement.

Le Canada peut exercer cette option à n'importe quel moment, en envoyant un avis écrit à l'entrepreneur au moins trente (30) jours civils avant la date d'expiration du contrat. Cette option ne pourra être exercée que par l'autorité contractante et sera confirmée, pour des raisons administratives seulement, par une modification au contrat.

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6.5 Responsables

6.5.1 Autorité contractante

L'autorité contractante pour le contrat est :

Nom : _____ (à préciser dans le contrat subséquent)

Titre : _____

Travaux publics et Services gouvernementaux Canada

Direction générale des approvisionnements

Direction : _____

Adresse : _____

Téléphone : ____-____-____

Télécopieur : ____-____-____

Adresse électronique : _____

L'autorité contractante est responsable de la gestion du contrat, et elle doit autoriser par écrit toute modification au contrat. L'entrepreneur ne doit pas effectuer de travaux dépassant la portée du contrat ou des travaux qui n'y sont pas prévus suite à des demandes ou instructions verbales ou écrites de toute personne autre que l'autorité contractante.

6.5.2 Responsable technique

Le responsable technique pour ce contrat est :

Nom : _____ (à préciser dans le contrat subséquent)

Titre : _____

Organisation : _____

Adresse : _____

Téléphone : ____-____-____

Télécopieur : ____-____-____

Adresse électronique : _____

Le responsable technique représente le ministère ou l'organisme pour lequel les travaux sont exécutés dans le cadre du contrat. Il est responsable de toutes les questions liées au contenu technique des travaux prévus dans le contrat. On peut discuter des questions techniques avec le responsable technique; cependant, il ne peut pas autoriser les changements à apporter à la portée des travaux. Des changements à l'énoncé des travaux peuvent être effectués uniquement au moyen d'une modification au contrat émise par l'autorité contractante.

6.5.3 Représentant de l'entrepreneur

Le représentant de l'entrepreneur pour le contrat est :

Nom : _____

Titre : _____

Organisation : _____

Adresse : _____

Téléphone : ____-____-____

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Télécopieur : ____-____-____
Adresse électronique : _____

6.6 Divulgence proactive de marchés conclus avec d'anciens fonctionnaires

En fournissant des renseignements sur son statut en tant qu'ancien fonctionnaire touchant une pension en vertu de la Loi sur la pension de la fonction publique (LPFP), l'entrepreneur a accepté que ces renseignements soient publiés sur les sites Web des ministères, dans le cadre des rapports de divulgation proactive des marchés, et ce, conformément à l'Avis sur la Politique des marchés : 2019-01 du Secrétariat du Conseil du Trésor du Canada.

6.7 Paiement

6.7.1 Base de paiement

À condition de remplir de façon satisfaisante toutes ses obligations dans le cadre du contrat, l'entrepreneur se verra payer un prix ferme, soit un montant total de _____ \$ (montant à insérer au moment de l'attribution du contrat). Les droits de douane sont compris et les taxes applicables sont en sus.

Le Canada ne paiera pas l'entrepreneur pour tout changement apporté à la conception ni pour toute modification ou interprétation des travaux, à moins que ces changements, ces modifications ou ces interprétations n'aient été approuvés par écrit par l'autorité contractante avant d'être intégrés aux travaux.

6.7.2 Limitation des dépenses

1. La responsabilité totale du Canada envers l'entrepreneur, conformément au contrat, ne doit pas dépasser _____ \$ (montant à insérer au moment de l'attribution du contrat). Les droits de douane sont compris et les taxes applicables sont en sus.
2. Aucune augmentation de la responsabilité totale du Canada ou du prix des travaux découlant de toute modification technique, modification ou interprétation des travaux ne sera autorisée ou payée à l'entrepreneur, à moins que ces modifications techniques, modifications ou interprétations n'aient été approuvées, par écrit, par l'autorité contractante avant d'être intégrées aux travaux. L'entrepreneur n'est pas tenu d'exécuter des travaux ou de fournir des services qui occasionneraient une augmentation de la responsabilité totale du Canada, à moins que l'augmentation n'ait été autorisée par écrit par l'autorité contractante. L'entrepreneur doit informer, par écrit, l'autorité contractante concernant la suffisance de cette somme :
 - a. lorsque 75 % de la somme est engagée, ou
 - b. quatre mois avant la date d'expiration du contrat, ou
 - c. dès que l'entrepreneur juge que les fonds du contrat sont insuffisants pour l'achèvement des travaux, selon la première des conditions à se présenter.
3. Lorsqu'il informe l'autorité contractante que les fonds du contrat sont insuffisants, l'entrepreneur doit lui fournir par écrit une estimation des fonds supplémentaires requis. La présentation de cette information par l'entrepreneur n'augmente pas la responsabilité du Canada à son égard.

6.7.3 Paiement d'étape – Non assujéti à une retenue

Le Canada versera des paiements d'étape selon le calendrier des étapes décrit dans le contrat et les modalités de paiement du contrat, si :

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- a. une demande de paiement exacte et complète est présentée au moyen du formulaire PWGSC-TPSGC 1111, Demande de paiement progressif, et si tout autre document exigé par le contrat a été présenté conformément aux instructions sur la facturation qui y figurent;
- b. toutes les attestations demandées dans le formulaire PWGSC-TPSGC 1111 ont été signées par les représentants autorisés respectifs;
- c. tous les travaux associés à l'étape et, selon le cas, tous les produits livrables, ont été reçus et acceptés par le Canada.

6.7.4 Calendrier des paiements d'étape

Est présenté ci-dessous le calendrier des étapes où des paiements seront effectués dans le cadre du contrat :

N° de l'étape	Description ou « produit livrable »	Prix ferme	Date d'échéance ou « Date de livraison »
1	Planification des cours et activités de préparation. (y compris les dispositions prises pour le voyage et l'hébergement, selon les besoins).	20 % du prix de lot ferme, durée du contrat.	Dans le premier mois du contrat après réception des factures applicables.
2	Achèvement de la formation pour la première moitié du programme.	40 % du prix de lot ferme, durée du contrat.	À l'achèvement de la première moitié du programme, à la réception de la facture.
3	Achèvement de la formation pour la deuxième moitié du programme.	40 % du prix de lot ferme, durée du contrat.	À l'achèvement de la deuxième moitié du programme, à la réception de la facture.

6.7.5 Paiement électronique des factures – Contrat

L'entrepreneur accepte d'être payé au moyen des instruments de paiement électronique suivants :

- a. Carte d'achat Visa;
- b. Carte d'achat MasterCard;
- c. Dépôt direct (national et international);
- d. Échange de données informatisé (EDI);
- e. Virement télégraphique (international seulement);
- f. système de transfert de paiements de grande valeur (plus de 25 M\$).

6.8 Instructions relatives à la facturation

L'entrepreneur doit présenter ses factures conformément à la section des conditions générales intitulée « Présentation des factures ». Les factures ne peuvent être soumises tant que tous les travaux qui y sont indiqués ne sont pas terminés.

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Chaque facture doit être accompagnée de ce qui suit :

- a. Une copie d'un rapport d'étape détaillant les travaux réalisés.

Les factures doivent être distribuées de la façon suivante :

- a. La facture originale doit être envoyée à l'adresse indiquée à la page 1 du contrat aux fins d'attestation et de paiement.
- b. Une (1) copie doit être envoyée à l'autorité contractante indiquée dans la section « Responsables » du contrat.

6.9 Attestations et renseignements supplémentaires

6.9.1 Conformité

À moins d'indications contraires, le respect continu des attestations fournies par l'entrepreneur dans sa soumission ou préalablement à l'attribution du contrat, ainsi que la coopération constante quant aux renseignements supplémentaires à fournir, sont des conditions du contrat, et leur non-respect constituera un manquement de la part de l'entrepreneur. Les attestations pourront faire l'objet de vérifications par le gouvernement du Canada pendant toute la durée du contrat.

6.10 Lois applicables

Le contrat doit être interprété et régi selon les lois en vigueur en Ontario, et les relations entre les parties seront déterminées par ces lois.

6.11 Ordre de priorité des documents

En cas d'incompatibilité entre le libellé des documents énumérés dans la liste, c'est le libellé du document indiqué en premier sur la liste qui l'emporte sur celui de tout autre document qui figure par la suite sur ladite liste :

- a) les articles de la convention;
- b) les conditions générales supplémentaires 4007 (2010-08-16), Le Canada détient les droits de propriété intellectuelle sur les renseignements originaux;
- c) les conditions générales 2035 (2020-05-28), Conditions générales – besoins plus complexes de services;
- d) Annexe A, Énoncé des travaux;
- e) Annexe B, Base de paiement;
- f) Annexe D, Entente de non-divuligation;
- g) Soumission de l'entrepreneur en date du _____. (à remplir au moment de l'attribution du contrat)

6.12 Clauses du Guide des CCUA

G1005C (2016-01-28), Assurance – aucune exigence particulière
A9068C (2010-01-11), Règlements concernant les emplacements du gouvernement
A9117C (2007-11-30) T1204 - Demande directe du ministère client
A2001C (2006-06-16), Ressortissants étrangers (entrepreneur étranger)
(OU)
A2000C (2006-06-16), Ressortissants étrangers (entrepreneur canadien)

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ANNEXE « A » – ÉNONCÉ DES TRAVAUX

1.0 TITRE

1.1 Formation sur l'analyse des acteurs et du public.

2.0 RENSEIGNEMENTS GÉNÉRAUX

2.1 Le Sous-ministre adjoint (Affaires publiques) [SMA(AP)] est l'autorité fonctionnelle de la Direction générale des affaires publiques. Le SMA(AP) est responsable du développement des capacités en matière d'affaires publiques militaires pour soutenir le Chef d'état-major de la Défense (CEMD), la Politique de défense et la doctrine interarmées des Forces armées canadiennes (FAC). Le SMA(AP) a indiqué que l'analyse des acteurs et du public était une capacité requise pour appuyer le ciblage, les Opérations d'information et la communication stratégique interarmées dans le cadre de son initiative afin d'opérationnaliser la Direction générale des affaires publiques.

3.0 LISTE DES SIGLES ET DES ABRÉVIATIONS

SMA(AP)	Sous-ministre adjoint (Affaires publiques)
AAP	Analyse des acteurs et du public
CEMD	Chef d'état-major de la Défense
FAC	Forces armées canadiennes
MDN	Ministère de la Défense nationale

4.0 OBJECTIF

4.1 Le Ministère de la Défense nationale (MDN) a besoin des services d'un entrepreneur pour fournir une formation sur l'analyse des acteurs et du public (AAP) à un groupe de personnel du MDN et des FAC. Le MDN conservera l'usage exclusif de la méthode et des didacticiels d'AAP afin de fournir une formation interne à un noyau suffisant de personnel. Cela contribuera à la création d'un programme de capacités durables d'AAP qui soutiendra le ciblage, les Opérations d'information et la communication stratégique interarmées à long terme.

5.0 PORTÉE

5.1 L'entrepreneur doit offrir une formation sur l'AAP à un maximum de 24 personnes.

5.2 L'entrepreneur doit fournir au MDN/aux FAC des droits d'utilisation exclusifs pour la méthode et le didacticiel sur l'AAP afin de permettre une capacité soutenue du MDN/des FAC à l'aide de la méthode sur l'AAP.

6.0 TÂCHES ET PRODUITS LIVRABLES

6.1 L'entrepreneur doit offrir une formation complète sur l'AAP qui permettra à 24 étudiants au maximum d'appliquer la méthode à un niveau suffisant pour réaliser de façon efficace une analyse des acteurs et du public.

6.2 L'entrepreneur doit fournir l'équipement suivant pour l'instruction :

a) Ordinateurs de l'instructeur.

6.3 L'entrepreneur doit fournir tout le matériel d'apprentissage, notamment des livres, des exposés accompagnés de transparents et des documents de référence (électroniques ou sur papier) pour un maximum de 24 étudiants.

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- 6.4 L'entrepreneur doit concevoir un programme détaillé ainsi qu'un calendrier de cours et d'activités comprenant des examens et des évaluations au milieu et à la fin du programme.
 - 6.5 Le matériel de cours doit être à jour et refléter tous les développements récents en matière d'APC et de communication stratégique au cours de la dernière année civile.
 - 6.6 L'entrepreneur doit développer, faciliter et organiser la logistique d'une étude de cas réels, y compris la conduite de recherches qualitatives (groupes de discussion) et quantitatives sur l'opinion publique.
 - 6.7 L'étude de cas réels doit porter sur les problèmes des FAC et du MDN, les constatations qui en résultent étant applicables dans la pratique aux FAC et au MDN.
 - 6.8 L'étude de cas réels doit être menée conformément aux normes éthiques acceptées en matière de recherche sur l'opinion publique.
 - 6.9 Les études de cas en direct doivent être préalablement approuvées par l'autorité technique.
 - 6.10 L'entrepreneur doit regrouper les résultats de l'étude de cas réels réalisée par les étudiants dans un document de synthèse qui doit être soumis à l'autorité technique au plus tard un mois après la fin de la formation.
 - 6.11 L'entrepreneur doit concevoir et organiser des examens écrits, des présentations individuelles et en groupe, puis les examiner.
 - 6.12 L'entrepreneur doit remettre un certificat à chaque étudiant à la fin du programme de cours.

7.0 CONTRAINTES

- 7.1 Le programme doit être délivré dans la région de la capitale nationale du Canada.
- 7.2 Il doit être organisé dans une installation du MDN.
- 7.3 La formation doit avoir lieu en semaine, de 7 h à 16 h, et jamais les fins de semaine.
- 7.4 La formation doit être donnée en anglais.
- 7.5 Le programme doit comporter un mélange de cours magistraux, de travaux en groupe, de présentations d'étudiants, d'apprentissage à distance et d'activités.

8.0 ENVIRONNEMENT TECHNIQUE

- 8.1 Le programme se déroulera sur des réseaux non ministériels (p. ex., Internet civil) au moyen d'une connexion Wi-Fi. Les applications Microsoft Office (Outlook, PowerPoint, Word, etc.) doivent être utilisées.

9.0 EXIGENCES EN MATIÈRE DE RAPPORTS

- 9.1 L'entrepreneur doit présenter un rapport d'étape et l'envoyer au responsable technique au quart, milieu et trois quarts du programme. Tous les rapports d'étape doivent contenir au moins les renseignements suivants :
 - (a) toutes les activités importantes réalisées au cours de la période visée susceptibles d'avoir une incidence sur la prestation du programme;
 - (b) l'état de toute activité non terminée qui peut dépasser les délais normaux;

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- (c) toute préoccupation relative à la formation par rapport au rendement des étudiants;
 - (d) toute préoccupation relative au matériel de cours ou à la prestation;
 - (e) la description des problèmes rencontrés qui nécessiteront une attention ou qui pourraient s'aggraver;
 - (f) toute recommandation de mettre à jour ou de changer le calendrier des cours.
- 9.2 Tous les rapports doivent être remis à l'Autorité technique en une (1) copie imprimée et une (1) copie électronique.
- 9.3 Les rapports en version électronique doivent être fournis dans un format accessible (Microsoft Word ou un autre format approuvé par l'autorité technique).
- 10.0 EXIGENCES LINGUISTIQUES**
- 10.1 Les instructeurs doivent maîtriser l'anglais. Par maîtrise, on entend la capacité à communiquer à l'oral et à l'écrit, sans aide et en faisant peu d'erreurs.
- 11.0 DÉPLACEMENTS**
- 11.1 Le déplacement vers le lieu de travail sera aux frais de l'entrepreneur. Les frais de déplacement ne seront pas remboursés séparément. En tant que tel, il incombe à l'entrepreneur de prendre en compte tous les frais liés aux déplacements lors de la présentation de sa soumission.
- 11.2 L'entrepreneur doit prendre les dispositions nécessaires pour l'hébergement, les repas et le transport du ou des instructeurs vers le lieu d'instruction, y compris l'étude de cas réels.
- 12.0 LIEU DE TRAVAIL**
- 12.1 Toutes les instructions doivent être suivies dans les installations du MDN dans la région de la capitale nationale. Aux fins de l'analyse qualitative des études de cas réels, des groupes de discussion et des entretiens peuvent être menés dans un troisième endroit de la région de la capitale nationale. Les frais de déplacement dans la RCN ne seront pas remboursés.

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ANNEXE « B » – BASE DE PAIEMENT

Au cours de la période du contrat et, si les options sont exercées, durant la période de prolongation du contrat, pour les travaux effectués conformément au contrat, l'entrepreneur sera payé comme indiqué ci-dessous.

1. Honoraires professionnels

L'entrepreneur sera payé à des taux fixes tout compris comme suit : (à insérer dans le contrat subséquent)

Cours	Taux horaire ferme tout compris Prix (en \$ CA)	Nombre estimé de cours à donner	Total (dollars canadiens)
	A		B
Période initiale du contrat :			
Coût par série de cours donnée à un maximum de 24 participants.	\$	1	\$
Total pour la période du contrat			\$
Période de prolongation du contrat 1 :			
Coût par série de cours donnée à un maximum de 24 participants.	\$	1	\$
Total pour la période de prolongation du contrat 1			\$
Période de prolongation du contrat 2 :			
Coût par série de cours donnée à un maximum de 24 participants.	\$	1	\$
Total pour la période de prolongation du contrat 2			\$
Prix total évalué (y compris toutes les périodes d'option)			\$

Coût estimatif total (à insérer dans le contrat subséquent)

Période initiale du contrat : _____ \$

Période de prolongation du contrat 1 (si l'option est exercée) : _____ \$

Période de prolongation du contrat 2 (si l'option est exercée) : _____ \$

Coût estimatif total : _____ \$

À l'exception des taux horaires fermes précisés ci-dessus, les montants utilisés dans la présente section de cette annexe ne sont que des estimations. Des changements mineurs à ces estimations pourront être acceptés aux fins de facturation, à mesure que le travail progresse, à la condition que ces changements aient été approuvés au préalable par l'autorité technique, et à la condition que le coût total estimatif du contrat ne dépasse pas la limite des dépenses indiquée à la clause 6.7 du contrat.

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ANNEXE C DE LA PARTIE 3 DE LA DEMANDE DE SOUMISSIONS

INSTRUMENTS DE PAIEMENT ÉLECTRONIQUE

Comme indiqué à la clause 3.1.1 de la Partie 3, le soumissionnaire doit remplir l'information ci-dessous afin d'indiquer quels instruments de paiement électronique sont acceptés pour le paiement de factures.

Le soumissionnaire accepte d'être payé au moyen de l'un des instruments de paiement électronique suivants :

- carte d'achat VISA;
- carte d'achat MasterCard;
- Dépôt direct (national et international);
- Échange de données informatisé (EDI);
- Virement télégraphique (international seulement);
- Système de transfert de paiements de grande valeur (plus de 25 M\$).

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ANNEXE « D » – ENTENTE DE NON-DIVULGATION

(Cette annexe doit être remplie après l'attribution du contrat et ne fait pas partie intégrante de la soumission.)

Je soussigné(e), _____, reconnais que, dans le cadre de mon travail à titre d'employé ou de sous-traitant de _____, je pourrais avoir accès à des renseignements fournis par le Canada ou en son nom relativement aux travaux, en vertu du contrat portant le numéro de série W6369-21-X0008 entre Sa Majesté la Reine du chef du Canada, représentée par le ministère de la Défense nationale et _____, y compris des renseignements confidentiels ou des renseignements exclusifs appartenant à des tiers, ainsi que ceux qui sont conçus, générés ou produits par l'entrepreneur pour l'exécution des travaux. Aux fins de cet accord, ces renseignements comprennent notamment tous les documents, éléments matériels, avis, et toutes les instructions, directives, données ou autres, reçus verbalement, sous forme imprimée, électronique ou autre, et marqués ou non comme exclusifs ou de nature délicate, qui sont divulgués à une personne ou dont une personne prend connaissance pendant l'exécution du contrat.

J'accepte de ne pas reproduire, copier, utiliser, divulguer, diffuser ou publier, en tout ou en partie, de quelque manière ou forme que ce soit les renseignements décrits ci-dessus, sauf si ces renseignements sont requis par une personne employée par le Canada et qui est autorisée à y avoir accès. Je m'engage à protéger les renseignements et à prendre toutes les mesures nécessaires et appropriées, y compris celles énoncées dans toute instruction écrite ou orale publiée par le Canada, pour prévenir la divulgation de ces renseignements ou l'accès à ces renseignements en contravention du présent accord.

Je reconnais également que les renseignements fournis à l'entrepreneur par ou pour le Canada ne doivent être utilisés qu'aux seules fins du contrat et que ces renseignements doivent demeurer la propriété du Canada ou d'un tiers, selon le cas.

Je consens à ce que l'obligation de cette entente survive à la fin du contrat portant le numéro de série : W6369-21-X008.

Signature

Date

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July 10, 2020 7:20 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: RE: Translation request 10269031

Good morning Sir,

The solicitation has been posted with a closing date of 20 Aug 2020.

<https://buyandsell.gc.ca/procurement-data/tender-notice/PW-20-00920078>

Regards,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca / Tel: 819-939-4467

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: July 8, 2020 7:40 PM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Fw: Translation request 10269031

Rob,

Translation attached.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Patricia Gagné <Patricia.Gagne@tpsgc-pwgsc.gc.ca>
Sent: Wednesday, July 8, 2020 3:59 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull; +ADM(PA) Linguistic Services - Service Linguistique@ADM(PA) DGPA@Ottawa-Hull
Subject: Translation request 10269031

Hello,

As requested, here is a copy of the translation:

Patricia Gagné

Traductrice-conseil, Division Finances et Approvisionnement
Bureau de la traduction / Services publics et Approvisionnement Canada
patricia.gagne@tpsgc-pwgsc.gc.ca
Tél. : 819-997-0487

Translator and Language Advisor, Finance and Procurement Division
Translation Bureau / Public Services and Procurement Canada
patricia.gagne@tpsgc-pwsc.gc.ca
Tel.: 819-997-0487

From: [Best RL@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Best_RL@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: July 10, 2020 7:37 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: RE: Translation request 10269031

Good morning Sir,

Further to my last email, are there any vendors you want me to notify of this recent solicitation?

Thank you,

Rob

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: July 8, 2020 7:40 PM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Fw: Translation request 10269031

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Translation attached.

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Sent: Wednesday, July 8, 2020 3:59 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull; +ADM(PA) Linguistic Services - Service Linguistique@ADM(PA) DGPA@Ottawa-Hull
Subject: Translation request 10269031

Hello,

As requested, here is a copy of the translation:

Patricia Gagné

Traductrice-conseil, Division Finances et Approvisionnement
Bureau de la traduction / Services publics et Approvisionnement Canada
patricia.gagne@tps-gc-pwgsc.gc.ca
Tél. : 819-997-0187

Translator and Language Advisor, Finances and Procurement Division
Translation Bureau / Public Services and Procurement Canada
patricia.gagne@tps-gc-pwgsc.gc.ca
Tel.: 819-997-0187

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: July 28, 2020 6:01 PM
To: [White VC@ADM\(PA\) DGPA@Ottawa-Hull](mailto:White.VC@ADM(PA).DGPA@Ottawa-Hull)
Subject: Fw: Actor and Audience Analysis Course

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Sent: Tuesday, July 28, 2020 6:00 PM
To: Filion MM@SMA(AP) BAPDN RQ@Montreal
Subject: Re: Actor and Audience Analysis Course

Hi Micheline. Course is scheduled tentatively start 28 Sep for 6 weeks. We may go with a hybrid model 3weeks DO and 3 weeks on site

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Filion MM@SMA(AP) BAPDN RQ@Montreal
Sent: Tuesday, July 28, 2020 2:00 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: Detilly Capt MCL@SMA(AP) BAPDN RQ@Montreal; White VC@ADM(PA) DGPA@Ottawa-Hull; Crouse T@ADM(PA) DOAS@Ottawa-Hull
Subject: Actor and Audience Analysis Course

Good day LCol – I hope this email finds you well.

Will the Actor and Audience Analysis Course be offered this coming fall? If so, could you share the details, as I am very interested in attending.

Best regards,

Micheline-Marie Filion

Conseillère en communication

Bureau de l'engagement des partenaires stratégiques – Est du Canada @ConnexionDefense

Ministère de la Défense nationale / Gouvernement du Canada

Micheline-Marie.Filion@forces.gc.ca / 514-252-2777 poste 4390 / cell. 514 346 8541

Communication Advisor

Stakeholder Engagement Office – Eastern Canada @ConnexionDefense

Department of National Defence / Government of Canada

Micheline-Marie.Filion@forces.gc.ca / 514-252-2777 ext. 4390 / mob. 514 346 8541

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August-02-19 12:21 PM
To: Salloum LCol AE@C Army DAPA@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>; Morrell LCol DW@CJOC HQ@Ottawa-Hull <DARYL.MORRELL@forces.gc.ca>; Williamson Cdr KL@C Navy DNSM@Ottawa-Hull <Kelly.Williamson@forces.gc.ca>; Neta LCol SC@C Air Force D Air

PA@Ottawa-Hull <Steven.Neta@forces.gc.ca>; Godin LCol SMM@CJOC HQ@Ottawa-Hull
<STEPHANIE.GODIN@forces.gc.ca>; Golbeck LCol BL@ADM(PA) DPAPO@Ottawa-Hull
<BONNIE.GOLBECK@forces.gc.ca>; Apostoliuk LCol HAB@ADM(PA) DPAPO@Ottawa-Hull
<HOLLY.APOSTOLIUK@forces.gc.ca>; Thompson LCol RM@ADM(PA) DPAPO@Ottawa-Hull
<Martell.Thompson@forces.gc.ca>; Doucette LCol PM@CJOC HQ@Ottawa-Hull
<PAUL.DOUCETTE3@forces.gc.ca>; Devenney LCol DA@CDS@Ottawa-Hull
<David.Devenney@forces.gc.ca>; Poirier LCol MLE@CJOC HQ@Ottawa-Hull
<LYNE.POIRIER@forces.gc.ca>; Grover Cdr DH@ADM(PA) DPALC@Ottawa-Hull
<DIANE.GROVER@forces.gc.ca>; Vriniotis LCol G@HQ SACT Norfolk@Washington, US
<GEORGE.VRINIOTIS@forces.gc.ca>; Delaney LCol A@ADM(PA) DGPASP@Ottawa-Hull
<ALLISON.DELANEY@forces.gc.ca>; Allison Maj KL@ADM(PA) DPAPO@Ottawa-Hull
<KENDRAH.ALLISON@forces.gc.ca>; De Mora J@ADM(PA) DGPA@Ottawa-Hull
<JOE.DEMORA@forces.gc.ca>; Keenan JC@ADM(PA) DGMEC@Ottawa-Hull
<JANICE.KEENAN@forces.gc.ca>; Potoczny Col D@CJOC HQ@Ottawa-Hull
<DONALD.POTOCZNY@forces.gc.ca>; Carter Maj CJC@CJOC HQ@Ottawa-Hull
<Christopher.Carter3@forces.gc.ca>; Henderson Col CR@CJOC HQ@Ottawa-Hull
<Christopher.Henderson3@forces.gc.ca>; Sproll LCol NA@CFINTCOM DTRI@Ottawa-Hull
<NORMAN.SPROLL@forces.gc.ca>; Lamarre LCol MC@C Army DLF@Ottawa-Hull
<CAROLYNE.LAMARRE@forces.gc.ca>; Peebles Maj M@ <D-MARK.PEEBLES@forces.gc.ca>; Sproll
LCol NA@CFINTCOM DTRI@Ottawa-Hull <NORMAN.SPROLL@forces.gc.ca>; Chang Maj
FL@IATF@Kingston <Luc.Chang@forces.gc.ca>; White VC@ADM(PA) DGPA@Ottawa-Hull
<VANCE.WHITE@forces.gc.ca>; Salloum LCol AE@C Army DAPA@Ottawa-Hull
<ANDRE.SALLOUM@forces.gc.ca>; Morrell LCol DW@CJOC HQ@Ottawa-Hull
<DARYL.MORRELL@forces.gc.ca>; Luft LCol AJN@CJOC CJWC@Ottawa-Hull
<Alastair.Luft@forces.gc.ca>
Cc: Garcia Capt(N) N@ADM(PA) DPAPO@Ottawa-Hull <Nathalie.Garcia@forces.gc.ca>; Perreault
Col R@ADM(PA) COS(PA)@Ottawa-Hull <RICHARD.PERREULT@forces.gc.ca>; MacNair Maj
DG@CMP CFLS@Ottawa-Hull <DOUGLAS.MACNAIR@forces.gc.ca>; Stewart Maj EJH@ADM(PA)
DPAPO@Ottawa-Hull <Edward.Stewart@forces.gc.ca>
Subject: RE: Update on Actor and Audience Analysis Course

Sir/colleagues

The Directorate of Military Strategic Communications will be holding an advanced Actor and Audience Analysis (AAA) training course this fall. This course trains candidates in the fundamentals of a scientific cross-disciplinary approach to strategic communication and behavior change.

The methodology taught in this training course provides the essential framework for conducting AAA, diagnostic problem solving tools for identifying the most effective strategy of influence, enables accurate and efficient research using qualitative, quantitative and hybrid approaches, it further inculcates practitioners to perform highly effective Strategic Communication Campaigns, and lastly it provides structure to measure the effectiveness of intervention campaigns.

The course will be held from 16 Sep to 1 Nov at the Defence Public Affairs Learning Centre in Gatineau. The course will be 7 weeks in duration, and includes a live case study.

An info session on the course will be held on 7 August in the Malone Room at 1430 for those who are interested. Maj Dave Bowen, who recently attended a Dutch run version of the course, will provide an overview.

There are 24 vacancies available for the course. Nominations, in priority, to me please and are requested NLT 23 August.

D. Allison
LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: [Best RL@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: August 5, 2020 1:03 PM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

I see them now.

Thank you

From: Best RL@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: August 5, 2020 1:02 PM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good afternoon Sir,

There was no text included in your response email.

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: August 5, 2020 11:28 AM
To: Best RL@ADM(Mat).D.Svcs.C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: RE: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

From: Best RL@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: August-05-20 9:36 AM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: FW: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good morning Sir,

I have received the questions below regarding the solicitation for W6369-21-X008.

Please provide answers when available.

Thank you,

Rob

From:
Sent: August 5, 2020 9:28 AM
To: Best RL@ADM(Mat).D.Svcs.C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good morning sir,

I hope this letter finds you well. I had a few questions in regards to the AAA Training Tender. May I direct these to you?

1. Does 'Actor and Audience Analysis Training' (AAA) refer to Military Strategic Communications (StratComs), defined by NATO "the integration of communication capabilities and information staff function with other military activities, in order to

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understand and shape the information environment, in support of NATO strategic aims and objectives," in support of tasks as outlined in the NATO ACO/ACT Public Affairs Handbook 2020? Or, does 'Actor and Audience Analysis Training' (AAA) refer to the training requirement confined to Target Audience Analysis (TAA), defined as "the systematic study of people to enhance understanding and identify accessibility, vulnerability, and susceptibility to behavioural and attitudinal influence" in UK MOD Joint Defence Publication JDP 0-01.1, in support of Full Spectrum Effects (FSE) on deployed operations? More the latter, though this is a UK definition.

2. Is there a requirement to deliver this training in line with the Canadian military's support to NATO activity under NATO Allied Joint Publications AJP-3.10: Allied Joint Doctrine for Information Operations, AJP-3.10.1: Allied Joint Doctrine for Psychological Operations, and AJP-5: Allied Joint Doctrine for the Planning of Operations? NO, but successful candidates will be able to contribute to these capabilities/planning on deployed ops..
3. Is there a requirement to deliver training that supports J3/5 activity at the Operational/Tactical Theatre Commander's level (AJP-3.10.1 5-2) and is there an expectation to teach PSYOPS Planning Outputs (AJP-3.10.1 4-2 Annex 5B)? To the former, yes. No expectation for PSYOPS planning Outputs
4. Is there a requirement to deliver training that is focused on PSYOPS effects delivery (AJP-3.10.1 4-2), or in line with US Army Training Pamphlet ATP 3-13.1: The Conduct of Information Operations? No
5. Is there a thematic focus for the training (for example, under the NATO Crisis Response Planning Process [AJP-3.10.1 Annex 5A] or counterterrorism/counter-insurgency operations)? Candidates will be presented with a real life case study for research.
6. Is there requirement for a sociological focus including Human Terrain Analysis (HTA)?
No

Thank you for your assistance.
Sincerely,

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 12, 2020 8:52 AM
To: [Best RL@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Re: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Hopefully not for too long

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [Best RL@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: Wednesday, August 12, 2020 8:26 AM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good morning Sir,

FYI, there appears to be a delay in the translation of the Q & A. This may result in an extension of the solicitation.

August 10th 2020 - Update

Please note that we are currently experiencing technical difficulties which may affect the speed of the Online Ordering System and result in delays in processing your request. The Translation Bureau continues to provide service to the Parliament of Canada, the federal government and its other clients. All translation, interpretation and terminology services in official, foreign and Indigenous languages, as well as sign language interpretation and captioning services remain available according to the usual procedures (hyperlink accessible only on the Government of Canada network).

In accordance with directives from public health authorities, the Translation Bureau would like to limit travel to and from the office to employees who provide critical services only. Secret, Confidential and Protected C requests will continue to be processed in the usual timely manner, but since employees need to be at the office to do so, please ensure that you code these requests under the appropriate security clearance level.

Regards,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 6, 2020 11:17 AM
To: [Best RL@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D.Svcs.C@Ottawa-Hull) <Robert.Best@forces.gc.ca>
Subject: Re: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Rob, GTG

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Thursday, August 6, 2020 10:46 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: FW: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good morning Sir,

I would like to confirm that the proposed responses I forwarded you yesterday are acceptable as I will need to have them translated and posted as an official amendment to this solicitation.

Thank you,

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
robert.best@forces.gc.ca

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August 5, 2020 1:15 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good afternoon Sir,

Are these answers suitable?

Q1 Does 'Actor and Audience Analysis Training' (AAA) refer to Military Strategic Communications (StratComs), defined by NATO "the integration of communication capabilities and information staff function with other military activities, in order to understand and shape the information environment, in support of NATO strategic aims and objectives," in support of tasks as outlined in the NATO ACO/ACT Public Affairs Handbook 2020? Or, does 'Actor and Audience Analysis Training' (AAA) refer to the training requirement confined to Target Audience Analysis (TAA), defined as "the systematic study of people to enhance understanding and identify accessibility, vulnerability, and susceptibility to behavioural and attitudinal influence" in UK MOD Joint Defence Publication JDP 0-01.1, in support of Full Spectrum Effects (FSE) on deployed operations?

A1 'Actor and Audience Analysis Training' (AAA) refers to the training requirement confined to Target Audience Analysis (TAA), defined as "the systematic study of people to enhance understanding and identify accessibility, vulnerability, and susceptibility to behavioural and attitudinal influence".

Q2 Is there a requirement to deliver this training in line with the Canadian military's support to NATO activity under NATO Allied Joint Publications AJP-3.10: Allied Joint Doctrine for information Operations, AJP-3.10.1: Allied Joint Doctrine for Psychological Operations, and AJP-5: Allied Joint Doctrine for the Planning of Operations?

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A2 No.

Q3 Is there a requirement to deliver training that supports J3/5 activity at the Operational/Tactical Theatre Commander's level (AJP-3.10.1 5-2)?

A3 Yes.

Q4 Is there an expectation to teach PSYOPS Planning Outputs (AJP-3.10.1 4-2 Annex 5B)?

A4 No.

Q5 Is there a requirement to deliver training that is focused on PSYOPS effects delivery (AJP-3.10.1 4-2), or in line with US Army Training Pamphlet ATP 3-13.1: The Conduct of Information Operations?

A5 No.

Q6 Is there a thematic focus for the training (for example, under the NATO Crisis Response Planning Process [AJP-3.10.1 Annex 5A] or counterterrorism/counter-insurgency operations)?

A6 Candidates must be presented with a real life case study for research.

Q7 Is there requirement for a sociological focus including Human Terrain Analysis (HTA)?

A7 No.

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 5, 2020 11:28 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: RE: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-05-20 9:36 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: FW: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

Good morning Sir,

I have received the questions below regarding the solicitation for W6369-21-X008.

Please provide answers when available.

Thank you,

Rob

From:
Sent: August 5, 2020 9:28 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Enquiry into Tender for Actor and Audience Analysis (AAA) Training (W6369-21-X008)

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Good morning sir,

I hope this letter finds you well. I had a few questions in regards to the AAA Training Tender. May I direct these to you?

1. Does 'Actor and Audience Analysis Training' (AAA) refer to Military Strategic Communications (StratComs), defined by NATO "the integration of communication capabilities and information staff function with other military activities, in order to understand and shape the information environment, in support of NATO strategic aims and objectives," in support of tasks as outlined in the NATO ACO/ACT Public Affairs Handbook 2020? Or, does 'Actor and Audience Analysis Training' (AAA) refer to the training requirement confined to Target Audience Analysis (TAA), defined as "the systematic study of people to enhance understanding and identify accessibility, vulnerability, and susceptibility to behavioural and attitudinal influence" in UK MOD Joint Defence Publication JDP 0-01.1, in support of Full Spectrum Effects (FSE) on deployed operations? More the latter, though this is a UK definition.
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3. Is there a requirement to deliver training that supports J3/5 activity at the Operational/Tactical Theatre Commander's level (AJP-3.10.1 5-2) and is there an expectation to teach PSYOPS Planning Outputs (AJP-3.10.1 4-2 Annex 5B)? To the former, yes. No expectation for PSYOPS planning Outputs
4. Is there a requirement to deliver training that is focused on PSYOPS effects delivery (AJP-3.10.1 4-2), or in line with US Army Training Pamphlet ATP 3-13.1: The Conduct of Information Operations? No
5. Is there a thematic focus for the training (for example, under the NATO Crisis Response Planning Process [AJP-3.10.1 Annex 5A] or counterterrorism/counter-insurgency operations)? Candidates will be presented with a real life case study for research.
6. Is there requirement for a sociological focus including Human Terrain Analysis (HTA)?
No

Thank you for your assistance.

Sincerely,

Page 1477

**is withheld pursuant to section
est retenue en vertu de l'article**

20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 13, 2020 9:08 PM
To: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Audience Research Course - Call for nominees

As always, you guys rock. Thank you my friend.

From: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August-13-20 8:55 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Audience Research Course - Call for nominees

Sir, plse see attached Eng and Fre full version. The French translation was provided by PSPC.

Plse let me know if there is anything else we can do to assist.

V/R
Doug

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 13, 2020 3:37 PM
To: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull) <Doug.Keirstead@forces.gc.ca>
Subject: FW: Audience Research Course - Call for nominees

Doug,

See below from BGen Janzen.

We are facing significant delay times for translation. I want to send this out as a heads up for the upcoming course. Could Annie do a quick translate of a portion of the text below so that I could meet this aim?

From: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August-13-20 3:32 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>; [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull) <Doug.Keirstead@forces.gc.ca>
Subject: RE: Audience Research Course - Call for nominees

Maybe ask someone on Maj K's team to make 20% French, and send it as a bilingual text?

Brigadier-General Jay H. Janzen

Director-General Military Public Affairs
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces / Government of Canada
Jay.Janzen@forces.gc.ca / Telephone: 613-901-4808 / Cellular: 613-617-4585

Directeur général – Affaires publiques militaires
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes / Gouvernement du Canada
Jay.Janzen@forces.gc.ca / Téléphone: 613-901-4808 / Cellulaire: 613-617-4585

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 13, 2020 3:26 PM

To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: RE: Audience Research Course - Call for nominees

Sir, ack the changes.

I intend this to be an un-official heads up to adds to alert and scope potential interest. There is a significant backlog for translation right now: I will get it translated and sent out via official channels, but if we wait we will likely be into September before I can send it...PA net is a good alerting mechanism. Recommend I proceed this way and follow up with official, bilingual version.

From: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull
Sent: August-13-20 2:44 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Audience Research Course - Call for nominees

Some minor changes. Recommend we send a bilingual version.

Brigadier-General Jay H. Janzen

Director-General Military Public Affairs
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces / Government of Canada
Jay.Janzen@forces.gc.ca / Telephone: 613-901-4808 / Cellular : 613-617-4585

Directeur général – Affaires publiques militaires
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes / Gouvernement du Canada
Jay.Janzen@forces.gc.ca / Téléphone: 613-901-4808 / Cellulaire : 613-617-4585

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 13, 2020 2:20 PM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: Audience Research Course - Call for nominees

Sir,

As sent to you earlier, no problem with TD funds according to Kris. Accordingly, I will send this out today.

Audience Research is an intensive training program delivered once a year via a contractor in the National Capital Region. This year training will occur in a hybrid or distance learning (DL) environment, depending on the extant COVID-19 guidance. It is scheduled to run for 6 weeks beginning on 28 Sep, with the first three week block delivered through DL. Depending on covid-19 constraints, the second three week block may be delivered at DPALC in Gatineau, or completed through DL. The contractor will deliver training in English, but staff will work to provide materials and assistance in French.

Through a combination of course readings, interactive lectures, case studies and guided discussions, candidates will first learn the basic psychology, research design and the science behind behavior and perception, followed by an internationally recognized audience research and campaign planning methodology. This will be followed by operational applications, semiotic analysis, cultural perspective analysis, and application to a real life case study, with results delivered to CAF leadership.

The DPALC is an internationally recognized training and development establishment serving the needs of the Canadian Armed Forces (CAF) and the Department of National Defence (DND). It is located in Gatineau, Quebec, adjacent to the capital city of Ottawa, Ontario. Regular and Reserve Force members of the CAF, government employees and international military personnel regularly attend the DPALC for training in the areas of military public affairs, social media, communication products, photojournalism, media relations, crisis communications and, StratCom.

Should the second three-week portion be delivered in-person in Gatineau, there are TD funds available for those candidates from outside the NCR. No CI B funding is available.

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 14, 2020 9:39 AM
To: jean.tessier@pco-bcp.gc.ca
Subject: Fw: Audience research Course - Request for nominees
Attachments: Audience Research Course.docx

Jean, I sent this to Shane but his reply stated he has moved. This is the second iteration of the course you visited last year. Should you wish to nominate someone, we would look favorably on it.

Cheers, Doug

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Sent: Friday, August 14, 2020 8:06 AM
To: MacNair LCol DG@C Army DAPA@Ottawa-Hull; Lawrence Maj JA@C Air Force D Air PA@Ottawa-Hull; Apostoliuk LCol HAB@ADM(PA) DPAPO@Ottawa-Hull; Allison LCol KL@CJOC HQ@Ottawa-Hull; Devenney LCol DA@CDS@Ottawa-Hull; Grover Cdr DH@ADM(PA) DPALC@Ottawa-Hull; Perreault Col R@ADM(PA) COS(PA)@Ottawa-Hull; eric chamberland; Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull; Hazen DG@ADM(S&T) DGSTJFD@Ottawa-Hull; Diaczuk, Shane; Deneau LCol ED@CJOC HQ@Ottawa-Hull; Gault Maj AB@PSTC@Kingston; Leclerc-Desjardins LCol GENY@SJS DCO@Ottawa-Hull; Watson Q@ADM(PA) DOAS@Ottawa-Hull; Smyth Maj TA@ADM(PA) DPAPO@Ottawa-Hull; Stanford A@ADM(PA) DGMEC@Ottawa-Hull; Powell, Jamie Maj (77X-CGP-COS); Golbeck LCol BL@CJOC HQ@Ottawa-Hull; Delaney, Allison; Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull
Cc: Bineau Maj AL@CANSOFCOM@Ottawa-Hull
Subject: Audience research Course - Request for nominees

Colleagues/mes amis,

Audience Research is an intensive training program delivered once a year via a contractor in the National Capital Region. This year training will occur in a hybrid or distance learning (DL) environment, depending on the extant COVID-19 guidance. It is scheduled to run for 6 weeks beginning on 28 Sep, with the first three week block delivered through DL. Depending on covid-19 constraints, the second three week block may be delivered at DPALC in Gatineau, or completed through DL. The contractor will deliver training in English, but staff will work to provide materials and assistance in French.

Through a combination of course readings, interactive lectures, case studies and guided discussions, candidates will first learn the basic psychology, research design and the science behind behavior and perception, followed by an internationally recognized audience research and campaign planning methodology. This will be followed by operational applications, semiotic analysis, cultural perspective analysis, and application to a real life case study, with results delivered to CAF leadership.

The DPALC is an internationally recognized training and development establishment serving the needs of the Canadian Armed Forces (CAF) and the Department of National Defence (DND). It is located in Gatineau, Quebec, adjacent to the capital city of Ottawa, Ontario. Regular and Reserve Force members of the CAF, government employees and international military personnel regularly attend the DPALC for training in the areas of military public affairs, social media, communication products, photojournalism, media relations, crisis communications and StratCom.

Should the second three-week portion be delivered in-person in Gatineau, there are TD funds available for those candidates from outside the NCR. No CI B funding is available.

Audience Research (recherche sur le public) est un programme de formation intensif qui est donné une fois par année par un entrepreneur de la région de la capitale nationale. Cette année, la formation sera dispensée dans un environnement d'apprentissage à distance (AD) ou selon une formule hybride, conformément aux directives sur la COVID-19 en vigueur. La formation devrait durer six semaines, à compter du 28 septembre. Un premier bloc de trois semaines sera donné dans un environnement d'AD. Selon les contraintes liées à la COVID-19, le deuxième bloc de trois semaines pourra être dispensé au Centre d'apprentissage des Affaires publiques de la Défense (CAAPD) à Gatineau ou dans un environnement d'AD. Le fournisseur donnera la formation en anglais, mais le personnel se chargera de fournir du matériel et de l'aide en français.

Au moyen d'une combinaison de lectures préalables, d'exposés interactifs, d'études de cas et de discussions guidées, les candidats se familiariseront d'abord avec des notions de base en psychologie, la conception de la recherche et les fondements scientifiques du comportement et de la perception, puis avec une méthode de recherche sur le public et de planification de campagne reconnue à l'échelle internationale. Cela sera suivi par des applications opérationnelles, une analyse sémiotique, une analyse des perspectives culturelles et une application à une étude de cas réelle, dont les résultats seront présentés aux dirigeants des Forces armées canadiennes (FAC).

Le CAAPD est un établissement de formation et de perfectionnement reconnu à l'échelle internationale qui répond aux besoins des Forces armées canadiennes (FAC) et du ministère de la Défense nationale (MDN). Il est situé à Gatineau, au Québec, à côté de la capitale nationale, Ottawa, en Ontario. Les membres de la Force régulière et de la Force de réserve des FAC, les fonctionnaires et les militaires étrangers se rendent régulièrement au CAAPD pour y suivre de la formation dans les domaines des affaires publiques militaires, des médias sociaux, des produits de communication, du photojournalisme, des relations avec les médias, des communications en situation de crise et des communications stratégiques.

Si le deuxième bloc de trois semaines est dispensé en personne à Gatineau, des fonds ST seront disponibles pour les candidats de l'extérieur de la région de la capitale nationale. Aucun financement n'est prévu pour les réservistes en service de classe B.

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-901-4697 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

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From: Mehan CWO BW@C Navy DNIW@Ottawa-Hull
Sent: August 14, 2020 12:28 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Strat Comm Enablers and TAA Coursing

Hi Sir. Hope all is well with you and your family

Are the subject courses being provided by DPALC this year?

Thank You

Chief Warrant Officer/ Adjudant-chef Blair Mehan

Director Naval Information Warfare Chief Warrant Officer
Canadian Armed Forces
Blair.mehan2@forces.gc.ca / Tel: 613-904-9658 / Cell: 819-712-3532

Adjudant-chef du Directeur - Guerre de l'information de la Marine
Forces armées canadiennes
Blair.mehan2@forces.gc.ca / Tél: 613-904-6958 / Cell: 819-712-3532

« FACTA NON VERBA »

From: Meister.Maj.D@2.Cdn.Air.Div.HQ.PA@Winnipeg
Sent: August 20, 2020 12:56 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: Audience research Course - Request for nominees

Good Afternoon Sir,

Can you advise if course participation is primarily PAO's or is it more like the Strat Comms Course that is more operationally focussed?

I am think of sharing with the D Air Res folks as it may of interest to those running the Air Reserve recruiting cell – but if this is more PAO-focussed, likely not a good fit.

Thoughts?

Dave

Major David Meister

Senior Public Affairs Officer,
2 Canadian Air Division Headquarters Canadian Armed Forces
David.Meister@forces.gc.ca
Telephone 204-833-2500 ext 3020 / CSN 257-3020 BB: 204-471-5222

Officier supérieur des affaires publiques,
Quartier général de la 2e Division aérienne du Canada Forces armées canadiennes
David.Meister@forces.gc.ca
Téléphone 204-833-2500 poste 3020 / RCCC 257-3020 BB: 204-471-5222

From: [Stutt.Maj.DR@ADM\(PA\).COS\(PA\)@Ottawa-Hull](mailto:Stutt.Maj.DR@ADM(PA).COS(PA)@Ottawa-Hull)
Sent: August 18, 2020 10:18 AM
Subject: FW: Audience research Course - Request for nominees

FYI

Note that LCol Allison does not have funds to sp Class B salary. Units would need to fund this.

Dennis Stutt
Major
Group des affaires publiques militaires (la Force de reserve)
National Defence | Défense nationale
dennis.stutt@forces.gc.ca |

Dennis Stutt
Major
Military Public Affairs Group (Reserve Force)
National Defence | Défense nationale
dennis.stutt@forces.gc.ca |

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From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 21, 2020 12:41 PM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: RE: Closing date

Thx.

From: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-21-20 11:14 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Closing date

Good morning Sir,

The closing date for solicitation W6369-21-X008 is 27 August.

Regards,

Rob

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: August 21, 2020 10:55 AM
To: Best RL@ADM(Mat) D Svcs C@Ottawa-Hull <Robert.Best@forces.gc.ca>
Subject: Closing date

Hi Rob,

Hope this e-mail finds you and your family safe and well.

Do we have any awareness of what the closing date for bidders will be?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 21, 2020 5:24 PM
To: [Keirstead Maj DJ@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Keirstead.Maj.DJ@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Re: Audience research Course - Request for nominees

Nema problema my NATO friend.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Keirstead Maj DJ@ADM(PA) DPAPO@Ottawa-Hull
Sent: Friday, August 21, 2020 4:21 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: Audience research Course - Request for nominees

Sir, the boss has me working to bring Capt Mark Ruban on the team in a Class B capacity, which would assist us greatly in light of the several gapped Capt positions. I am still working this out, but in the meantime, can you pencil him in for this one?

Thanks in advance for your support.

V/R
Doug

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 14, 2020 8:06 AM
To: MacNair LCol DG@C Army DAPA@Ottawa-Hull <DOUGLAS.MACNAIR@forces.gc.ca>; Lawrence Maj JA@C Air Force D Air PA@Ottawa-Hull <Jill.Lawrence@forces.gc.ca>; Apostoliuk LCol HAB@ADM(PA) DPAPO@Ottawa-Hull <HOLLY.APOSTOLIUK@forces.gc.ca>; Allison LCol KL@CJOC HQ@Ottawa-Hull <KENDRAH.ALLISON@forces.gc.ca>; Devenney LCol DA@CDS@Ottawa-Hull <David.Devenney@forces.gc.ca>; Grover Cdr DH@ADM(PA) DPALC@Ottawa-Hull <DIANE.GROVER@forces.gc.ca>; Perreault Col R@ADM(PA) COS(PA)@Ottawa-Hull <RICHARD.PERREAULT@forces.gc.ca>; eric chamberland <chamberland@outlook.com>; Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>; Hazen DG@ADM(S&T) DGSTJFD@Ottawa-Hull <David.Hazen@forces.gc.ca>; Diaczuk, Shane <Shane.Diaczuk@pco-bcp.gc.ca>; Deneau LCol ED@CJOC HQ@Ottawa-Hull <ERIK.DENEAU@forces.gc.ca>; Gault Maj AB@PSTC@Kingston <ANDREW.GAULT@forces.gc.ca>; Leclerc-Desjardins LCol GENY@SJS DCO@Ottawa-Hull <YOANN.LECLERC-DESJARDINS@forces.gc.ca>; Watson Q@ADM(PA) DOAS@Ottawa-Hull <QUINN.WATSON@forces.gc.ca>; Smyth Maj TA@ADM(PA) DPAPO@Ottawa-Hull <TRAVIS.SMYTH@forces.gc.ca>; Stanford A@ADM(PA) DGMEC@Ottawa-Hull <ALEX.STANFORD@forces.gc.ca>; Powell, Jamie Maj (77X-CGP-COS) <Jamie.Powell401@mod.gov.uk>; Golbeck LCol BL@CJOC HQ@Ottawa-Hull <BONNIE.GOLBECK@forces.gc.ca>; Delaney, Allison <Allison.Delaney@pco-bcp.gc.ca>; Bowen Maj D@ADM(PA) DGPA@Ottawa-Hull <Dave.Bowen@forces.gc.ca>
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3291

s.19(1)

From: [Godin Col SMM@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Godin.Col.SMM@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 24, 2020 1:11 PM
To: [Thomson LCol AE@C Air Force D Air PA@Ottawa-Hull](mailto:Thomson.LCol.AE@C.Air.Force.D.Air.PA@Ottawa-Hull)
Subject: FW: Audience research Course - Request for nominees
Attachments: Audience Research Course.docx; RE: Actor Audience Course

Adam,

This is the course BGen Janzen wanted to see one of your Captains attend. Can you confirm that will be attending? Thanks.

Colonel Stéphanie Godin

Director Military Public Affairs
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Affaires publiques militaires
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Salloum LCol AE@ADM(PA).DPAPO@Ottawa-Hull
Sent: August 14, 2020 8:52 AM
To: Thomson LCol AE@C Air Force D Air PA@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>; Kent Maj CI@C Air Force D Air PA@Ottawa-Hull <CYNTHIA.KENT@forces.gc.ca>; James Cdr DM@ADM(PA).DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>; Smyth Maj TA@ADM(PA).DPAPO@Ottawa-Hull <TRAVIS.SMYTH@forces.gc.ca>; Bresolin LCdr JS@VCDS CF MP Gp HQ@Ottawa-Hull <JAMES.BRESOLIN@forces.gc.ca>; Bineau Maj AL@CANSOFCOM@Ottawa-Hull <AMBER.BINEAU2@forces.gc.ca>; Stadnyk Maj JC@ADM(PA).Combat.Camera@Ottawa-Hull <Jennifer.Stadnyk@forces.gc.ca>; Noel Maj DP@ADM(PA).DPAPO@Ottawa-Hull <Dennis.Noel@forces.gc.ca>; Fifield LCdr MJ@ADM(PA).DPAPO@Ottawa-Hull <Mark.Fifield@forces.gc.ca>; Holder LCdr JB@C Navy DNSM@Ottawa-Hull <Jordan.Holder@forces.gc.ca>; Carr LCol HC@C Army DAPA@Ottawa-Hull <HOPE.CARR2@forces.gc.ca>; Godin Col SMM@ADM(PA).DPAPO@Ottawa-Hull <STEPHANIE.GODIN@forces.gc.ca>; Blouin D@ADM(PA).DPAPI@Ottawa-Hull <DANIEL.BLOUIN@forces.gc.ca>; Kasper CC@ADM(PA).DPAPO@Ottawa-Hull <CHRISTINA.KASPER@forces.gc.ca>; Martell.THOMPSON@shape.nato.int; Doucette LCol PM@CDLS(W).Public.Affairs@Washington,US <PAUL.DOUCETTE3@forces.gc.ca>
Cc: Keirstead Maj DJ@ADM(PA).DPAPO@Ottawa-Hull <Doug.Keirstead@forces.gc.ca>; eric chamberland >
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ALCON,

FYSA.

-AES

s.19(1)

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D. Allison
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3291

s.19(1)

From: Thomson LCol AE@C Air Force D Air PA@Ottawa-Hull
Sent: August 24, 2020 1:16 PM
To: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: Audience research Course - Request for nominees

Hello Ma'am,

Yes I can confirm that is ready to attend. We are just waiting for the call for nominations IOT get her course loaded.

Depending on the number of seats on the course, we may have another nomination (Capt on Class B for RCAF 2024 Centennial) but we are still discussing whether this is manageable for the team.

Hope you had a restful break.
Adam

From: Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 24, 2020 1:12 PM
To: Thomson LCol AE@C Air Force D Air PA@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>
Subject: FW: Audience research Course - Request for nominees

Adam,

This is the course BGen Janzen wanted to see one of your Captains attend. Can you confirm that will be attending? Thanks.

Colonel Stéphanie Godin

Director Military Public Affairs
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces

Directrice – Affaires publiques militaires
Sous-ministre Adjoint (Affaires publiques)
Forces armées canadiennes

Stephanie.Godin@forces.gc.ca | 613-790-2735 / 613-901-3764

From: Salloum LCol AE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 14, 2020 8:52 AM
To: Thomson LCol AE@C Air Force D Air PA@Ottawa-Hull <ADAM.THOMSON2@forces.gc.ca>; Kent Maj CI@C Air Force D Air PA@Ottawa-Hull <CYNTHIA.KENT@forces.gc.ca>; James Cdr DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>; Smyth Maj TA@ADM(PA) DPAPO@Ottawa-Hull <TRAVIS.SMYTH@forces.gc.ca>; Bresolin LCdr JS@VCDS CF MP Gp HQ@Ottawa-Hull <JAMES.BRESOLIN@forces.gc.ca>; Bineau Maj AL@CANSOFCOM@Ottawa-Hull <AMBER.BINEAU2@forces.gc.ca>; Stadnyk Maj JC@ADM(PA) Combat Camera@Ottawa-Hull <Jennifer.Stadnyk@forces.gc.ca>; Noel Maj DP@ADM(PA) DPAPO@Ottawa-Hull <Dennis.Noel@forces.gc.ca>; Fifield LCdr MJ@ADM(PA) DPAPO@Ottawa-Hull <Mark.Fifield@forces.gc.ca>; Holder LCdr JB@C Navy DNSM@Ottawa-Hull <Jordan.Holder@forces.gc.ca>; Carr LCol HC@C Army DAPA@Ottawa-Hull <HOPE.CARR2@forces.gc.ca>; Godin Col SMM@ADM(PA) DPAPO@Ottawa-Hull

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s.19(1)

<STEPHANIE.GODIN@forces.gc.ca>; Blouin D@ADM(PA) DPAPI@Ottawa-Hull
<DANIEL.BLOUIN@forces.gc.ca>; Kasper CC@ADM(PA) DPAPO@Ottawa-Hull
<CHRISTINA.KASPER@forces.gc.ca>; Martell.THOMPSON@shape.nato.int; Doucette LCol
PM@CDLS(W) Public Affairs@Washington, US <PAUL.DOUCETTE3@forces.gc.ca>
Cc: Keirstead Maj DJ@ADM(PA) DPAPO@Ottawa-Hull <Doug.Keirstead@forces.gc.ca>; eric
chamberland <
>
Subject: FW: Audience research Course - Request for nominees

ALCON,

FYSA.

-AES

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August 14, 2020 8:06 AM
To: MacNair LCol DG@C Army DAPA@Ottawa-Hull <DOUGLAS.MACNAIR@forces.gc.ca>; Lawrence
Maj JA@C Air Force D Air PA@Ottawa-Hull <Jill.Lawrence@forces.gc.ca>; Apostoliuk LCol
HAB@ADM(PA) DPAPO@Ottawa-Hull <HOLLY.APOSTOLIUK@forces.gc.ca>; Allison LCol KL@CJOC
HQ@Ottawa-Hull <KENDRAH.ALLISON@forces.gc.ca>; Devenney LCol DA@CDS@Ottawa-Hull
<David.Devenney@forces.gc.ca>; Grover Cdr DH@ADM(PA) DPALC@Ottawa-Hull
<DIANE.GROVER@forces.gc.ca>; Perreault Col R@ADM(PA) COS(PA)@Ottawa-Hull
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>; Salloum
LCol AE@ADM(PA) DPAPO@Ottawa-Hull <ANDRE.SALLOUM@forces.gc.ca>; Hazen
DG@ADM(S&T) DGSTJFD@Ottawa-Hull <David.Hazen@forces.gc.ca>; Diaczuk, Shane
<Shane.Diaczuk@pco-bcp.gc.ca>; Deneau LCol ED@CJOC HQ@Ottawa-Hull
<ERIK.DENEAU@forces.gc.ca>; Gault Maj AB@PSTC@Kingston <ANDREW.GAULT@forces.gc.ca>;
Leclerc-Desjardins LCol GENY@SJS DCO@Ottawa-Hull <YOANN.LECLERC-
DESJARDINS@forces.gc.ca>; Watson Q@ADM(PA) DOAS@Ottawa-Hull
<QUINN.WATSON@forces.gc.ca>; Smyth Maj TA@ADM(PA) DPAPO@Ottawa-Hull
<TRAVIS.SMYTH@forces.gc.ca>; Stanford A@ADM(PA) DGMEC@Ottawa-Hull
<ALEX.STANFORD@forces.gc.ca>; Powell, Jamie Maj (77X-CGP-COS)
<Jamie.Powell401@mod.gov.uk>; Golbeck LCol BL@CJOC HQ@Ottawa-Hull
<BONNIE.GOLBECK@forces.gc.ca>; Delaney, Allison <Allison.Delaney@pco-bcp.gc.ca>; Bowen Maj
D@ADM(PA) DGPA@Ottawa-Hull <Dave.Bowen@forces.gc.ca>
Cc: Bineau Maj AL@CANSOFCOM@Ottawa-Hull <AMBER.BINEAU2@forces.gc.ca>
Subject: Audience research Course - Request for nominees

Colleagues/mes amis,

Audience Research is an intensive training program delivered once a year via a contractor in the National Capital Region. This year training will occur in a hybrid or distance learning (DL) environment, depending on the extant COVID-19 guidance. It is scheduled to run for 6 weeks beginning on 28 Sep, with the first three week block delivered through DL. Depending on covid-19 constraints, the second three week block may be delivered at DPALC in Gatineau, or completed through DL. The contractor will deliver training in English, but staff will work to provide materials and assistance in French.

Through a combination of course readings, interactive lectures, case studies and guided discussions, candidates will first learn the basic psychology, research design and the science behind behavior and perception, followed by an internationally recognized audience research and campaign planning methodology. This will be followed by operational applications, semiotic

analysis, cultural perspective analysis, and application to a real life case study, with results delivered to CAF leadership.

The DPALC is an internationally recognized training and development establishment serving the needs of the Canadian Armed Forces (CAF) and the Department of National Defence (DND). It is located in Gatineau, Quebec, adjacent to the capital city of Ottawa, Ontario. Regular and Reserve Force members of the CAF, government employees and international military personnel regularly attend the DPALC for training in the areas of military public affairs, social media, communication products, photojournalism, media relations, crisis communications and StratCom.

Should the second three-week portion be delivered in-person in Gatineau, there are TD funds available for those candidates from outside the NCR. No CI B funding is available.

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3291

From: [Best.RL@ADM\(Mat\).D Svcs C@Ottawa-Hull](mailto:Best.RL@ADM(Mat).D Svcs C@Ottawa-Hull)
Sent: August 26, 2020 12:23 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: W6369-21-X008 Actor and Audience Analysis Training
Attachments: W6369-21-X008 Non-Disclosure Certification.pdf; Instructions on Bid Handling.pdf

Good afternoon Sir,

In anticipation of solicitation W6369-21-X008 AAA Training closing tomorrow (Thursday August 27th @ 2pm) please find attached the following documents:

Instructions on Bid Handling: please ensure that each member of the Bid Evaluation Team reads this; and

Conflict of Interest and Non-Disclosure Agreement: this document needs to be completed and signed (electronic signatures are acceptable) by each member of the Bid Evaluation Team and sent to the undersigned prior to releasing the bids for evaluation.

It is recommend that your Bid Evaluation Team be comprised of a minimum of three members (including the Technical Authority) and must be public servants (no contractors).

Further instructions and evaluation documents to follow once the bid solicitation period ends.

Thank you for your assistance in this matter.

Regards,

Rob

Rob Best

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-3-4
Department of National Defence / Government of Canada
robert.best@forces.gc.ca

Agent principal d'approvisionnement, Direction – Contrats de services, DC Svcs 4-3-4
Ministère de la Défense nationale / Gouvernement du Canada
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