GENDER REPRESENTATION AND DIVERSITY CONSULTATION GROUP: SUMMARY REPORT

Schedule O
Canadian Armed Forces (CAF)/Department of National Defence (DND)
Sexual Misconduct Class Action Settlement

June 2021

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Glossary

Consultation Group

Consists of nine members representing three stakeholder groups for Schedule O: three Class members, three Defence Team representatives, and three Subject Matter Experts.

Representatives

Six members of the Consultation Group that represent the Defence Team and Class members.

Roadmap(s)

The outcome recommendation reports created by the Subject Matter Experts.

Executive Summary

On 26 November 2019, the Government of Canada (Canadian Armed Forces and Department of National Defence) agreed to the Final Settlement Agreement (FSA) of the Heyder-Beattie Class Action. The settlement acknowledged that members of the Canadian Armed Forces, "experienced sexual harassment, sexual assault, and/or discrimination on the grounds of sex, gender, gender identity or sexual orientation in connection with their military service."[1] Some public service employees were also recognized as being survivors of sexual assault, harassment, and/or discrimination. The settlement agreement included, among other measures, a commitment for the Canadian Armed Forces to conduct Consultations for Gender Representation and Diversity (Schedule O).

This Executive Summary provides an overview of the outcome of the Schedule O consultation process: three recommendation reports from Subject Matter Experts that are intended to improve gender representation, diversity, and inclusion in the Canadian Armed Forces. The focus of these recommendations were based on a Needs Assessment conducted by the Consultation Group, and informed by the lived experiences of Class and Defence Team representatives. Subject Matter Experts also leveraged their expertise, industry best practices, and research to inform the recommendations developed.

The Needs Assessment of the consultations identified three themes of focus: Workplace Support, Leadership Accountability, and Education. These themes were addressed by the three Subject Matter Expert roadmaps calling for a redesign of the military workplace, critical appraisal of the CAF career cycle, and a standalone education program. These recommendations are mutually reinforcing; in order to assess and guide leadership to hone inclusive skills and traits, improved education is required. To assess and implement policies and programming that support equity-seeking groups, Canadian Armed Forces members and leadership must have improved knowledge and awareness of the ways in which biases and systemic barriers can impede personnel wellbeing and potentially impact various career milestones.

> **On 30 April 2021, DND/CAF announced that we are on a new path to ensuring we respect the dignity of all persons, at all times and under all circumstances.**
> - *CDS/DM Initiating Directive for Professional Conduct and Culture*

Early in the consultative process, the Consultation Group members agreed that the intent and scope of the recommendations were not explicitly to assess Employment Equity goals. Rather, the group agreed on the need to identify larger cultural challenges, and tangible recommendations that could be implemented to begin addressing the systemic and "legacy barriers" to culture change. In doing so, the Consultation Group agreed that recommendations should set the necessary conditions for a more equitable, inclusive, and enabling Canadian Armed Forces, rather than focusing on increasing the numerical representation through short-term initiatives. To this end, the following summarizes the focus areas of the three recommendation reports:[2]

Recommendation One: Redesign the Canadian Armed Forces Workplace to Enable Culture Change

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[1] Sherry Heyder, Amy Graham and Nadine Schultz-Nielsen and The Attorney General of Canada, and Larry Beattie and The Attorney General of Canada, *Final Settlement Agreement* (2019): 1.

[2] Recommendation Reports can be found in full in Part Two.

The exceptional nature of military work has historically been exclusionary or discriminatory to members of the CAF that do not fit within the white, male majority. As a result, the military environment is designed around the male service member married to a civilian spouse, which has created systemic legacy barriers for women and others who fall outside the norm (including but not limited to LGBTQ2+, racialized, Indigenous, and persons with disabilities). The recommendations to improve workplace support provide ways to mitigate the exceptional nature of the military workplace that result in discriminatory behaviours and practices, in order to operationalize the CAF's People First philosophy (People First, Mission Always). They are based on the premise that in order to improve gender and diversity representation in the military, we need to first create the conditions for a safe, equitable, inclusive, accountable, and enabling workplace. These recommendations are grouped within three lines of effort:

- Acknowledge, identify, and address systemic biases and barriers;
- Redesign the military workplace for greater inclusiveness and equity and;
- Improve accountability for transformative change.

Recommendation Two: Re-imagine CAF leadership accountability and organizational culture

This series of recommendations focuses on CAF leadership, promotion processes, and organizational culture. The proposal is based on the understanding that CAF members are socialized and indoctrinated into a military way of life through formal training and informal learning. This report focuses on informal learning (socialization) to demonstrate how members learn to conform to organizational norms that can be exclusionary. Newcomers (i.e. recruits and junior personnel) learn how to think and behave by observing and interacting with mid-and-senior leadership as they participate in the military organization, ultimately emulating and reproducing what can potentially be harmful views and perspectives regarding inclusion and gender norms.

As a result, the proposal provides recommendations that focus on equitable opportunity, access, and support throughout the CAF's career progression and leadership systems. This requires cultural change with respect to military leadership values, practices, and policies, which question the privileging of the CAF's ideal warrior narrative and the unearned privilege that some members gain over others. Tangible examples include, but are not limited to: a GBA+ of the entire career progression system (including intake and recruitment); rethinking and broadening leadership values and skills through a GBA+ lens; supporting a critical mass of women and diverse people in leadership positions; creating and valuing adaptive career paths; ensuring all CAF leadership engages with 'critical acts' and ensure associated resources; research and attention on resistance of middle-management and commanding officers; and reframing actions through a lens of equity.

Recommendation Three: Implement a career-long Inclusion, Diversity, Equity, and Accountability (IDEA) Education Program to shape military behavior

To move forward and evolve as an organization, the CAF needs to develop and implement a new, comprehensive and career-long Inclusion, Diversity, Equity, and Accountability (*IDEA*) educational program. This program would be mandatory for all Officers and Non-Commissioned Members (NCMs) and integrated over a member's career starting from recruitment. The goal of developing the *IDEA* educational program is to implement real social change in the

CAF, and provide new and existing military members the knowledge and understanding to inform their actions and decisions.

The program should be stand-alone, career-long, and corresponding to various rank levels, age, and level of understanding. Members must successfully complete the required program level as a career requirement, with assessment mechanisms to be determined. Key constructs and knowledge proposed include, but are not limited to: critical thinking; personal bias; harassment; discrimination; racism; bystander intervention; intersectionality; misconduct; LGBTQ2+ history in the Defence Team and gender-inclusive language; culture and organizational cultures; international commitments to gender equity; hegemonic masculinities and femininities; privilege; the application of GBA+; vulnerability; professionalism; willingness to learn; self-management; team building; and flexibility.

To coincide with the career program, *IDEA* days are proposed to promote continuous learning. Every CAF unit should participate in such programming, led by qualified professionals, to allow members to refresh their knowledge, acquire updates on legislation and policies, and engage in dynamic and meaningful discussions.

Figure 1: Recommendation Roadmap[3]
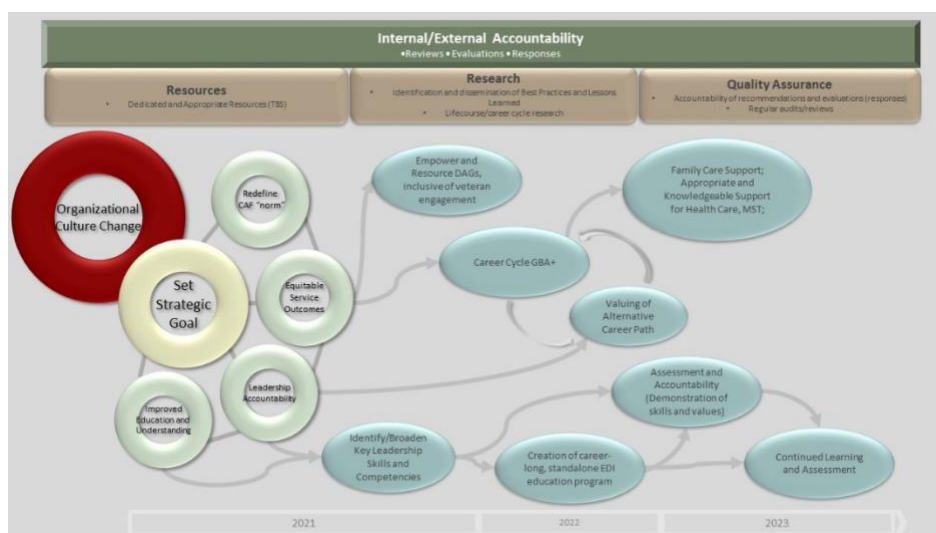
In addition to the actions proposed, the recommendation roadmaps above require internal and external accountability, dedicated and appropriate resources, ongoing research, and quality assurance. Figure 1 summarizes the key recommendations and proposed timelines.

Way forward

From August 2020 to June 2021, the Consultation Group for Gender Representation and Diversity collaboratively conducted a Needs Assessment, supported the development of roadmap recommendations, and presented progress of these consultations to stakeholders across the Defence Team. The Consultation Group agreed upon three core areas of focus in support of culture change: education, leadership accountability, and workplace support. Subject Matter Experts thus created roadmap recommendations to respond to and support culture change in the Canadian Armed Forces.

Director Litigation Oversight is now responsible for the furtherance of these recommendations to senior leadership of the Canadian Armed forces for decision and

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[3] This summary depicts recommendations at the highest level. Readers are encouraged to review the detailed recommendations.

implementation. Until such time that a coordinating responsible agent is identified by senior leadership, where possible, recommendations should be reviewed and implemented within commands. The successful consideration and implementation of these recommendations require a coordinated, collaborative, consolidated approach across the Defence Team.

PART I

Overview of Consultation Process

Introduction

On 26 November, 2019, the Government of Canada (Canadian Armed Forces and Department of National Defence) agreed to the Final Settlement Agreement (FSA) of the Heyder-Beattie Class Action. The settlement acknowledged that members of the Canadian Armed Forces "experienced sexual harassment, sexual assault, and/or discrimination on the grounds of sex, gender, gender identity or sexual orientation in connection with their military service."[4] Some public service employees were also recognized as being survivors of sexual assault, harassment, and/or discrimination.

The settlement agreement included several measures, ranging from consultations to improve survivor support, a restorative engagement program, policy updates through Veterans Affairs Canada, and compensation. Among these measures, a commitment was made for the Canadian Armed Forces to conduct Consultations for Gender Representation and Diversity (Schedule O). This Final Summary Report provides an overview of these consultations, and the resulting recommendations developed by three external Subject Matter Experts. These Subject Matter Experts were chosen collaboratively by the Representatives during Phase One (See Annex 1).

Alignment

This consultative process aligns, informs, and expands on ongoing work within the Department of National Defence and Canadian Armed Forces as it works to foster a more diverse and inclusive culture. Strategic initiatives including, but not limited to the *Defence Team Human Resource Strategy*, the *Canadian Armed Forces Diversity Strategy*, and *Employment Equity Plan* reflect the ways in which inclusivity and diversity must be mainstreamed across the Department, bases and wings. Ongoing and improved implementation of Gender Based Analysis Plus (GBA+), Indigenous Principles, and recommendations stemming from the LGBT Purge Final Settlement Agreement also bolster this work and provide important considerations during the implementation of the proposed recommendations.

Context

This section puts into context some of the existing research and initiatives as they relate to culture change and diversity in the Canadian Armed Forces, situating the Consultations for Gender Representation and Diversity within a broader, existing program of work and understanding. In addition to internal research led by Director General Military Personnel Research and Analysis (DGMPRA), several internal and external evaluations have identified service gaps and opportunities within the Canadian Armed Forces as it relates to diversity, inclusion, and accountability. The three recommendation reports also provide ample evidence and research regarding diversity in the armed forces, and the barriers that persist for equity-deserving groups.

Existing evaluations and recommendations include, but are not limited to, *The Report of the Standing Committee on National Defence (NDDN) Improving Diversity and Inclusion in the Canadian Armed Forces* (2019). The Report provided twenty-three (23) recommendations ranging from cultural awareness to alternative career paths for women and diverse peoples. The *ADM(RS) Evaluation of Diversity and Inclusion (D&I) in the Defence Team* (2019) provided a targeted assessment of governance mechanisms in the Canadian Armed Forces and National Defence, with

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[4] Sherry Heyder, Amy Graham and Nadine Schultz-Nielsen and The Attorney General of Canada, and Larry Beattie and The Attorney General of Canada, *Final Settlement Agreement* (2019): 1.

recommendations broadly focusing on the need for a common vision related to diversity and inclusion and performance measurement.

Additional reports, such as the *External Review into Sexual Misconduct and Sexual Harassment in the Canadian Armed Forces* (2015) (the "Deschamps Report"), the *Auditor General of Canada Report 5—Inappropriate Sexual Behaviour—Canadian Armed Forces* (2018), the *Standing Committee on the Status of Women Treatment of Women in the Department of National Defence* (2019), and The Standing Senate Committee on National Security and Defence Report *Sexual Harassment and Violence in the Canadian Armed Forces* (2019) collectively call for increased attention and proposed initiatives to combat sexual violence and hyper-masculine culture in the Canadian Armed Forces. Together, these reports (and those that came before them, including the Royal Commission on the Status of Women) highlight the implications of discriminatory military culture. While the Heyder-Beattie Final Settlement Agreement identifies the need for improved initiatives to support gender representation and diversity, this requirement has been reflected and called for by civil society and academia for some time.

Research conducted by the Department of National Defence corroborates some of these findings, and the experiences of Class members shared within the Final Settlement Agreement. To this end there are clear opportunities to improve the culture, programs, and policies within the Canadian Armed Forces as they relate to inclusion and diversity. Particularly with regard to gender discrimination, "significant differences were found between men and women in reported discrimination: Women reported experiencing significantly more discrimination than men in the 12 months (Cotter, 2016; Daugherty & Peach, 2018; LeBlanc & Wang, 2017) and 24 months (Wang, 2013a) prior to the study."[5] In addition, research on women in non-traditional occupations has found that women's low recruitment and representation rates can be explained in part by organizational culture and leadership.[6] This discriminatory culture is further exemplified with interviews of Canadian Armed Forces women in a 2017 research study, which found:

> "Many participants felt that the military culture is male-dominated. One participant stated: "The old boys club is very much alive still."[7]

> "Many participants felt that they need to work twice as hard as men to prove that they could be successful in a particular trade or job…For example, one participant contended: "You have to be twice as good as the guy sitting next to you to even be recognized that you're a human being."[8]

Career trajectory and senior leadership in the CAF was also recognized as an opportunity for further discussion by the Consultation Group. While there is evidence that exposure to diversity of thought and experience can improve career trajectory for senior leaders in the CAF,[9] there are also "underlying factors that can play a significant part in determining capability to

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[5] Manon LeBlanc and Justin Wright, *Harassment and discrimination research in the Canadian Armed Forces and Department of National Defence.* Defence Research and Development Canada Scientific Letter DRDC-RDDC-2018-L149 (June 2018): 10.
[6] Human *Systems*® Incorporated, *Impacts of Culture and Leadership on Gender Integration and Operational Effectiveness in Male-Dominated Environments,* Scientific Letter DRDC-RDDC-2015-C087 (06 May 2015).
[7] Barbara Waruszynski, Kate MacEachern, Capt Eric Ouellet, *Women in the Profession of Arms: Female Regular Force members' perceptions on the attraction, recruitment, employment, and retention of women in the Canadian Armed Forces,* Scientific Letter DRDC-RDDC-2017-L228 (July 2018): 16.
[8] Barbara Waruszynski, Kate MacEachern, Capt Eric Ouellet, *Women in the Profession of Arms: Female Regular Force members' perceptions on the attraction, recruitment, employment, and retention of women in the Canadian Armed Forces,* Scientific Letter DRDC-RDDC-2017-L228 (July 2018): 16.
[9] Julie Coulthard, *A Qualitative Study on the Career Progression of General Officers/Flag Officers in the Canadian Armed Forces,* DRDC, Scientific Letter (July 2018): 9.

achieve senior rank levels, including but not limited to work-family balance."[10] While work-life balance and family responsibilities are experienced by many Canadian Armed Forces members, the previously referenced NDDN report acknowledges that "Gender-based research has demonstrated that unpaid family care and household work are still primarily carried out by women,"[11] and women face particular challenges relating to career progression in the military.[12]

The importance of intersectionality during this consultation was also noted. Research on racism and harassment has found that "visible minorities and Indigenous peoples have reported a range of negative experiences and perceived challenges with career progression due to inequitable or discriminatory treatment"[13] and how there are compounding effects of gender and ethnicity when considered together. "The intersectionality of gender and ethnicity is an important factor that impacts the degree of inclusion visible minority and Indigenous members experience at their unit. Research has noted important differences across visible minority communities, and particularly between visible minority men and women."[14] Intersectionality, as reflected in the above studies, was identified as a key consideration by the Consultation Group.

The need to reflect and address military organizational culture must be underscored. Throughout the consultation process, it was identified that real change must occur at the cultural level, though tangible and realistic recommendations can support this institutional change while mitigating barriers to inclusion and participation of equity-deserving groups. The recommendations proposed by the Subject Matter Experts can broadly support culture and organizational change, but include tangible recommendations that can be implemented in a timely manner.

Summary of consultation process

The following provides an overview of the intent, scope, objectives, and outcomes of the Schedule O: Consultations for Gender Representation and Diversity, as stipulated in the Final Settlement Agreement. Following this overview, a summary of the consultation process and milestones for each Phase is provided.

Intent and scope

The Schedule O Consultation Group was one of five measures to be implemented in response to the Final Settlement Agreement. The Consultation Group was comprised of three Department of National Defence and Canadian Armed Forces representatives, three mutually-agreed upon Subject Matter Experts, and three Class Members. The Consultation Group was responsible for garnering external subject matter expertise and lived experiences of current and former Canadian Armed Forces members in order to inform the development of recommendations to improve gender representation and diversity. The consultation process included an assessment

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[10] Julie Coulthard, *A Qualitative Study on the Career Progression of General Officers/Flag Officers in the Canadian Armed Forces*, DRDC, Scientific Letter (July 2018): 9.

[11] Women, Peace and Security Network – Canada, "Gender Perspectives and the Women, Peace and Security Agenda in Canada's Defence Policy, Submission to the Defence Policy Review by the Women, Peace and Security Network – Canada, 30 July 2016," Brief submitted to Government of Canada, *Report of the Standing Committee on National Defence: Improving Diversity and Inclusion in the Canadian Armed Forces* (June 2019): 31.

[12] Government of Canada, *Report of the Standing Committee on National Defence: Improving Diversity and Inclusion in the Canadian Armed Forces* (June 2019): 31.

[13] Justin Wright and Jennifer Lee, *Harassment and Discrimination Research in the Canadian Armed Forces: A Snapshot*, Scientific Letter *DRDC-RDDC-2019-B033 _EN* (2019): 2.

[14] Justin Wright and Jennifer Lee, *Harassment and Discrimination Research in the Canadian Armed Forces: A Snapshot*, Scientific Letter *DRDC-RDDC-2019-B033 _EN* (2019): 2.

and identification of gaps that may currently exist in military policies, programs, and processes. The three Subject Matter Experts were responsible for developing their recommendation reports, based on the process outlined in the settlement (Needs Assessment, Development, and Finalization).

As identified in the *Terms of Reference* (Appendix 2),[15] the Representatives collaboratively agreed on the scope of work and focus of the consultations. Early in the consultative process, the Consultation Group members agreed that the intent and scope of the recommendations were not explicitly to assess Employment Equity goals. Rather, the group agreed on the need to identify larger cultural challenges, and tangible recommendations that could be implemented to begin addressing the systemic and "legacy barriers" to culture change. In doing so, the Consultation Group agreed that recommendations should set the necessary conditions for a more equitable, inclusive, and enabling Canadian Armed Forces, rather than focusing on increasing the numerical representation through short-term initiatives.

Objectives and outcome

The Consultation Group was implemented in three phases, as set out in the *Heyder-Beattie* Final Settlement Agreement. Broadly, these phases included:

❖ **Phase One: Needs Assessment.** Provided an overview of current initiatives and context of the Canadian Armed Forces to the Subject Matter Experts and Class Member Representatives. Based on the Phase One Needs Assessment, the Subject Matter Experts, in consultation with Defence Team and Class Member Representatives, identified strengths and weaknesses within the overall approach to gender representation and diversity;

❖ **Phase Two: Development.** Supported the Subject Matter Experts and provided feedback in the development of their recommendations to improve gender representation and diversity. Subject Matter Experts developed recommendations for the Canadian Armed Forces using industry standards, research, and best practices. The outlines and draft proposals were refined with input and feedback gathered from the Representatives, and;

❖ **Phase Three: Finalization.** This Phase included the finalization of the Subject Matter Experts' Recommendation Reports and presentation to Commander Military Personnel.

This Summary Report, comprised of the materials generated during the consultations and three Subject Matter Expert Recommendation Reports to address gender representation and diversity in the Canadian Armed Forces, was the primary outcome of Schedule O.

Summary of events

The below timeline summarizes the meetings held for each of the three Phases. An overview of the progress and milestones for each Phase is then provided.

Figure 2: Overview of Consultation Phases

Phase One Needs Assessment	Phase Two Development	Phase Three Finalization
September 2020 — December	January 2021 — May	June — July

Phase One

Three Subject Matter Experts were chosen in February 2020, based on their knowledge and expertise in a particular field, by way of a collaborative process that engaged the Defence Team and Class Representatives. Seven meetings were held during the first phase, including multiple meetings involving all group members, and on occasion, several smaller subject driven sessions. The focus of briefings spanned a wide host of topics ranging from personnel policies, Gender-Based Analysis Plus (GBA+) integration, Employment Equity and the role of Universality of Service, to the work on Adaptive Career Paths, professional conduct, Defence Advisory Groups, and finally, ongoing research. The scope of the consultations and Needs Assessment began quite broad. The facilitator assessed the range of discussions through a thematic analysis, resulting in several potential key areas of focus (See Appendix 3, Summary of Needs Assessment). The six Representatives then reviewed the overarching themes proposed.

The outcome of the Phase One Needs Assessment was a proposal from the Representatives, requesting roadmap recommendations from the Subject Matter Experts, informed by the challenges and opportunities identified during the consultation. Three core areas were identified by representatives as critical to culture change, gender representation and diversity: education, leadership accountability, and workplace support. The intent was for Subject Matter Experts to each address one theme and provide evidence-based recommendations. The first phase of Schedule O was completed as of 6 November 2020. From November 2020 to January 2021, Subject Matter Experts created outline draft roadmaps that were shared for representative consideration and feedback in Phase Two.

Figure 3: Thematic Focus of Subject Matter Experts

Phase Two

The Development Phase (Phase Two) of the Consultations for Gender Representation and Diversity commenced 1 January 2021. Subject Matter Experts drafted outline roadmap recommendations focusing on their respective themes. Outlines were presented to the Consultation Group for preliminary feedback and direction over the course of three meetings (one for each theme, respectively). Following commentary on the initial draft outlines, the Subject Matter Experts revised their outlines and drafted full reports. Over the course of three additional meetings, Subject Matter Experts presented their full draft reports for commentary from the Consultation Group.

Commentary on the reports was positive overall. Representative feedback focused on inclusive language, providing greater clarity, and contextualizing some of the recommendations being proposed. Key areas that required further deliberation focused on language: for example, the implications of denoting "soft skills" as such,[16] and the tangibility of some recommendations. The Development Phase concluded on 7 May 2021, at which point all Subject Matter Experts had presented their full draft roadmaps for final review and commentary.

During the Development Phase, Defence Team Representatives began disseminating the broad themes and recommendations resulting from the Needs Assessment. The briefing process was multi-staged, with audiences including senior governance (Heyder-Beattie Steering Committee), CMP leadership as the Canadian Armed Forces responsible agent for Schedule O, and pan-departmental subcommittees (i.e. Defence Team Representative and Inclusive Subcommittee).[17]

Phase Three

The Finalization Phase consisted of three meetings. The first included Subject Matter Experts' final presentations to the Consultation Group. Collectively, the Consultation Group also provided comment on this Final Summary Report for submission. To conclude this Phase, the Consultation Group presented the recommendations and Final Summary Report to Commander Military Personnel (CMP) as the responsible agent for Schedule O, in addition to key stakeholders that may be involved in the response to, and subsequently, implementation of, the proposed recommendations.

Phase Four

While not committed to in the Final Settlement Agreement, the Consultation Group proposes that a Phase Four be initiated and developed by Executive Director, Director Litigation Oversight that provides a Canadian Armed Forces response and implementation plan for these recommendations. The work of Schedule O should not conclude with the presentation of recommendations; rather, an assessment, including costing of the recommendations, is proposed.

Operating climate

COVID-19

The Consultations for Gender Representation and Diversity were originally intended to be held in-person. Due to COVID-19, the consultations were held on a virtual platform (Zoom). While in-person discussions may have supported improved personal connection and more fluid dialogue, the Consultation Group adapted to the online platform. Overall, the quality of the consultations were not inhibited from the online discussion format. In addition, this format enabled the Consultation Group to meet more frequently (though for shorter windows of time), supporting a

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[16] Subject Matter Experts have varying perspectives regarding the term "soft skills." All members agreed that the skills encompassed by the term (interpersonal skills, communication, social and emotional intelligence, etc) are of utmost importance. However, some suggest that the term "soft skills" underestimates the importance of what should be considered essential performance traits.

[17] The Defence Team Representative and Inclusive Subcommittee (RIC) is comprised of Director-General and Director level membership representing diversity and inclusion stakeholders from across the Defence Team (military and civilian). Membership includes, but is not limited to, Director General Indigenous Affairs, the Sexual Misconduct Response Centre, Director Gender Equality and Intersectional Analysis, and Director General Workforce Development.

continuation of discussion and regular communication that may not have been as frequent with in-person meetings.

Defence Team culture

In February 2021, allegations surrounding multiple senior Canadian Armed Forces members began circulating in the media. The stories that were shared by survivors and accounts of abuse of power and misconduct resonated with many Consultation Group members. The Consultation Group acknowledged and addressed the challenges these accounts had on members and on the work of the Group writ large. The development of recommendations continued, motivated by the opportunity to present solutions that can begin to address the challenges identified during recent testimonies to Parliament and investigations led by both the Standing Committees on National Defence, and the Status of Women.

PART II

Recommendation Reports

Context of Recommendation Reports

As noted previously, the Phase One Needs Assessment resulted in a broad range of potential focus areas for the Subject Matter Expert recommendations (see Appendix 3). Through a series of scoping meetings, the Class and Defence Team Representatives requested the Subject Matter Experts focus on three themes: improved education, leadership accountability, and workplace support.

The narrowing of the Needs Assessment resulted in some subjects falling beyond the scope of the Subject Matter Expert reports.[18] These topics were raised and are pertinent to supporting survivors and addressing misconduct in the Canadian Armed Forces, and therefore would benefit from further discussion and deliberation. As the Canadian Armed Forces determine an implementation for the Subject Matter Expert recommendations, the following should also be considered:

Commemoration

- ❖ A commemorative pin for survivors of misconduct
- ❖ A commemorative event to acknowledge and educate Canadian Armed Forces and Defence Team members regarding Military Sexual Trauma

During discussion of military tradition, the importance of ceremony and dress were raised. It was suggested that the beginning of culture change could occur with adaptation of traditions, to include a patch, pin, and/or ceremony for survivors. Members noted how something tangible for veterans would be very meaningful for the community.

Improved survivor support

- ❖ Dedicated points of contact on bases and wings for survivor support and advocacy
- ❖ Review of the Duty to Report
- ❖ Improved mental health support and leadership understanding
- ❖ Improved alignment between career management and medical services

The ways in which the Defence Team and Canadian Armed Forces support survivors of misconduct or discrimination were recognized as areas for improvement. Members noted the disparities between career management and medical support, a lack of control and agency for survivors with regard to the reporting process, and the opportunity for improved support services through dedicated, knowledgeable, trauma-informed and trained base and wing points of contact.

Improved accountability

- ❖ Review of the Military Justice System as it relates to abuse of power and misconduct[19]
- ❖ Reimagining and refreshing the oath, values, and ethics for new recruits

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[18] The Subject Matter Experts did an excellent job including as many challenges and recommendations as possible. Due to time constraints of the Final Settlement Agreement and overall scope and intent of the Schedule O, not all avenues identified for consideration were addressed by the consultation group work.

[19] Prior to the completion of this consultation process, the *Third Independent Review of the National Defence Act* was released, written by the Honourable Morris J. Fish.

Leadership accountability is crucial to ensure trust and well-being of Canadian Armed Forces members. As the Defence Team reflects on its organizational culture and challenges, examining the extent to which members are assessed on how they live and promote the values and ethics agreed to when recruited is required. Improved reflection on what is asked of members and confirming understanding of these requirements during recruitment is also an opportunity for improvement.

Subject Matter Expert biographies

The following recommendation reports were created by three contracted Subject Matter Experts. While informed by the consultation process, the views expressed in the Subject Matter Expert Recommendation Reports are those of the authors alone. The Subject Matter Expert Recommendation Reports are reproduced herein in their original form and as submitted by the authors, with the exception of formatting. Following a brief overview of the author biographies, the reports can be read in full.

Dr. Maya Eichler, Mount Saint Vincent University

Author of: Redesigning the CAF Workplace to Enable Culture Change

Maya Eichler is an Associate Professor in Political and Canadian Studies and Women's Studies at Mount Saint Vincent University (MSVU). She holds the Canada Research Chair in Social Innovation and Community Engagement and directs the Centre for Social Innovation and Community Engagement in Military Affairs at MSVU. Dr. Eichler is interested in social change and citizen engagement in the military and security sphere, with a particular emphasis on the role of gender. Dr. Eichler conducts research on Canadian defence policy; gender, sexual violence, and the armed forces; the transition from military to civilian life; and community stories of war and peace. Dr. Eichler has published the book Militarizing Men: Gender, Conscription, and War in Post-Soviet Russia with Stanford University Press (2012) and the edited volume Gender and Private Security in Global Politics with Oxford University Press (2015). Her articles have appeared in the International Feminist Journal of Politics, Critical Military Studies, Armed Forces & Society, Études International, Critical Security Studies, Citizenship Studies, Brown Journal of World Affairs, International Journal, Military Behavioral Health, Journal of Military, Veteran and Family Health, the Journal of Family Theory and Review, and Canadian Public Administration/Administration publique Most recently she edited a special issue of Atlantis: Critical Studies in Gender, Culture & Social Justice titled "Gender and the Canadian Armed Forces: Does Change Mean Feminist Progress?" She is also the GBA+ Convenor for the DND-MINDS funded "Defence and Security Foresight Group."

Dr. Nancy Taber, N²M Consulting

Author of: Eliminating unearned privilege: Problematizing the warrior ideal embedded in recruitment, retention, and promotion policies and practices

Dr. Nancy Taber is a Professor and the Adult Education Program Director in the Department of Educational Studies at Brock University. She is a retired military officer who served as a Sea King helicopter air navigator Tactical Coordinator (TACCO). She holds a Bachelor of Arts in Politics from Royal Military College, a Master of Education (focus on Adult Education) from Mount Saint Vincent University, and a PhD in Education (focus on Adult Education) from the

University of South Australia. She is a member and past President of the Canadian Association for the Study of Adult Education, a professional member of the Canadian Authors Association, and the former Editor-in-Chief of the Canadian Journal for the Study of Adult Education. Her research explores the ways in which learning, gender, and militarism intersect in daily life, popular culture, museums, educational institutions, and military organizations. She teaches in the areas of critical adult education and sociocultural learning, with a focus on gender and militarism. Dr. Taber is the editor/co-editor of 5 books and two special journal issues; the author/co-author of 23 book chapters, 46 journal articles, and 57 national and international conference presentations; and, the author of short stories and a novel from her fiction-based research exploring the complex experiences of women in relation to war and the military. Her consultation work focuses on intersectional feminism and militarism, as well as human performance in harsh environments, for law firms, government organizations, military organizations, and private companies.

Dr. Grazia Scoppio, GS Global Consulting

Author of: If you build it, they will come: (Re)building an inclusive, diverse, equitable and accountable Canadian military through education

Dr. Grazia (Grace) Scoppio is a Professor in the Department of Defence Studies at the Royal Military College of Canada (RMC), is cross-appointed in the Queen's University Department of Political Studies, and is a fellow at the Centre for International and Defence Policy at Queen's. She was selected as a Fulbright Canada Research Chair in Peace and War Studies at Norwich University, in Vermont, USA, for 2021. During her residency at Norwich, her research focused on immigrants' participation in the military from an international perspective. Dr. Scoppio was the Dean of Continuing Studies at RMC from 2017 to 2020 after having served as Associate Dean from 2013 to 2016. Between 2002 and 2013, she held appointments at the Canadian Defence Academy and the Canadian Forces Leadership Institute (CFLI). Dr. Scoppio holds a Bachelor of Arts (Honours) from the University of Toronto, a Master's degree from the Université Stendhal Grenoble 3, France, and a Ph.D. in Education from the University of Toronto. Her multidisciplinary research includes diversity in military organizations; migration; military education; comparative and international education; and organizational learning. She presented at many national and international conferences and her research appears in numerous authored or co-authored publications, including: books, scientific reports, chapters in edited volumes and articles in peer reviewed journals such as *Armed Forces & Society*. She has received several grants and awards including from the Social Sciences and Humanities Research Council of Canada, the Canadian Department of National Defence, and Fulbright Canada. Dr. Scoppio is an active member of various academic societies including the Inter-University Seminar on Armed Forces and Society, and the Comparative and International Education Society of Canada, where she has served on the Executive in different capacities since 2000.

Subject Matter Expert recommendation reports

Redesigning the CAF Workplace to Enable Culture Change

Dr. Maya Eichler, Mount Saint Vincent University [20]

Premise: The Military as an Exceptional Gendered Workplace

When considering military culture issues – from sex/gender and diversity representation to sexual misconduct in the Canadian Armed Forces (CAF) – it is crucial to understand the exceptional nature of the military workplace. Operational readiness is its raison d'être; 24/7/365 work, universality of service, unlimited liability, and mission before self are key features of military life. Often described as a "total institution" (Goffman, 2006), the military has control over many aspects of service members' lives, such as their health care, their family relations, and non-work activities. The military is also a workplace with a unique relationship between employer and employees. There is no union to defend military employees' rights or support their work-related concerns, and none of the independent oversight bodies found in other workplaces (i.e., provincial Canadian Workers' Compensation Boards system, Federal Minister of Labour investigation system).

The exceptional nature of military work has been used in the past to justify the military's status as a quintessentially male and masculinized workplace. Until 30 years ago, all combat-related roles and positions were assumed to be male only. The entire military infrastructure and system have been built around the norm of the (Anglophone) white, heterosexual, cisgender male service member. As a result of this history, the military institution and its culture privilege male service members and associated traits of warrior masculinity. This has created systemic biases and legacy barriers for women and others who fall outside the presumed "ideal" or "norm". They are tolerated and accommodated, but not systemically included in a meaningful way. It has been up to women and other historically underrepresented service members to expend the time and energy required to figure out how to fit into a system not built with them in mind, not unlike left-handed people who have to function in a world organized for right-handed people.

This report challenges the assumption that the lack of sex/gender and diversity representation as well as the problem of sexual misconduct can be meaningfully addressed without changing the system. Military (and veteran) systems have historically been blind to, and characterized by, systemic biases and research gaps toward all historically underrepresented military members and veterans.

Adding more women, LGBTQ2+, Black, Indigenous, or People of Colour "and stirring" will not be sufficient for military culture change. Previous attempts at addressing sex/gender and diversity representation as well as military sexual misconduct have focused on superficial and simplistic solutions, such as lifting legal barriers, increasing the number of female recruits, or ordering members to stop engaging in sexual misconduct. Never have there been attempts to develop a comprehensive strategy of culture change based on undoing systemic biases and legacy barriers.

What is required is a fundamental shift in thinking from "how can we get more women and diverse Canadians to join the CAF?" to "how can we create an inclusive, welcoming, safe, respectful, and enabling workplace that is not only free from harm and discrimination but in which women and diverse members can thrive?" The former puts the onus on women (see e.g., Earnscliffe Strategy Group, 2017). The latter foregrounds the role and responsibility of the institution in bringing about culture change.

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[20] This report and its related recommendations draw from the author's subject matter expertise, earlier research and publications, the broader relevant literature, and feedback from the Heyder-Beattie Class Action Schedule "O" Consultation Group.

This report suggests a **three-fold roadmap for change.** First, we need to fully address and remove the systemic biases and legacy barriers that continue to exist and harm historically underrepresented military members. Second, we need to engage in an inclusive redesign of the military workplace. Third, in that redesign we need to include the perspectives of those most negatively affected by today's military workplace. The redesign requires identification and removal of sex/gender biases and barriers as well as the development of tailored and appropriate supports, services, and programs for historically underrepresented military subpopulations.

The lack of sex/gender and diversity representation and the problem of military sexual misconduct are systemic issues and therefore require systemic solutions that enable transformative change. Transformative culture change requires redesigning the military workplace by getting to the root causes of sex- and gender-based discrimination and violence, as well as the ways in which they are reinforced by racism, homophobia, and other forms of discrimination and violence towards those who do not fit the current "ideal" of the white, heterosexual, cisgender male service member. It will also require redefining military culture around a new and inclusive understanding of the identity of the Canadian soldier, sailor, aviator, and special forces operator.

Understanding the problem

The historical design of the military institution: this is not a new problem

It is crucial to, first of all, understand the military's long history of perpetuating gender and other inequalities. What we are dealing with is not a new nor just a contemporary problem, but one with deep historical roots. While gender may be the military's most defining feature, it is important to note that gender works in conjunction with other structures of discrimination. The CAF has long been not only a male-dominated and masculinist institution but also a heteronormative, ableist, and white settler institution (George, 2016; Poulin & Gouliquer, 2012).

The CAF, like other military institutions, was built and designed for service men – specifically, for heterosexual, white, cisgender men. The institution has a long history of assuming the male norm and privileging masculinity, and of discriminating against service women. For most of the history of the CAF, women were not permitted to serve in the same way men were allowed to. They were only selectively included, and constructed as the "other" within military culture. The privileging of masculinity and the celebration of the masculine warrior are key elements of the culture and especially hard to remove because they have been historically intertwined with the very raison d'être of the military: operational effectiveness. That legacy runs deep and still permeates the culture today (Davis, 2020; Eichler, 2019a; Taber, 2018; Winslow & Dunn, 2002).

As a result of this historical legacy, the entire military environment has been designed around the norm of the (white, heterosexual, cisgender) male service member married to a civilian spouse, which has created systemic legacy barriers for women and others who fall outside the "norm" (LGBTQ2+, Black, Indigenous, People of Colour, disabled members and others, e.g., members who are single or single parents). Bathrooms, accommodations, equipment design, uniform design, vehicle size and design, airplane cockpits, and medical care norms were based on the average male height, weight, strength, shape, and physiology. The same is true for military personnel policies designed to support men's lives and needs, career paths, and leadership styles. The military reflects, in a heightened way, the masculine bias found in society more broadly (Criado Perez, 2019).

In addition to discrimination against women, heteronormativity and homophobia are built into the historical design of the CAF. From the late 1950s and into the early 1990s, the military engaged in a concerted campaign to "purge" lesbian and gay service members from the military

and other federal public service workplaces (Fodey, 2018; Kinsman & Gentile, 2010; Poulin & Gouliquer, 2012).

Racial and ethnic minorities also have a history of having to fight for the right to participate in the Canadian military, including Black Canadians (Ruck, 1987), Japanese and Chinese Canadians (Roy, 1987), and Indigenous Canadians (House of Commons Canada, 2019), especially in the context of the two world wars. They also had to fight for recognition after their service, which reflects the systemic whiteness of the military and broader societal racism.

The CAF also has a history of privileging Anglophone men. And even as official bilingualism has been practiced for over 50 years now, there remains an inherent duality of Anglophone and Francophone cultures within today's military (Chouinard, 2020).

This history has led to the implicit privileging of particular men and masculinities and the "othering" of those men who do not fit the white, heterosexual, Anglo, cisgender male warrior "ideal" and the "othering" of all women and behaviours, traits, and leadership styles associated with femininity. The first step towards culture change is to recognize the continuing impact of the historical design of the Canadian military, and the way it still pervades many aspects of the institution and its culture today. When we really take that to heart, we can understand why short-term superficial changes are not sufficient to bringing about transformative change. It will take a concerted effort on the part of the institution to systemically and comprehensively undo the legacy of this history of inequality and "othering".

**From discrimination to sex/gender and other intersectional blindness**

The military's institutional leadership fought hard, just over 30 years ago, to keep discrimination on the basis of sex intact and keep women out of combat roles. It argued vehemently before the Canadian Human Rights Tribunal to be allowed to maintain its quota for men, the "minimum male requirement" which was in effect for 84 occupations, including 29 men-only occupations, at the time. The military leadership argued that women's presence in the combat arms would undermine unit cohesion, morale, and ultimately, operational effectiveness (Canadian Human Rights Tribunal, 1989).

In 1989, the CAF was ordered to remove the minimum male requirement across all occupations. But removing legal discrimination is only a precondition for culture change, it cannot and in fact did not change the culture of the military (Winslow & Dunn, 2002). Instead, the institution adopted what Karen Davis (2013) has called a "gender-neutral approach". The problem with gender-neutrality, or gender-blindness, is that it fails to recognize the sex and gender biased structures of the military, and of military programs and services (and for that matter, of society more broadly). The motto became "a soldier is a soldier is a soldier." It assumes that treating everyone the same is good enough when, in fact, treating everyone the same reproduces existing inequities as women are set up to be treated the same as the men. But when women's sex- and gender-specific differences and needs are not accounted for, it reinforces masculine biases (Criado Perez, 2019).

Openly racist policies were long gone by the 1990s, but the Somalia Inquiry revealed the continuing relevance of racism as a problematic aspect of the military culture (Whitworth, 2004; Razack, 2004). Racism was tackled as part of Standard for Harassment and Racism Prevention (SHARP), a behaviour change based training initiative, but without tackling the historical and systemic nature of racism and assumed whiteness in the military institution. In 1992, the CAF began permitting lesbian, gay, and transgender personnel to serve openly in the face of a pending court decision, but never explicitly acknowledged the role of homophobia and heteronormativity in military culture.

For the past three decades, since external pressures for change have been growing, the CAF has focused on individual behaviour and numerical targets in line with the Employment Equity (EE) requirements (Government of Canada, 1995). EE goals have been directed at particular groups, namely women, Indigenous people, persons with disabilities, and members of visible minorities. But EE goals left invisible the systemic role of sexism, misogyny, racism, and homophobia in military culture. Only recently has the CAF began to acknowledge the need to address intersecting forms of discrimination, such as with the establishment in December 2020 of the Minister's Advisory Panel on Systemic Racism, Discrimination with a focus on anti-Indigenous and anti-Black racism, and LGBTQ2 Prejudice, Gender Bias and White Supremacy (Government of Canada, 2021c).

Figure 1. Understanding the problem
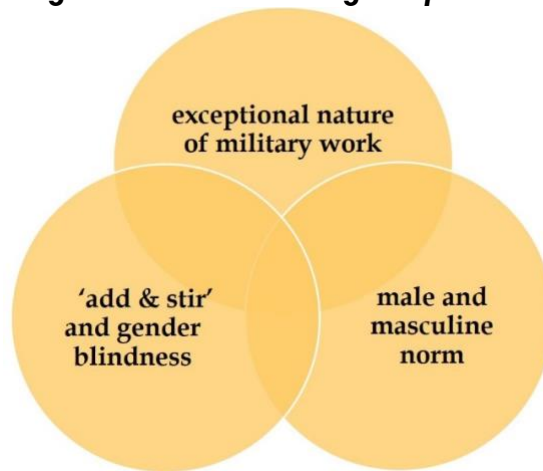
Military culture as part of the problem and flawed attempts at tackling culture change

Sex/gender and diversity representation, as well as the problem of military sexual misconduct, are intrinsically linked to the issue of military culture. Today, the military's culture is recognized as a core concern, and culture change has been identified as a top priority. As the Deschamps Report (2015) as well as Canadian and international research show, the problem is not simply that militaries are male-dominated organizations. Instead, it is the kind of masculinity promoted by most militaries, including the Canadian one, that is problematic (Eichler, 2014; Taber, 2018). This form of warrior masculinity privileges toughness, aggression, and violence and is defined in opposition to what society stereotypically associates with femininity: weakness, vulnerability, and emotion. Especially in male-dominated trades, this "tough" version of soldiering limits tolerance towards military members who do not "fit": women, LGBTQ2+, racialized people, disabled people as well as those with PTSD and other injuries (Whitworth, 2004). Arguably, the military's culture also hurts male-identified military members. It limits opportunities to talk about emotions and pain, and may discourage help-seeking. Military culture is central to understanding gender, diversity, and the well-being of military members because it shapes their identity during and after service and the treatment they receive by peers, health care providers, and the Chain of Command. When soldiers leave the military and return to civilian life, they have to find ways to leave this culture behind and adapt to civilian life (Whelan & Eichler, 2019; Eichler 2019b).

The DND/CAF leadership has recognized and identified culture change as a top priority. Yet, there are three main problems with the way culture change has been approached so far that will continue to bog down its successful implementation. First, the lack of definitional clarity about what constitutes military culture (including its gendered historical foundations) means that measures are taken without a clear conceptual understanding of the status quo or the desired outcome.

Second, the preoccupation with numbers and targets is a losing game – both because targets usually fail and because numerical targets do not ensure qualitative change to an organization's culture. Measures aimed at culture change are assumed to be evidence for culture change without proper evidence-based assessment of their effectiveness. Third, there is a preoccupation with individual behaviours and symptoms rather than root causes and systemic issues. Operation Honour was based on changing behaviours, but not on changing the conditions of service for women and other historically underrepresented groups. There has never been a comprehensive strategic attempt to undo the institutional and cultural root causes of discrimination and violence (Eichler, 2017, 2019b; English, 2018).

The Path to Dignity and Respect continues with this flawed understanding of how institutions change. It lacks an understanding of why sexual misconduct takes place or what its root causes are. Too much emphasis is once again put on individual behaviour even as the document aims to address culture change. It does not identify masculinity as a problem or even a feature of military culture. The document also does not include a consideration of how sexism, misogyny, and racism intersect to reinforce violence and marginalization. While the document talks about culture change, it focusses on aligning or realigning CAF culture rather than comprehensively changing it (Government of Canada, 2020).

Figure 2. From biased and flawed approaches to transformative change
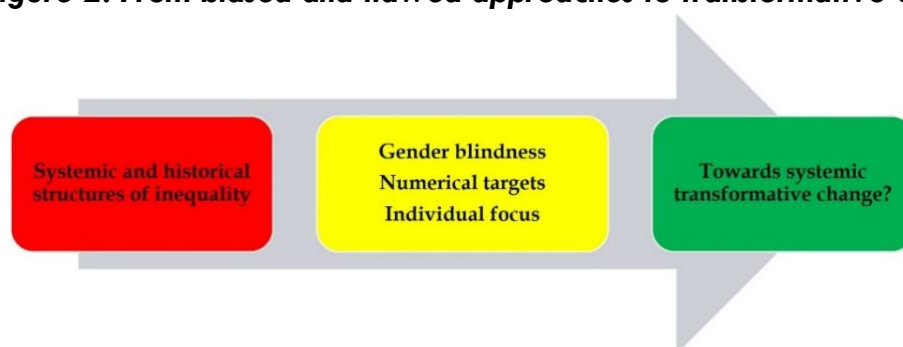
Towards transformative change

Previous attempts to assimilate or accommodate women and diverse members have not been sufficient to achieve culture change (Davis, 2020; Okros, 2020). Nor has the focus on numerical targets or on controlling individual behaviour been a fruitful approach to achieve culture change (English, 2018). There needs to be more emphasis put on the responsibility of the institution to bring about change (or on external oversight mechanisms to support such an institutional approach if the institution cannot do it on its own), and less on individuals (i.e., women and diverse members) to help bring about change. The onus has been on women and diverse members finding ways to fit into a system not built with them in mind. Instead, what is needed is systemic transformative change of the military institution. As Women and Gender Equality Canada (WAGE) explains, "Systemic change addresses or removes the root barriers preventing gender equality, rather than seeking to change women to adapt to discriminatory systems" (Government of Canada, 2021a).

As this report argues, one way to move towards transformative change is to focus on improving the quality of the workplace by removing systemic biases and barriers and making the workplace more inclusive, welcoming, safe, respectful, and enabling for all service members. Military culture is rooted not only in ideas but in the material conditions of the workplace that have been shaped by historical biases and legacy barriers. If we change those

material conditions, we are more likely to see transformative change. Mindsets change when the system and its foundational "building blocks" change.

A roadmap for change

Acknowledge, identify, and address systemic biases and barriers

The CAF should recognize and acknowledge existing systemic biases and systemic legacy barriers. A recognition and acknowledgement of systemic biases and systemic legacy barriers would move us away from the current flawed focus on individuals-based and numbers-based solutions and the expectation of women and diverse members to adapt to a biased system.

There are lessons to be learnt from the Indigenous community and the issue of reconciliation. Indigenous scholars have argued that true reconciliation can only come about when the full truth is brought to light, the institution takes full responsibility, harm is no longer done, and making amends goes beyond compensation to include transformative change (Palmater, 2019). Unfortunately, the Heyder-Beattie FSA already precludes "an admission of liability on the part of Canada" (Heyder-Beattie v. The Attorney General, 2019). But it must be underscored just how important some form of stock-taking is as a first step towards true and meaningful change and the rebuilding of trust, particularly considering the institutional betrayal experienced among military sexual trauma (MST) survivors (Eichler et al., 2019; Holliday & Monteith, 2019).

Military service outcomes are not equitable as we know from the extensive international and limited Canadian literature on military service and post-service life (Eichler & Smith-Evans, 2018; Eichler et al., 2020b). The military workplace is dangerous for all due to the exceptional nature of the work, but it carries additional risks for minority service members. **It is not that we have a "neutral system" that is not working well. What we have is a skewed system that has been designed with a certain "norm" in mind.** Military work includes many unique environments, tasks, duties, and exposures with little research or understanding about their short- and long-term impacts for women's health (Ritchie & Naclerio, 2015) as well as for the health and well-being of diverse members. But military culture itself, including a workplace historically designed around a specific white, heterosexual, cisgender male "norm", is an additional major risk factor for the health and well-being of many military members.

It is well established in the US military and veteran health literature that service women and released/retired women veterans face heightened risks for injuries and illnesses as a result of gendered occupational contexts. For military women, this includes a host of issues related to health and well-being: from musculoskeletal issues as a result of ill-fitting equipment not designed for female bodies (Friedl, 2005) to reproductive health issues related to pre-pregnancy, pregnancy, breastfeeding, and menopause (Braun et al., 2016), and much more (Eichler et al., 2020b). The potential physical and mental health sequelae experienced by both men and women who are MST survivors are well documented in the literature, while noting that women veterans are at higher risk of experiencing MST than men veterans (Pulverman et al., 2019; Wilson, 2018). US LGBTQ+ service members and veterans are at increased risk of experiencing MST (Lucas et al., 2018). They have poorer mental health outcomes, such as higher rates of PTSD and suicidal ideation resulting from minority stress (Mark et al., 2019). LGBTQ+ service members and veterans also face insensitivity and even discrimination and harassment from service providers (Ruben et al., 2019). US racialized and Indigenous veterans are found to experience higher rates of trauma and PTSD following service (which is exacerbated for racialized and Indigenous women veterans) and are less likely to receive diagnoses and medical support for mental and physical health issues than their white counterparts (Goossen et al., 2019; Muralidharan et al., 2016). As the research shows, subpopulations of service members and veterans face unique health challenges that can impact their health and well-being outcomes.

We need to shift our focus from the problem of sex/gender and diversity representation to the problem of built-in sex, gender, and intersectional biases that cause discrimination, marginalization, and potential harm to women and others who do not fit the "norm" of the white, heterosexual, cisgender male service member. Military service has long-term ongoing, often chronic health impacts on members/veterans that are experienced in sex and gender-specific ways and across intersectional lines.

To understand some of the causes of health and well-being issues we need to identify the systemic legacy barriers that lead to inequitable service outcomes. I suggest that the military ask itself the following questions: **What systemic legacy barriers are preventing women and diverse members from achieving equitable service opportunities and outcomes? How are women and diverse members currently being harmed during service?** This requires dedicated resources and research that seeks to identify in a comprehensive way what the systemic biases and legacy barriers are, e.g., in what ways the current military medical system, the current promotions system, or current universality of service requirements do not serve the needs of women and diverse members. This research needs to be directly informed by consultation with relevant impacted groups, such as women, MST survivors, and other historically underrepresented groups. Gender-based Analysis plus (GBA+) and Sex and Gender Based Analysis (SGBA) are key tools to achieve this accounting/stock-taking and create a fuller picture of barriers and harms.

SGBA is an analytical process that applies a sex and gender lens, primarily, to health research (Government of Canada, 2018). GBA+ is defined by the Government of Canada as "an analytical process used to assess how diverse groups of women, men, and non-binary people may experience policies, programs and initiatives" (Government of Canada, 2021b). Sex is understood as a biological classification that designates people as male, female, or intersex based on anatomical, hormonal, chromosomal, and genetic distinctions. Gender refers to masculinities and femininities as well as non-binary and diverse gender expressions as they manifest in socio-cultural norms, behaviours, and roles. Individuals may or may not identify with the gender associated with their assigned birth sex. It is best practice to apply SGBA and GBA+ in an intersectional way. Intersectionality highlights how sex and gender discrimination, oppression, and marginalization intersect with and are exacerbated by experiences of racialization, sexuality, Indigeneity, and ability, operating at both individual and systemic levels (Crenshaw, 1989; Eichler et al., 2020a). Both SGBA and GBA+ are relevant and necessary in the context of military service and the health and well-being of service members. With its health focus, SGBA is particularly relevant as the CAF is responsible for its members' health, and because military members and veterans have unique health needs. GBA+ is useful to examine the potentially unintended consequences of policies and programs on historically underrepresented populations, including women, LGBTQ2+, Black, Indigenous, and People of Colour (Eichler et al., 2020b).

Systemic legacy barriers primarily affect women as the largest minority group within the CAF. But sex- and gender-based barriers are reinforced by racism, homophobia, heteronormativity, and more, thus creating layers of disadvantage. Therefore, sex, gender, and intersectionality reviews of systemic legacy barriers are needed. Most importantly, the CAF needs to set the strategic goal of equitable service opportunities and outcomes for all regardless of sex, gender, race, sexuality, etc.

Redesign the military workplace for greater inclusiveness and equity

We need to start from the premise of upstream harm prevention rather than increasing recruitment. The literature shows that it is more effective to prevent harm early on than deal with responding to harm later (Bharmal et al., 2015). Such an approach requires not only the removal of existing systemic biases and systemic legacy barriers but a redesign of the military workplace.

The CAF should redesign the workplace through inclusive design principles (Kern, 2019) and intersectional sex and gender mainstreaming (SGBA/GBA+) to ensure no further harm is done and service outcomes become more equitable. Inclusive design and intersectional sex and gender mainstreaming approaches recognize that "one size fits all" does not in fact work and that we need to move away from gender-neutrality or gender-blindness (Eichler, 2016). The male body and men's career trajectory have long been assumed as the universal standard of the military workplace. Instead, the CAF needs to ask itself: **What does a military workplace look like that is enabling and safe for all? What changes need to be made to redesign the workplace so it is responsive to the needs of women and diverse members? What policy and other changes would have to be made to support a more diverse military workforce?** The CAF has a "built environment" that is based on the male and masculine "norm". Inclusive design does not disadvantage anyone, including the usual white, heterosexual male users. Instead, it means better, more inclusive design of the military workplace and career for everyone.

There is a material basis to this proposed redesign. For example, if the military aims to recruit more women, it will need to make sure it can provide facilities (e.g., washrooms) and uniforms that function for them and medical care that meets their unique needs. The costs of adapting and redesigning the workplace need to be accounted for in any culture change strategy (Eichler, 2019b).

This step also requires reflection on what traits and behaviours a soldier should ideally exhibit. The CAF will need to define a new and inclusive identity for the Canadian soldier, sailor, aviator, and special forces operator that explicitly moves away from the masculinist assumptions of the existing historically shaped "norm" or "ideal" (Duncanson & Woodward, 2016).

Currently, there is still an implicit "ideal" in circulation based on the white, heterosexual, cisgender male norm. But what should it be replaced with? This also links to the bigger question of what we see as the primary purpose of the military in the 21st century. Is this still a primarily boots-on-the ground combat operation focused force or one that sees itself as highly professionalized and cyber focused? This is an important conversation to be had internally within the CAF as well as with Canadians and their politically elected representatives.

Finally, not only do existing structures and support systems not necessarily respond to the needs of historically underrepresented military members and veterans, the lack of tailored services may exacerbate the challenges faced by them. The international research literature unequivocally calls for the development of specifically tailored programs and care that can meet the needs of women veterans, MST survivors, and other vulnerable subpopulations of veterans such as LGBTQ+, Black, Indigenous, and People of Colour (Brunner et al., 2019; Kehle-Forbes et al., 2017; Kramer et al., 2017; Rosen et al., 2013; Rosentel et al., 2016). The US showcases the strengths of a top-down integrated strategic approach to creating institutional and policy initiatives to support the diversity of serving and former members. In this context, the US Department of Veterans Affairs (VA) and its Veterans Health Administration (VHA) in particular have made great strides towards identifying and addressing the needs of women veterans and to a lesser extent the needs of LGBTQ+, racialized, and Indigenous veterans through a number of initiatives: research (U.S. Government, n.d.c); designated personnel (e.g., women veteran coordinators) (U.S. Government, n.d.d); MST coordinators (U.S. Government, n.d.b); LGBT coordinators (U.S. Government, 2017); sex-specific programing and service-delivery models (U.S. Government, n.d.a); and active outreach (Hudak, 2021). Another example that illustrates pro-active support of female service members is the Unit Guide to Leading Pregnant and Postpartum Soldiers developed by the US Army (Barber et al., 2021). Other relevant US initiatives that could be emulated in Canada, include robust women's mentoring programs such as WOVEN, a Women Veterans Network (WOVEN, 2019). The US case also highlights the importance of a government-driven and -supported research agenda to fill in historical gaps in research, especially in relation

to historically underrepresented military and veteran populations such as women (Eichler et al., 2020b). Such initiatives could productively be emulated by CAF/DND, and mirrored at Veterans Affairs Canada (VAC).

Improve accountability for transformative change

There is strong evidence that empowering and giving voice to those who have been historically silenced and marginalized is a key mechanism to achieve and sustain transformative change. Participatory engagement of historically marginalized and/or oppressed subpopulations and communities in finding solutions is a standard best practice across research and policy fields such as health (Snow et al., 2018), disability studies (Charlton, 2000), the public sector (Rioux, 2019), reconciliation with First Nations (Truth and Reconciliation Commission of Canada, 2015), and the Women, Peace and Security agenda (UNSCR, 2000), to name a few. **It speaks to the fact that the lived realities, truths, and needs of those impacted should be the guiding principle for the development of research, policy, programs, services, and benefits.**

We therefore need to include in the redesign of the military workplace the perspectives of those who have first-hand experience with the military's problematic workplace culture. This should include taking lessons learnt from the advocacy community, veterans, and all equity-seeking groups. Important lessons learnt from related efforts to remove bias and discrimination must also be drawn upon, such as the recommendations of the LGBT Purge report (LGBT Purge Fund, 2021). Accountability also means that the principle of "do no harm" needs to be streamlined throughout any change initiatives.

The principle of "do no harm" comes from the medical field but has also been applied widely in the humanitarian and aid field (Charnacle & Lucci, 2018). The importance of the "do no harm" principle has been most recently acknowledged in military and veteran research in the context of moral injury and its consequences (Williamson et al., 2021). Any research as well as development of supports needs to be guided by trauma-informed principles to be accountable to those impacted. Trauma awareness and respect for the dignity of the impacted individual must always be reinforced and considered at all levels of work.

Meaningful participation and consultations are essential features of accountability for transformative change. Consultations between the CAF and those impacted must be respectful, meaningful, and representative of the diversity of needs of MST survivors, serving and veteran women and men, LGBTQ2+, racialized, and Indigenous members. Voice must also be given to those recently having left the military as often it is only after release that the impact of MST and other harms is more fully understood and individuals are empowered to speak their truths. The current debate on culture change, internal and external to CAF, is still mostly dominated by voices who are speaking about and not for or with, affected CAF members and veterans. There needs to be clear mechanisms in place for those members and veterans to speak for themselves and contribute to ongoing culture change initiatives.

The US offers examples of what meaningful consultation with women and other diverse voices can look like. For example, the Defense Advisory Committee on Women in the Services (DACOWITS) is a body of civilian women and men that provides advice to the Secretary of Defence "on matters and policies relating to the recruitment, retention, employment, integration, well-being, and treatment of servicewomen in the Armed Forces" (DACOWITS, n.d.). <u>Canada could benefit from a similar permanent advisory board that includes lived experience voices on equity, diversity, and inclusion from a broad set of historically underrepresented service members/veterans and their allies.</u>

<u>Finally,</u> the task at hand is too complex an issue for the military to tackle on its own. Some form of <u>external oversight mechanism is needed to ensure that transformative military culture change</u> is achieved and sustained (Eichler & Breeck, 2021; Eichler & Gagnon, 2021). **It is crucial**

for the military to recognize that external oversight and involvement are an opportunity – not a threat.

Guiding principles

- Consistently apply "GBA+/SGBA". GBA+ and SGBA are essential tools to examine potential differences and inequities in service experiences and outcomes through a focus on sex, gender, and intersectionality.
- Practice the principles of "Equity" and "Inclusiveness". Every military member must be considered and included in research, policy, program, and care design with an acknowledgement of historical systemic biases that have benefitted specific groups over others, including in the creation of research knowledge. Equitable workplace support is not about being treated "equal" or "the same"—it is about understanding and accommodating the differences and creating enabling workplaces that work for all. It is about leveling the workplace playing field for military women and diverse members.
- Practice the principle of "Nothing about us without us". Equity-seeking groups—of which women are the largest group—need to be actively included, in a trauma-informed way, and have an organized voice in the research, policy, program, and care design of the CAF.
- Practice the principle of "Do no harm". Supports need to begin from the principle of "do no harm" which means ensuring that any measures taken do not lead to additional risks, burdens, or harms to those being addressed. It is best practice to require training to ensure trauma awareness, sex and gender awareness, GBA+ awareness, and a code of ethics for those with direct support roles for members of equity-seeking groups.
- Include veterans as knowledge holders. Many of the lessons learnt lie with the veteran community. Veterans should therefore be actively engaged in military culture change initiatives (Eichler et al., 2020b).
- Seek external input and oversight. Military culture change has been defined as a "wicked problem" that is too difficult for the military to tackle on its own. It requires complex solutions and external oversight (English, 2018). External oversight and input are key to ensuring progress and accountability (Eichler & Breeck, 2021; Eichler & Gagnon, 2021).

Figure 3. Guiding principles and key steps for roadmap for change

Recommendations

Acknowledge, identify, and address systemic biases and barriers

1. Designate money and resources to do comprehensive reviews of systemic sex, gender, and intersectional biases in policy, infrastructure, equipment, research, training, health care, etc.
2. Create a comprehensive inventory of systemic legacy barriers through research, reviews, and consultation with MST survivors, women, LGBTQ2+, Black, Indigenous, and People of Colour service members and veterans.
3. Set the strategic goal of equitable service opportunities and outcomes for all military members regardless of sex, gender, race, sexuality, and other identity factors.
4. Continue to strengthen GBA+ of the military workplace, including of the organizational culture, military workplace stress (operational and non-operational), work design features, organizational justice, workplace sexual harassment, etc.
5. Conduct SGBA review of Canadian Health Forces Services (CFHS) policy, research, care provision, and outcomes, inclusive of health care provider and patient satisfaction levels and regular independent quality assurance reviews for women's health at the preventive, general care, occupational medicine, and operational medicine levels.
6. Actively research best practices for safely employing and deploying women and retaining them in the workplace, including prevention of gender-based violence (GBV), intimate partner violence (IPV), and sex-specific work-related injuries.
7. Develop GBA+ informed "life course" research that examines military members' health trajectory before, during, and after military service, inclusive of feedback loop from VAC on preventable injury and illness. Such life course research should inform upstream prevention and intervention strategies to improve and optimize military service and military-to-civilian transition outcomes.
8. Include impacted military members and also veterans as knowledge holders in the identification of biases and barriers in the military workplace. Veterans have important lessons learnt that should not be forgotten and that can be used to prevent harm to current members.

Redesign the military workplace for greater inclusiveness and equity
9. Take concrete steps towards a redesign of the military to become a welcoming, inclusive, safe, respectful, and enabling workplace.
10. Apply the lessons learnt from above reviews and research in consultation with impacted military and veteran subpopulations.
11. Define a new and inclusive understanding of the identity of the Canadian soldier, sailor, aviator, and special forces operator that explicitly moves away from the (white, heterosexual) male/masculine assumptions of the existing "norm" or "ideal". This new inclusive identity should allow military members to bring their authentic self into the workplace.
12. Apply a GBA+ lens to recruitment, retention, release/retirement, transition, and health/well-being (quality of life) of military members (and veterans), e.g., ensure representation of women and other equity-seeking groups at recruiting centres; train recruiters in GBA+ and unconscious bias awareness; conduct GBA+ informed retention analysis and strategy; develop GBA+ informed transition strategy and supports. (This extends to the importance of applying GBA+ in VAC veteran commemoration, benefits, and services.)
13. Actively research and disseminate knowledge on risk mitigation and lessons learnt for equity-seeking military members and veterans among new recruits and serving and releasing members (upstream prevention of harm).

14. Implement recommendations of intersectionality reviews into Chief Military Personnel (CMP) activities including all research, policy and programs in general and specific to CFHS.
15. In line with CAF's "people first" approach and GBA+ mandate, implement SGBA/GBA+ considerations into the military health care system to ensure equitable research, policies, and care/treatment considerations for military members that are not part of the normative assumed white heterosexual male military membership. This has to include research on the specific health care needs of women, LGBTQ2+, Indigenous, and racialized members that are currently not being met. Conduct GBA+ of existing medical screening tools and amend them to reflect diverse members' medical care needs. (This will have concrete impacts on eligibility for VAC benefits and services.)
16. Provide appropriate tailored benefits, supports, and care that address the needs of equity-seeking members and actively ameliorate the impacts of systemic legacy barriers while redesigning the military system to consider diverse members' care needs.
17. Develop women-specific health care programs (informed by ongoing CFHS Strategic Women's Health Review) aimed at ensuring women's health, including reproductive health, postpartum rehabilitation, and more. Ensure there are female health care providers available to serve military women patients/clients.
18. Ensure equitable diagnosis, care, benefits, and programs including for the prevention of sex specific work-related injuries. (This recommendation extends to VAC to ensure equity in treatments, programs, and benefits for all service-related injuries and illnesses, whether related to combat, deployment, or MST.)
19. Ensure equitable MST victim/survivor supports. Introduce regular screening for MST and tailored treatments for MST survivors, a federally funded national MST peer support program (available in English/French, to men/women, and in Canada and on international deployments), and an MST coordinator or advocate to support survivors through the process of seeking care and/or reporting. Re-introduce uniformed clinical psychologists, so MST survivors have access to military culture competent care.
20. Develop a recognized definition of MST and clarify its relationship to Operational Stress Injury (OSI), Moral Injury, and PTSD. (This recommendation extends to VAC, and will need to be implemented in collaboration with VAC.)
21. MST research, policy, programs, services, and support should include GBA+ from their inception to ensure that the needs of all members across sex, gender, and intersectionalities are considered and met.
22. Encourage SME development for secondary duties such as women's health coordinators, MST coordinators, maternity coordinators, LGBTQ2+ health coordinators, etc. at CAF clinics, as in the US military medical system.
23. Strengthen mentoring initiatives for women and extend them to other equity-seeking military members. Learn from existing examples within and beyond the CAF, for example, the Integrated Women Mentorship Network, mentoring efforts through the Defence Women's Advisory Organization (DWAO) and the Royal Military College (RMC) women veteran community, and the US Women Veterans Network (WOVEN). Mentoring needs to be GBA+ informed and empower the mentee to choose their mentor. Also, guidelines for mentors should be developed to create standards so that conflicts of interest are addressed and mentoring advice is in line with culture change imperatives.

24.   Expand family supports, such as daycare, flexible work, or family leave policies, to ensure that members do not feel they have to leave military work in order to have a family. Introduce paid leave for miscarriage and pregnancy loss to acknowledge medical evidence of reproductive health challenges of military women. Apply GBA+ lens to family supports to ensure equitable access and outcomes for equity-seeking members.

Improve accountability for transformative change
25.   Empower equity-seeking groups by ensuring their organized voice is heard.
26.   Create internal mechanisms for greater transparency and accountability for transformative change, e.g., through a permanent Ministerial-level Strategic Advisory Group on Diversity, Inclusion, and Equity (in addition to the current Ministerial-level Advisory Panel on Systemic Racism, Discrimination with a focus on anti-Indigenous and anti-Black racism, and LGBTQ2 Prejudice, Gender Bias and White Supremacy).
27.   Include veterans in accountability mechanisms, e.g., allow veterans to participate in the Defence Advisory Groups (DAGs), allow veterans to feedback in a structured way to the CAF EE desks (in the absence of any similar structure or voice within VAC).
28.   Support external mechanisms for greater transparency and accountability for transformative change, e.g., by including external SME and stakeholder input while awaiting the recommendations of Justice Arbour with regard to external oversight mechanisms.
29.   Conduct regular internal and external reviews to assess progress towards removing systemic barriers for women and other historically underrepresented service members. The results of these reviews should be made public to increase transparency and accountability.
30.   Make all internal and external research related to the Heyder-Beattie FSA publicly available to increase transparency and accountability.

Conclusion

Successfully addressing sex/gender and diversity representation, as well as the problem of sexual misconduct, is key to the continued legitimacy of the CAF in Canadian society. Addressing the military's problematic culture is also key to the internal legitimacy of the CAF and to rebuilding and maintaining trust among its current and future members. While the exceptional nature of military work has been used in the past to justify discrimination against women and diverse members, now is the time to undo the existing systemic biases and legacy barriers. Instead of focusing on the recruitment of more women and other historically underrepresented members, the Canadian military needs a comprehensive strategy that centres on its institutional role in reproducing, and its responsibility in preventing, sexual misconduct along with all forms of discrimination and violence in the military workplace.

This report has provided a roadmap for creating an inclusive and enabling workplace for all military members that consists of three overarching steps. The first step is to acknowledge, identify, and address systemic biases and barriers that continue to cause discrimination and harm to women as well as other subpopulations who do not fit the white, heterosexual, cisgender male "norm". The second step is to redesign the military workplace for inclusiveness and equity by removing systemic biases and legacy barriers, creating new supports tailored to the needs of historically marginalized and underrepresented service members, redefining the identity of the Canadian soldier in inclusive ways, ensuring equity in benefits, services and care, and more. The concurrent third step consists of strengthening internal accountability towards women and other

equity-seeking groups by doing no harm and giving them an organized voice at the highest level, such as through a permanent Ministerial-level advisory group. Given the ongoing failures to achieve transformative change, long-term independent external oversight, collaboration with external SME, and transparent engagement with the Canadian public are also required to move toward the strategic goal of equitable service opportunities and outcomes for all members and a future, more inclusive CAF.

This SME report has laid out concrete steps for culture change through a focus on the material conditions of the military workplace. While the goal is to create a more equitable system that works for all, there will be resistance from those whose unearned privilege will have to be challenged and removed. Change is possible, even as it will elicit resistance, discomfort, and even backlash. In the end, the focus needs to be on doing what is best for ensuring the health and well-being of all present and future service members.

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Eliminating unearned privilege: Problematizing the warrior ideal embedded in recruitment, retention, and promotion policies and practices

Consultations on gender representation and diversity in the CAF: Leadership and organizational culture roadmap for change
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Introduction and premise: Problematizing the "one path" perspective

This report focuses on a roadmap to change Canadian Armed Forces (CAF) leadership, promotion processes, and organizational culture. It stems from the common perspective[21] that there is only one path to senior leadership in the CAF, as this belief embodies the ways in which gender and other forms of discrimination are embedded in CAF policies, doctrine, and practices.[22] As sexual harassment and sexual assault are more likely to occur in a setting where gender (and other forms of) discrimination occurs, this "one path" perception fosters the sexual harassment and sexual assault of those who are viewed as not fitting into an ideal warrior narrative.

When promotion to the highest ranks is conceived with such a narrow lens, it not only excludes certain groups of people, but virtually assures that whoever is at the associated senior ranks level has not experienced, and therefore would neither understand in a visceral way nor take into consideration in their leadership practices and policies, the challenges that women and diverse peoples face in the CAF. Therefore, the reasons for and processes by which a CAF member is promoted must be reconceptualized and reworked. This does not mean that everyone can or should be promoted to senior leadership, but that there must be equitable opportunity, access, and support throughout the CAF's career progression and leadership systems. This requires cultural change with respect to military leadership doctrine, values, practices, and policies, which questions the privileging of the CAF's ideal warrior narrative. This report and its related recommendations draw from the author's expertise, related literature, and the Heyder-Beattie Class Action Schedule O Consultation Group.[23]

This report begins with a list of concepts and definitions. It presents a brief overview of research to assist with understanding the problem that the recommendations aim to address. The report then details recommendations for change, starting with research and evidence from other male-dominated masculine organizations and then detailing specific recommendations for the CAF. It should be noted that much of these recommendations reiterate those made previously by researchers, analysts, journalists, and the External Review Authority (Deschamps, 2015), as outlined below, but have not yet been implemented by the CAF.

Concepts and definitions

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[21] As expressed and discussed in the Heyder-Beattie Class Action Schedule O Consultation Group meetings (Fall 2020 and Jan 2021) as well as in related research.

[22] A "one-path" model does not account for differing career paths and challenges faced by women, people of colour, Indigenous people, people who experience disabilities, and LGBTQ2+ people.

[23] The O Group's mandate focused on increasing gender representation and diversity in the CAF. As discussed in the consultation group meetings, in order to increase gender representation and diversity, the CAF must not only recruit and retain more members from diverse groups, but first establish policies and practices that value and welcome them, which requires cultural change. Indeed, feminists have long argued over whether it is even ethical to try to increase the representation of women in male-dominated organizations such as the military due to the great harm they too often experience.

This report uses a variety of terms and concepts that may be unfamiliar to readers. As such, they are defined and explained here.

Sex and gender: Typically, these two concepts are explained by delineating sex as biological (one is born male, female, or intersex) and gender as sociological (one learns to identify and act as a woman, man, transgender person, or gender diverse person). However, these terms are too often conflated, in that sex is viewed as connected to gender (i.e., if a person is female, she is expected to identify and act as a woman). Even the very idea of separating people into a binary of male and female is a constructed one, and therefore not inherently natural.

Cisgender: one whose gender is viewed to be a "match" to one's sex as assigned at birth (i.e., a male who identifies as a man).

LGBTQ2+: an acronym for people who identify as lesbian, gay, bisexual, transgender, queer/questioning, and/or two-spirited with the + to indicate there are many more ways to identify oneself (such as non-binary). This term is constantly evolving. For the purposes of this report, when LGBTQ2+ is used, it includes non-cisgender people.

Gender discrimination: discrimination that occurs on the basis of one's sex and/or gender (taking into account the complexity of how sex and gender are understood as detailed above).

Intersectionality: the complex ways in which multiple forms of discrimination (ability, class, gender, heteronormativity, homophobia, Indigeneity, race) intersect and overlap.

Diverse peoples: people who are minority members of organizations, cultures, and societies. In the military, this would include anyone who is not a white, cisgender, straight, able-bodied masculine man.[24]

Masculinities and femininities: the plural use of masculinity and femininity is a way to disentangle the typically viewed connection between sex and gender. The use of only "masculinity" and "femininity" restricts people's roles and ways of being (i.e., males are often expected to act like masculine men and females like feminine women), which furthers a false gender binary, does not allow for a diversity of gender performances, and discounts the lives of LGBTQ2+ people. In everyday life, men, women, and LGBTQ2+ people enact a variety of masculinities and femininities in complicated ways in different contexts. It is the privileging of one form over another in a particular context by a particular body that is problematic. In the military, the challenge is that particular types of masculinity (hegemonic and militarized masculinity as described in the definitions below, for those who identify as male) and femininity (keeping one's "womanliness" while also balancing it with just the right amount of toughness, as described in the section below) are valued and privileged over others. This creates challenges because it slots men and women into certain roles and expectations with respect to their occupations, job performances, and leadership types, which discriminates those not viewed as "fitting" (i.e., emotional men, stoic women, and LGBTQ2+ people).

Hegemonic masculinity: a type of masculinity wherein what are typically viewed as male traits (toughness, strength, stoicism) are expected to be enacted by men, are societally and organizationally privileged, and result in the privileging of men over women and LGBTQ2+ people.

Militarized masculinity: a type of masculinity that is privileged in military (and paramilitary) contexts, that is a hyper version of hegemonic masculinity that incorporates militarism.

Militarism: the societal and organizational valuing of military ideals, such as hierarchy, obedience, discipline, and uniformity, with life viewed as a zero-sum game (i.e., if one

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[24] Although women are minority members in the CAF and are a designated group in Canada's Employment Equity Act (1995), they are not minority members of Canadian society. Therefore, in this report the phrase "women and diverse peoples" is used to delineate the difference between the two groups as well as recognize their intersectionality.

person/group wins/gains, another must lose), which is patriarchal and colonial, resulting in the othering of those deemed to be different (women and diverse peoples) from the "ideal" societal and organizational member. These values can impede accountability, particularly through unearned privilege.

Unearned privilege: privilege that is granted solely due to one's membership in a particular group, often to those who are white, male, masculine, cisgender, straight, and able-bodied. In military contexts, this results in the privileging of hegemonic and militarized masculinity through a warrior ideal. It is practiced through favouring those who are similar (i.e., deemed a "good fit") in promotion and related opportunities (i.e., postings, training) through an "old-boys network." Those who do not have this privilege face an uneven playing field, making it more difficult for them to succeed organizationally, through no fault of their own.

Warrior ideal: in military organizations, the unearned privileging of white, cisgender, straight, able-bodied masculine men who are perceived to practice hegemonic and militarized masculinity. Those viewed as not fitting into this ideal (i.e., women and diverse peoples) are devalued and discriminated against, which can result in harassment and assault. Although certain people benefit organizationally through this ideal, it is harmful to all and to the organization as a whole.

Continuum of violence: gender and other forms of discrimination are connected to sexual harassment and sexual assault. An organization that ignores, accepts, and/or enables discrimination is one is which sexual harassment and sexual assault are more likely to occur.

Changing forms of masculinity: it is oft-stated that the warrior ideal is a requirement for members of a military organization. However, this ideal is a constructed one that has changed over the years (see Taber, 2018, in relation to the CAF), demonstrating that it is neither inherently natural nor required. In the Canadian militia in the late 19th century, manliness became increasingly equated with militarism; in World War I, swearing, sexualized language, and feminizing the enemy became ways for soldiers to bond; in World War II, the ideal soldier morphed from one who was a stylish officer to one who was rough and ragged; in the 1990s in Somalia, the Airborne Regiment took this to an extreme which included hazing rites that included (sanctioned or, at the very least, condoned) acts of sexual harassment, sexual assault, and racism; and, in the contemporary CAF, the ideal military member (warrior ideal as defined above) is viewed as a male masculine heroic fighter who is unencumbered by a family. The problem with this construction of the ideal military member— and the ways in which it discriminates against women and diverse peoples as related to CAF recruitment, retention, promotion, and leadership practices and polices—is the subject of this report.

Understanding the problem

This section details the need for systemic change with respect to eliminating unearned privilege in CAF leadership, promotion processes, and organizational culture. It discusses the concepts of situated learning and communities of practice to detail how CAF members learn to value a warrior ideal that privileges certain members over others.

Need for systemic change to CAF leadership, promotion processes, and organizational culture
It has been well established that the CAF culture is a sexualized one which requires systemic change (Davis, 1997; Davis & McKee, 2004; Deschamps, 2015; Gill & Febbraro, 2013; Harrison, 2002; Kovitz, 2000; Mercier & Castonguay, 2014; O'Hara, 1998a, 1998b, 1998c, 2014; Park, 1986; Poulin, Gouliquer, & Moore, 2009; Symons, 1990; Tanner, 1999; Waruszynski, 2017; Winslow, 1998; Winslow & Dunn, 2002). This culture, and its associated policies and practices, enables the gender discrimination, sexual harassment, and sexual assault

of women and the sexual harassment and sexual assault of men as well as those who do not identify within this binary (Taber, 2018, 2020). Further, feminization (the gendering of those who are perceived as not able-bodied and not embodying hegemonic and militarized masculinity, whether male, female, or LGBTQ2+) is connected to the privileging of whiteness (Said, 1978). In a military context, those who are marked as not fitting into a warrior narrative are devalued in ways that marginalize and discriminate against not only women and LGBTQ2+ people, but other Employment Equity Act (Canada, 1995) designated groups of Aboriginal peoples, persons with disabilities, and members of visible minorities.

Gender discrimination, sexual harassment, and sexual assault are not discrete concepts but are connected on a continuum of violence against women and those viewed as other; when gender discrimination is present, sexual harassment and sexual assault are more likely to occur (Deschamps, 2015, Kelly, 1987; McMahon, Postmus, & Koenick, 2011; McMahon & Banyard, 2021; Stout, 1991). Therefore, in order to eliminate sexual harassment and sexual assault (which are typically viewed as unacceptable), gender and other forms of discrimination must also be eliminated (though they are often viewed as minor or even accepted, particularly in militarized organizations), requiring widespread cultural change. The CAF has been aware of the need for cultural change for decades, particularly with respect to the experiences of women, but has typically resisted it, only addressing concerns when pressed to do so by the media and outside governing bodies (Davis, 2013; Taber, 2020; Winslow & Dunn, 2002).

CAF policies and practices have historically focused mainly on individual perpetrators of sexual harassment and sexual assault (with an overall acceptance of gender discrimination). This is an insufficient approach, as CAF members are affected by and affect the culture as a whole. As Enloe (2016) describes, the focus should not be on "bad apples" (individuals) because it implies that the organization itself requires no change and is not problematic; if certain individuals are rooted out and stopped, then the problem is perceived to be fixed. However, it is clear that, in the CAF, the entire "barrel" (the organization) is at issue and requires wide-scale cultural change. This metaphor does not mean that everyone in the organization is necessarily culpable, but that the organization sets the culture wherein certain acts are made possible and are even implicitly encouraged or ignored by the chain of command.

Indeed, recent allegations of inappropriate sexual behaviour against two now-former Chiefs of Defence Staff (CDS), General Jonathan Vance and Admiral Art McDonald, as well as the now-former Commander, Military Personnel Command, Vice-Admiral Haydn Edmundson, further demonstrate there is not only an organizational problem, but a leadership one. News of the accusations is particularly hard-hitting because each of these cisgender, white, older men were vocal advocates of ending gender discrimination, sexual harassment, sexual assault, and racism in the CAF (i.e., Vance's Operation Honour, see CDS, 2015; McDonald's Change of Command speech, see Berthiaume, 2021a; Edmundson's responsibility for the Heyder-Beattie file, see Government of Canada, 2021a).

It is not only the nature of the unproven allegations that is concerning but the fact that, in the case of Vance at least, they were known by the organization and Vance was promoted to the CAF's top job anyway (Berthiaume, 2021b). It has now come to light that the Minister of National Defence, the Prime Minister's Office, and the Privy Council's Office knew about the allegations. Not only did they evade responsibility for addressing them, they allowed Vance's promotion to a position wherein he would lead an organization with a documented and serious problem with respect to sexual harassment and sexual assault (Clark, 2021). While the actions of the government are outside the direct purview of this report, it is important to note the ways in which society, the state, and the military are intertwined (i.e., Enloe, 2016). In the case of Edmundson, reports allege that he earned the nickname Mulligan Man for evading disciplinary action as a result of known sexual misconduct allegations in the 1990s (Burke, 2021). Nonetheless, he was still

promoted into a position where he was responsible for addressing and eliminating sexual misconduct.

These three examples are important because they demonstrate that the skills, experiences, connections, and embodiment of these senior leaders (encompassing a warrior ideal) were organizationally valued and therefore seem to have outweighed concerns over their alleged gender discrimination, sexual harassment, and sexual assault of women.[25] It was quite possibly viewed that, due to this warrior ideal, they had a right to be leaders. But leadership is not a right. It is a privilege. How this privilege is earned and bestowed must be problematized and rethought. As Duval-Lantoine explains in relation to how CAF members are generally promoted through the ranks:

> "You could be…an asshole, but if you do your job very well, it might be swept under the rug…And I'm not saying that in a very crude way. But what we reward [in] the chain of command, going up the ladder, and how you go up the ladder, is problematic." (in LaPointe, 2021, para. 21)

With respect to McDonald taking over from Vance in 2021, Lt.-Gen. Christine Whitecross (now retired) was also a candidate under consideration; however, she—the commander of the Canadian Forces strategic response team on sexual misconduct—was not successful (Patel, 2021). The acting CDS who took over from McDonald is Lt.-Gen. Wayne Eyre, another cisgender, white, older man whose biography (Government of Canada, 2021b) matches the one-path model. There is nothing problematic about his appointment *per se*, other than it further reinforces the idea that, in order to become CDS, one's service and embodiment must match a particular ideal.

In summary, what is organizationally rewarded and how military members are promoted must be challenged and changed. It will require a significant rethinking of what the military is and who military members are, with allocated resources for required revisions of policy, doctrine, and practice. If recent events have indicated anything, it is that the CAF cannot continue as it is.

Situated learning in a community of practice based on a warrior ideal

CAF members are socialized and indoctrinated into a military way of life through formal training and informal learning. This report focuses on informal learning in situated contexts to demonstrate how members learn to conform to organizational norms in communities of practice (CoPs). A CoP is a group of people who engage in a joint enterprise that is a key aspect of their own identity (Lave & Wenger, 1991; Wenger, 1998). The military fits into this category because members are not simply workers but are taking on a "way of life" that is all-encompassing (Soeters, Winslow, & Weibull, 2006). Newcomers (i.e., recruits and junior personnel) learn how to think and behave by observing old-timers (training staff, more senior members) and participating in shared tasks, which gradually become more central to the organization's work. This situated learning is an active engaged process that is inextricably connected to one's identity. One not only learns how to be a group member, but also who a member is, how they should act, what they should value, how they should think, to what they are committed. This learning is therefore not focused only on skills (although that is an aspect of it) but on social participation and belonging.

In the CAF, the learning trajectory begins with the recruitment process, and follows through basic training, trade training, on-the-job learning, qualification courses, promotion processes, and

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[25] In a related example, Maj.-Gen Dawe (recently the commander of Canadian Special Operations Forces) submitted a character reference for a Major who was being sentenced for sexually assaulting a retired logistics officer, who was also the wife of another Major under his command, stating that the accused (who served in Afghanistan with him) was "a 'good guy' who deserved a break" (para. 4). No support was given to the victims (Burke & Everson, 2021).

everyday practices. Members learn to accept uniformity, collectivity, and obedience, which requires conforming to military norms and a warrior ideal (Taber, 2020).

In the CAF, there is an unearned privilege afforded to those newcomers who are viewed as fitting into this warrior ideal (white, male, masculine, cisgender, straight, and able-bodied). These newcomers have a clear path to core membership, which is enabled by favouritism, the "old boys network," the belief they are always already dedicated to the military, and their being viewed as a good organizational fit with whom others want to work and promote.

Learning trajectories are laden with power in that, newcomers who do not fit into organizational expectations can have their participation inhibited by old-timers, their path to core membership blocked, and may be forced to leave the organization (Barton & Tusting, 2009). This power can be heavily gendered in the ways in which it values particular forms of masculinities and femininities while devaluing others, in related communities of practice (Paechter, 2003, 2006). In a military organization created by and for white cisgendered able-bodied masculine men, simply being female, LGBTQ2+, a person of colour, Indigenous, or differently abled (or any intersectional combination of these identities) can inhibit one's ability to succeed (i.e., Eichler, 2016; Kovitz, 2000; Poulin, Gouliquer, & Moore, 2009; Scoppio, 2009; Taber, 2011). The CAF promotes a warrior ideal wherein a tough strong able-bodied heroic masculine military member is expected to dedicate *his* entire career to the organization; be always ready, willing, and able to deploy, participate in training, and be posted; and, have a spouse who can care for any children and family members (Taber, 2009). In Davis' (2013) words, the privileged norm is a "combat masculine heterosexual warrior identity" (p. 243).

This warrior ideal is promoted in CAF leadership doctrine documents (Taber, 2009), such as *Duty with Honour* (CDS, 2003) which functions as "boss" or guiding texts that "regulate other texts and everyday practices in their institutional context" of the CAF (Taber, 2009, p. 29). This doctine frames all CAF orders by "establish[ing] the intellectual and doctrinal basis for all personnel and professional development policies in the Canadian Forces" (CDS, p. 2). *Duty with Honour* promotes the ideal military member as one who is "'disciplined, fit and … tough'" (Taber, 2009, p. 31), a male "'real fighter,'" (p. 32) dedicated to the military above all else within a "combat ideology and hypermasculine military culture" (p. 31).

As a result, military members who are perceived as not fitting into an ideal warrior norm are organizationally discriminated against—in policy and in practice—due to gender, race, Indigeneity, ability, and sexual orientation. Certainly, members of designated groups have performed well in the military and have been promoted into senior ranks, but they face barriers that are not typically experienced by those who appear to fit the norm of an ideal warrior.

Women in particular often feel as if they are the "token woman" under a "'ubiquitous microscope'" or an "'annoying spotlight'" that follows them throughout their service, wherein they are continually having to prove themselves (Taber, 2016, pp. 52, 53). They can be viewed as not dedicated to the organization merely due to the fact their body holds the possibility of future pregnancy, as demonstrated by one women who was told, on her first day in her operational unit, "'You better not get pregnant while you're here'" (Taber, 2011). Women's service is constrained by walking a "tightrope of gender performativity" (Taber, 2011, p. 346) in order to "conform to the old-timers' definition of [military] membership" (p. 344). Women continually negotiate their gender in a male culture that requires them to be tough but not too masculine, and are often valued because it is believed they can bring in "feminine" leadership qualities and "soft" skills, furthering the false dichotomy of male/masculine, female/feminine, and esentializing women's service to their gender (Taber, 2016).

Instead of gendering leadership and skills, Davis (2009) argues for a focus on cultural intelligence, a meta-competency that "facilitates understanding, perception and adaptability within multicultural ethnic and organisational contexts" (p. 432). It "demands the capacity to

adapt to and understand difference, including differences that challenge dominant beliefs regarding the role of sex and gender within organisations and societies" (p. 432). Cultural intelligence is not only a better way of conceptualizing attitude, skills, and knowledge—as relates to self-reflexivity, cultural understandings, equity, and related decision-making—but it is something that should be honed and practiced by all CAF members, which will benefit the organization as a whole (Davis, 2009). It includes, among other things, "being aware of our own assumptions, ideas and emotions," having an "open mind," "seeking out fresh information," and, "using empathy" (Thomas as cited in Davis, p. 433). Cultural intelligence can be taught and learned; it is not something that is innate. Davis argues that cultural intelligence can enhance operational effectiveness, demonstrating that a critical GBA+ lens can be useful not only from an equity perspective, but from an operational one.[26]

Admitting that one may have been wrong in the past, does not know something, and needs more information to understand an issue and take action can be an uncomfortable expression of vulnerability, particularly for military members trained to exhibit strength and confidence. Indeed, asking military members to question a warrior ideal is asking them to question the military itself, which can be a difficult task. However, being willing to do so should be organizationally valued and rewarded, in formal education and in situated learning contexts through feminist transformative learning (i.e., English & Irving, 2012), as well as in recruitment, promotion, and leadership doctrine, policies, and practices.

In summary, too many of those who face CAF organizational barriers to core membership are funnelled out of the CAF as relative newcomers, with the organization losing their skills and experience. Those who may want to challenge the CAF's masculinized and sexualized culture in order to remove these barriers may fear doing so as any organizational critique could negatively affect their own performance evaluations and promotion opportunities. Senior leaders who have benefited from the warrior culture are in the position to make change, but have generally benefited from organizational norms, and may therefore believe there is little need for structural change. Therefore, those who become old-timers in the CAF are more likely to conform to organizational norms than to challenge them.

The following recommendations detail how to implement this research in concrete ways that will work to increase the recruitment and retention of women and diverse peoples by changing the CAF's masculinized and sexualized culture as well as its approach to leadership and promotion. The recommendations are not exhaustive but are focused on the Heyder-Beattie Class Action Schedule O Group's overall mandate and this Subject Matter Expert's specific one.

Recommendations: Systems, policies, and conceptual changes

There is a plethora of research about the ways in which women and diverse peoples can be equitably supported and therefore recruited into and retained in the workplace. The examples listed below emerge from the research discussed above and demonstrate just a few instances of this wide body of literature from various disciplines as relates to a variety of workplaces—including the military—and represent the literature as a whole.

This report focuses on the literature about the recruitment, retention, and promotion of women in male-dominated masculine organizations as this is where the greatest body of literature

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[26] There is a multiplicity of ways in which these skills can be conceptualized (i.e., human skills, interpersonal skills, emotional intelligence, character-based leadership, intersectional ethics), each of which have their own arguments for and critiques against. A fulsome discussion of this body of research is beyond the scope of this report. What is important to note here is that these skills should not be conceptualized as gendered and that they are required not only from an equity standpoint but support an operational one.

lies[27] and there seems to be something about women in particular that engages resistance in military organizations. For example, the CAF aimed to increase the representation of designated groups[28] from 2016 actuals to 2026 targets as follows: women, 14.9% to 25.1%; Indigenous peoples, 2.6% to 3.5%; visible minorities, 6.7% to 11.8% (Fuhr, 2019). In 2016, Canadian society was approximately 50% women, 4.3% Indigenous, and 19.1% visible minorities (Demography Division, 2016). Therefore, the 2016 ratio between military membership and society is: women 14.9/50=29.8%, Indigenous peoples, 2.6/4.3=60.4%, visible minorities, 6.7/19.1=35%, demonstrating that, out of all three groups, women are most underrepresented and have lower targets to increase representation.

Women and diverse peoples largely experience discrimination, sexual harassment, and sexual assault due to their positioning as organizationally devalued feminized others who do not fit into a warrior ideal. Therefore, challenging the unearned privilege afforded to those who are viewed as fitting into this ideal—with respect to who a military member is, what path a military career should take, who is viewed as a leader, and who is promoted—should improve the equitability of the organization for all peoples.

Supporting evidence

As a whole, the literature demonstrates that women can be recruited and retained through eliminating the unearned privilege of particular organizational members by: changing hegemonic masculine organizational cultures; eliminating gender stereotyping, discrimination, sexual harassment, and sexual assault; developing gender equitable policies that positively affect organizational practices; creating adaptive career paths as well as flexible work options; supporting childcare and families; promoting women into leadership positions; and, providing opportunities for the increase in numbers of women throughout the ranks, to be seen as role models and mentors.

- **Academia**: "universities need to take into account the ways in women's varying commitments to paid work, education and responsibilities in the homeplace results in learning trajectories that are frequently complicated and non-linear" (Gouthro, Taber, & Brazil, 2018, p. 36). Policies and practices with associated promotion processes must be adapted to take into account the reality of women's lives.
- **Engineering**: women who were given "care and support, feedback, high-level opportunities and responsibilities, and role models" (Fernando, Cohen, & Duberley, 2018, p. 485) were more likely to experience "feeling positive about the organisation's climate and seeing a future in engineering" (p. 486).
- **Finance**: "stereotype threat among women in finance is associated with identity separation, poorer well-being at work, and a decreased willingness to recommend banking and finance as a career option to young women. These findings provide further evidence that stereotype threat may lead to disengagement in the workplace and impair the recruitment and retention of women in finance and thus is a concern for organizations and for the women who work in them" (Hippel, Sekaquaptewa, & McFarlane, 2015, p. 412).
- **Geosciences**: to improve the recruitment and retention of women, there is a need to, among other things, ensure "equity and equality gender policies and strategies are

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[27] There are complex reasons for the focus on women as opposed to diverse peoples in the literature beyond the scope of the report.

[28] LGBTQ2+ peoples are not a designated group as delineated in the Employment Equity Act and there are no specific recruitment targets for them.

embedded at high levels of organizations …[with] a clear commitment to change," "advocate for more women in prestige roles," "redefine success," "eliminate and actively address everyday sexism and harassment" (Handley, Hillman, Finch, Ubide, Kachovich, & McLaren, *et. al*, p. 222).

- **IT**: women face barriers due to "isolation and exclusion," "poor supervisory relationships," and "work-life conflict" (Annabi & Lebovitz, 2018, p. 1060). In order to address these concerns, there is a need to, among other things, "build a culture that supports diversity" and "provide flexible arrangements" (p. 1063) with a "focus on fixing the environment, not 'fixing the women'" (p. 1067) in order to retain women.

- **Law**: women were more likely than men to leave private practice "in order to find work environments that allow them to balance their career and family, that allow flexible work arrangements, that do not require a workload which is too heavy, that are less stressful, and provide that paid maternity/parental leave as well as other benefits" (The Law Society of Upper Canada, 2013, p. 19).

- **Police**: creating family-friendly policies, allowing job-sharing, and providing for family leave "will not only attract more women to law enforcements but also ensure that they stay long enough to have a full career" as will changing the "male dominated police academy and police culture" and "strengthening sexual harassment policies" (Cordner & Cordner, 2011, p. 222).

- **Military**: the literature discussed in the "Understanding the problem" section above sets the context for the specific quotations cited here that directly relate to the mandate of this report.
    - commanders who "prioritize caring for members and their families (within the context of the mission)" (King, DiNitto, Salas-Wright, & Snowden, 2020, p. 690) should be prioritized for promotion; the chain of command should ensure that "macrolevel diversity and retention priorities are understood and supported locally" by commanders (p. 691); and, "rigid career paths and requirements to move frequently" (p. 691) should be rethought by "developing alternative career paths (or pauses in the fast track), and permitting homesteading [settling in one location]" in order to "positively impact women's retention" as well as men's (p. 692).
    - "the military's structured career paths and rigid 'up or out' promotion policy create a 'fast track' that institutionally penalizes people who disrupt the career trajectory. ... Professions that do not show that they value their newly qualified employees and their families will continue to face a talent retention problem. Recent military talent management initiatives (e.g., increased parental leave, career intermission programs, increased childcare availability, opening all occupational specialties to women, increased female accessions, and creating an environment intolerant of sexual assault) send positive signals to women (and men) at all stages of their career that the military values and respects them and their work–family intentions" (Smith & Rosenstein, 2017, p. 275).
    - "effective responses from the chain of command [with respect to reporting gender discrimination and sexual harassment] were associated with decreased emotional distress and increased retention intentions. Additionally, ineffective or negative responses from the chain of command were associated with increased emotional distress and decreased retention" (Daniel, Neria, Moore, & Davis, 2019, p. 367).

The following delineates how to implement best practices discussed in the literature above into CAF leadership and promotion processes. They are separated out for discussion purposes but are interlinked through removing the unearned privilege which some members are granted because they are viewed as fitting into a warrior ideal, redefining who an ideal member is from an equity perspective, and valuing equity throughout the promotion system and associated doctrine, policies, and practices. This will result in a multiple path model that would enable diverse members to become CAF leaders. These recommendations must be properly implemented, resourced, maintained, and evaluated in an intentional, holistic, and systemic way to ensure their success. It should be noted that these recommendations mirror and/or are complementary to those in the Deschamps (2015) report and the Canadian House of Common's Standing Committee on National Defence (Fuhr, 2019).

Recommendations: for the CAF
1. Widespread and thorough cultural change to remove unearned privilege and challenge the warrior ideal as well as eliminate hegemonic and militarized masculinity.
2. The entire career progression system (from recruiting intake, to basic training, to leadership courses, to promotion through the ranks) should be reconceptualized and reworked through a GBA+ lens.
   - Career progression should value and reward GBA+ awareness, knowledge, understanding, informed decision-making, accountability, education, resource allocation, advocacy, and cultural intelligence. These leadership aspects should be valued and rewarded as much as occupation-specific capability.
   - Recruiting centres, career managers, merit boards, and succession planning boards should include women and diverse peoples and all should be trained in how to recognize and mitigate unconscious bias with specific respect to hiring and promotion. Recruitment and promotion should not be conducted solely through the attainment of qualifications or because someone is viewed as an ideal warrior.
   - The personnel assessment system should value and reward skills and actions related to cultural intelligence, intersectional feminist ethics, empathy, respect, and inclusive practices, as well as GBA+ concrete action to prevent/address/deal with gender/diversity discrimination, sexual harassment, and sexual assault.
   - Leadership doctrine such as "Duty with Honour" should be reconceptualized and rewritten so an ideal warrior narrative that discriminates against women and diverse people is not promoted. This entails redefining who an ideal military member is from a GBA+ perspective.
3. Adaptive career paths should be established, valued, and supported in order for women and diverse peoples to be promoted through the ranks into leadership positions. Although some points in the list below already exist in the CAF (i.e., maternal and parental leave, day care centres, military family resource centres) they need to be integrated into military life so members who take parental leave, for instance, are not penalized for it, either directly or indirectly; childcare should better accommodate shift workers and the requirement to always be ready for duty and deployment; and, family support should be valued as part of the mission, not simply as enabling it. This would entail further rethinking of attitudes, policies, and practices with respect to:
   - the Universality of Service order and soldier-first principle
   - maternal and parental leave
   - childcare and family support
   - training opportunities and associated prerequisites

- posting system
- recognition of the negative effects of discrimination, harassment, and assault on performance

4. There should be not only a critical mass of women and diverse peoples in leadership positions but all must engage in GBA+ critical acts with associated resources.

5. The particular reticence of middle-managers (i.e., those at the junior officer and junior non-commissioned officer levels) to value and engage in GBA+ should be further researched in order to craft specific recommendations for this group. Anecdotal evidence suggests members at the middle-management level fear that supporting GBA+ by acting against gender and diversity discrimination, sexual harassment, and sexual assault can negatively affect their promotion prospects. The results of this research should be made publicly available.

6. Reframing concepts and skills through the lens of equity:
   - The definition and understanding of who an ideal military is and should be must be reconceptualized so it does not privilege a male, masculine, cisgender, white, able-bodied norm. A beginning definition of an ideal military member would include a person of any ability, gender, culture, race, religion, and sexuality who is: skilled at their trade (regardless of whether it is operational or support), willing to learn, open-minded, inclusive, caring, empathetic, accepting, culturally intelligent with a feminist intersectional ethics, and engages in GBA+ practices.
   - The idea that there is a "pink list" (and related thinking) that allows (perceived to be) unqualified women access to leadership courses over (perceived to be) better qualified men should be contested and abandoned. It should be made clear that employment equity and related policies remove unearned privilege (i.e., white cisgendered masculine men who may be on the list because they are organizationally valued over others) in order for those without this privilege to be treated equitably. A women or diverse person who is promoted is not taking someone else's spot or being promoted only because they are a woman or diverse person, but is a qualified member who may otherwise have been passed over for promotion due to organizational barriers to their success and the unearned privilege of certain other members.
   - There should be no distinction between what is oft-termed "soft skills" and "hard skills" (or related "feminine" and masculine" leadership styles) in performance evaluations and promotion considerations, as it further promotes a false gender binary wherein the former is often associated with women/femininity and the latter with men/masculinity, which essentializes gender differences and genders leadership styles and actions. Further, if one type is perceived to need to take second place to the other, as hard skills and masculine leadership styles are typically viewed as more valuable, they will take precedence. Instead, cultural intelligence should be encouraged. The ability to navigate a ship and empathize with subordinates should be equally valued as there are unquestionably people who can do both. Cultural intelligence (or a related concept) is crucial for all members of the organization (regardless of gender or diversity) and of benefit to the organization. Cultural intelligence should therefore also be a key consideration in performance reviews and for promotion decisions (short-term implementation).

7. Sufficient resources must be dedicated to these recommendations with an accountability mechanism. As hierarchy can impede accountability, and the CAF is a hierarchical organization, there should be an accountability mechanism through an external body.

Conclusion

Implementing these recommendations, in congruence with those of the two other O Group SME's, will enable the CAF to increase gender and diversity representation in an ethical manner so that women and diverse peoples are organizationally valued and supported. This implementation requires a significant shift in who is perceived to be an ideal military member and leader (in policy, doctrine, and practice); such a shift is of benefit not only to military members, but to the organization as a whole. Eliminating unearned privilege in leadership and promotion processes and practices is a key aspect of addressing organizationally embedded gender and diversity discrimination, which can in turn reduce sexual harassment and sexual assault.

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If you build it, they will come: (Re)building an inclusive, diverse, equitable and accountable Canadian military through education

Consultations on Gender Representation and Diversity in the Canadian Armed Forces
Subject Matter Expert Report of Roadmap for Change through Education
Dr. Grazia Scoppio, GS Global Consulting

Preamble

Historically, the Canadian Armed Forces (CAF), seems to implement social change in *reaction* to complaints and tribunal decisions, rather than proactively. Indeed, this report itself is part of the measures to be implemented in response to a recent settlement agreement stemming from a court decision. Between 2016 and 2017, seven former members of the CAF initiated class actions lawsuits, the "Heyder and Beattie Class Actions", against the Government of Canada, surrounding issues regarding sexual misconduct in connection with their military service and/or employment with the Department of National Defence (DND) and/or Staff of the Non-Public Funds, Canadian Forces (SNPF) (CAF-DND Sexual Misconduct Class Action Settlement, 2019). On November 25, 2019, the Federal Court approved a settlement agreement that, in addition to providing compensation to current and former members of the CAF, DND and SNPF who experienced sexual misconduct, stipulates further requirements, including "the option to participate in a restorative engagement program for survivors to share their experiences of Sexual Misconduct with senior CAF and/or DND representatives", and "Changes to CAF policies and other measures addressing Sexual Misconduct in the CAF" (CAF-DND Sexual Misconduct Class Action Settlement, 2019). In line with these additional stipulations of the settlement, Gender Representation and Diversity Consultations were held in 2020-21 between representatives from the class action, representatives from the CAF, and Subject Matter Experts (SMEs), regarding increasing gender representation and diversity in the CAF. While the consultations had to be moved virtually due to COVID-19 limitations of in-person gatherings and travel, the consultation group worked hard and steadily despite these constraints caused by the pandemic. This report is one of the SME reports stemming from the consultations' discussions, which identified '*education*' in the CAF as one of the focus areas that need to be addressed. This report draws from the author's expertise and research in the areas of education and diversity in military organizations, select literature and best practices in this domain.

This report's premise is that, despite past and current efforts to increase representation rates of women in uniform, the CAF has failed to achieve true gender diversity and inclusion across the organization. This, in turn, negatively affects operational effectiveness and the legitimacy of the armed forces in the eyes of Canadian society. In order to understand this complex problem, there are multiple issues to consider, including systemic issues of sexual harassment, organizational un-willingness to learn lessons from past experiences coupled with un-responsiveness to social change, and the flawed belief that one-shot, one-size fits all training will resolve these issues. Ultimately, the approach to 'just add women to the military and stir' did not work. In order to move the CAF forward and achieve social change in the organization, as well as shape behaviours and attitudes within its membership, a career long *educational program with a foundation in inclusion, diversity, equity and accountability values* is the key. Undeniably, there needs to be accountability built into a new education program so members are aware of the ramifications of their actions should they persist or breach any policy, code or law.

Understanding the problem

Systemic issues

The CAF is a recognized leader in terms of gender representation and for being one of the first countries to open all military occupations to women in 1989, except for submarine service occupations, which were opened in 2001 (Department of National Defence and the Canadian Armed Forces, 2020). However, over the past 30 years, after that landmark policy change, the number of women serving in the CAF has been increasing very slowly and seems to have reached a plateau. As of 2020, the representation rate of women serving in the CAF was 16% overall (15.8% in the Regular Force and 16.6% in the Primary Reserve), a far cry from achieving a goal of 25% women in the CAF by 2026 (Department of National Defence and the Canadian Armed Forces, 2020). The reasons for the low representation of women in Canada's military include "occupational segregation, challenges regarding balancing military demands with family life, concerns of sexual harassment and sexual misconduct, a very traditional and hierarchical organizational structure, and a closed organizational culture" (see Deschamps, 2015, Earnscliffe Strategy Group, 2017, Scoppio, Otis & Yan, 2018, cited in Scoppio, Otis, Yan & Hogenkamp, 2020, p.2).

Through the years, the CAF has been plagued with long standing systemic issues related to sexual assault and sexual misconduct which have been investigated by the media (O'Hara, 1998; Mercier & Castonguay, 2014), examined by researchers (Gill & Febbraro, 2013; Cotter, 2019) and documented through the Deschamps report (2015). Former Justice Marie Deschamps, the External Review Authority regarding Sexual Misconduct and Sexual Harassment in the CAF, reported that "there is an undeniable link between the existence of negative and discriminatory attitudes towards women in the CAF, the low representation of women in senior positions in the organization, and the prevalence of sexual harassment and assault" (2015, p. 24).

Un-willingness to learn lessons and un-responsiveness to social change

As stated at the outset of this report, it is important to acknowledge that the CAF seems to implement social change in *reaction* to complaints and tribunal decisions, rather than proactively. Social change is defined in sociology as "the alteration of mechanisms within the social structure, characterized by changes in cultural symbols, rules of behaviour, social organizations, or value systems" (Encyclopædia Britannica, 2020). In the context of organizations, as societies evolve, so should organizations, including the military. The CAF, therefore, should keep changing *proactively with* Canadian society, to reflect societal cultural and values evolutions, and to maintain legitimacy in the eyes of Canadian society. However, historically, this has not been the case.

Several examples of the reactionary approach of the Canadian military towards social change, can be found through its history. The policy change to allow women to serve in all military occupations stemmed from a complaint by four members of the Canadian Forces, Isabelle Gauthier, Marie-Claude Gauthier, Georgina Anne Brown and Joseph Houlden, who "believed it was wrong that women were prevented from having roles in combat positions or combat-related jobs, just because they were women" (Canadian Human Rights Commission, n.d., p.1). Following their complaint of discrimination based on sex, under the Canadian Human Rights Act, a landmark Canadian Human Rights Tribunal decision in 1989 directed the CAF to remove all employment restrictions and integrate women in all military occupations (Canadian Human Rights Commission, n.d.). Another example is the former policy of 'punishing' or 'purging' Lesbian, Gay, Bisexual, Transgender, Queer, Two-Spirit or another non-binary gender or minority sexual identity (LGBTQ2+) members serving in the Canadian military, a discriminatory policy that was reversed, following once again a court challenge in 1992 (Levy, 2020). Such examples can be found in other militaries around the world, including in the United States military, where the 'Don't Ask, Don't Tell' policy, a 17-year-old law banning openly gay men, lesbians and bisexuals from serving in the military, was finally repealed in 2011, after numerous constitutional challenges (Feder, 2013; Bumiller, 2011).

These examples reflect on the one hand, the reactionary approach of the CAF, and military organizations more broadly, towards social change due to their 'closed', traditional, and patriarchal organizational culture and hierarchical structures, and on the other hand, the organizational failure to learn lessons from past mistakes.

One-shot, one-size fits all training is not the answer

Another recurring organizational weakness of the CAF is the flawed view that one-shot, one-size fits all training is an effective way to address some of these challenges. Again, we find examples of this throughout the history of the CAF. In the aftermath of the failures of the Canadian peacekeeping mission to Somalia, culminating in the torture and killing of a Somali teenager by members of the Canadian Airborne Regiment, and in response to the Report by the Somalia Commission of Inquiry (1997), the CAF implemented mandatory training for all personnel, called Standard for Harassment and Racism Prevention (SHARP). Unfortunately, SHARP and other similar training, were "based on two faulty assumptions: the first is that stand-alone, one-shot training/briefings were enough to last a career; the second is that one program fits all requirements from private recruit to general officer" (Scoppio, 2004, p. 226). To be sure, in 2002, the Minister's Advisory Board on Canadian Forces Gender Integration and Employment Equity, deemed that existing employment equity and diversity related training delivered by the CAF, such as Leadership in a Diverse Army and SHARP, were "a patchwork of reactive diversity training" (Department of National Defence, 2002). Instead, the Board encouraged the adoption of a "Respectful Workplace Education Program" that will form the basis of career-long learning to recognize, acknowledge and value diversity… [which] must include learning to understand group dynamics, learning interpersonal communication and problem-solving strategies in diverse groups. It must also include learning about basic dignity, decency and human rights, as well as issues that are specific to women, Aboriginal people and visible minorities" (Department of National Defence, 2002). To date, this kind of career long Respectful Workplace Education Program does not exist in the CAF. With that said, over the years, various materials on diversity and employment equity, as well as on sexual harassment and misconduct, have been included in CAF training and professional development; however, often these materials are 'canned presentations', they are not delivered by SMEs, nor do they have the level of breadth and depth required.

Having acknowledged these systemic issues and organizational shortcomings, it is only fair to also recognize recent organizational efforts to implement new strategies and policies to address issues related to sexual misconduct as well as employment equity and diversity more broadly, such as Operation Honour, the *Canadian Armed Forces Diversity Strategy*, the *Strong, Secure, Engaged* Defence Policy, and *The Path to Dignity and Respect* (Government of Canada, National Defence, 2021, 2016, 2017, 2020b). However, we must also realize that changes to strategies, policies and processes are important, but clearly not sufficient.

Moving forward through inclusion, diversity, equity and accountability education

To move forward and evolve as an organization, the CAF needs to develop and implement a new, comprehensive and career-long Inclusion, Diversity, Equity, and Accountability (*IDEA*) educational program, mandatory for all Officers and Non-Commissioned Members (NCMs) and integrated over a member's career starting from a recruit, through General and Flag Officers.

Goal

The goal of developing the *IDEA* educational program is to implement real social change in the CAF, and ultimately to truly include, value and integrate women in a meaningful way in the

organization, as well as LGBTQ2+ members, and other diverse groups, across all military ranks, occupations, and Services, and to tap into their unique strengths and diverse perspectives.

GBA+

When creating the *IDEA* program, Gender-based Analysis Plus (GBA+) should be used as an analytical tool both in program development and delivery to ensure that gender and intersectionality factors are always considered (Government of Canada, Status of Women Canada, 2020).

Foundation in inclusion, diversity, equity and accountability values, laws and policies

The new *IDEA* educational program should have a foundation in the values of inclusion, diversity, equity, and accountability grounded in relevant legislation and policies, as well as related key constructs, knowledge and skills.

Inclusion is first because we must welcome with open arms all members of society first and foremost. Inclusion means actively and intentionally leveraging and promoting the full participation and sense of belonging of every member of the organization (Center for Creative Leadership, 2021).

Diversity is next, as we must accept all the visible and invisible differences and identities that make us unique, and mutually adapt to individuals from all walks of life. Diversity encompasses gender, sex[29], ethnicity, culture, language, religion, ability and disability, education, socio-economic background, sexual orientation and other identities.

Equity follows, to accommodate individuals and workplaces to ensure equality for everyone and create a level playing field. Equity is not about treating everyone the same; it is about "acknowledging and accommodating differences rather than ignoring and denying them" (Abella, 1984, p. 13).

Accountability is always present and applied fairly and without bias across the organization and society 'as a whole' for the betterment of everyone. In this way, once we have welcomed in all members of society, while accepting their differences, made accommodations and created equality for all, then we can objectively apply accountability fairly to everyone.

Inclusion, diversity, equity and accountability values are grounded in Canadian laws including the Charter of Rights and Freedoms, the Human Rights Act, the Multiculturalism Act, and the Employment Equity Act, which applies to the CAF since 2002 (Government of Canada, Department of Justice, 1982, 1985a, 1985b, 1995, 2002). Additionally, there are related CAF policies, the Defence Administrative Orders and Directives (DAOD) such as DAOD 9005-1, Sexual Misconduct Response (Government of Canada. National Defence, 2020a).

Key constructs and knowledge

Additional key constructs and knowledge that should be incorporated in the program include:

- Personal bias, harassment, discrimination, racism, bystander intervention, and micro-aggressions.[30]

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[29] It is important to include both sex and gender, as they are "often – incorrectly – used interchangeably. Both need to be understood and carefully considered…Gender refers to the roles, behaviours, activities, and attributes that a given society may construct or consider appropriate for men and women. It can result in stereotyping and limited expectations about what women and men can and cannot do…. Sex refers to a person's biological and physiological characteristics" (Government of Canada, Status of Women Canada, 2020).

[30] Microaggressions are "the everyday verbal, nonverbal, and environmental slights, snubs, or insults, whether intentional or unintentional, which communicate hostile, derogatory, or negative messages to target persons based solely upon their marginalized group membership" (Sue, 2010).

- Intersectionality, including intersections of gender, race, ethnicity, sexual orientation, generational, culture and other diversity identities to better understand how "social exclusion or privilege occurs differently in various social positions…by focusing on the interaction of multiple systems of oppression" (Romero, 2017, p.8).
- Women and gender issues in the workplace, including women in the military, sexual misconduct, social constructions of gender roles, gender stereotypes, and gender equity.
- LGBTQ2+ issues in the workplace, including LGBTQ2+ members in the military, human rights violations and discrimination against LGBTQ2+ members.
- Indigenous issues in the workplace, including systemic racism, the role of Indigenous people in the military, and understanding of Indigenous cultures.
- Visible minorities and people with disabilities issues in the workplace, including racial and disability discrimination and harassment.
- Culture and organizational cultures, including the dimensions of culture and sub-cultures; how organizational cultures are created and taught to new members; how leaders can shape and transmit culture; and implementing cultural change in organizations (Schein & Schein, 2017).
- Military culture, including the warrior framework, hegemonic masculinity, culture of misogyny and homophobia, Military Sexual Trauma (MST) affecting both male and female survivors (O'Brien, Keith & Shoemaker, 2015).
- Gender issues in defence and security contexts, including the North Atlantic Treaty Organization (NATO) Resolution Women, Peace and Security agenda launched on 31 October 2000 with the adoption of United Nations Security Council Resolution 1325 (NATO, 2020).
- How to apply GBA+ at the CAF strategic, operational and tactical level (Government of Canada, Status of Women Canada, 2020).
- How to foster an inclusive, diverse, equitable and respectful work environment.
- How to foster a safe space in the workplace, that is to say, a place "intended to be free of bias, conflict, criticism, or potentially threatening actions, ideas, or conversations" (Merriam-Webster, 2021).

Critical skills to work in diverse environments

Through the program, CAF members should further develop a variety of skills that are critical to work effectively in diverse environments, both in Canada and abroad, within diverse teams, including civilian members, other government departments, allied militaries, and other groups.

These types of skills are at times referred to as 'soft skills', 'employability skills', 'non-academic skills' or other terms, but regardless of the term used, these skills, competencies, attributes, behaviours and characteristics are crucial to make someone able to work respectfully in cross-cultural and diverse environments, and capable to work with others.

Critical skills to work in diverse environments that should be developed through the new *IDEA* program include:
- Willingness to learn;
- Professionalism / ethics;
- Cultural awareness / diversity;
- Interpersonal skills / social skills;
- Self-management;

- Building and maintaining trust;
- Team building / collaboration;
- Flexibility / adaptability;
- Conflict resolution / problem solving;
- Leadership / decision making;
- Diplomacy;
- Communication verbal and written / active listening;
- Critical thinking; and,
- Imagination / creativity (adapted from Scoppio & Schock, 2011).

Career long educational program

The new *IDEA* program should be a standalone, progressive, career long educational program, and should not be made to fit into existing structures of CAF training and professional development, like trying to fit a square peg in a round hole. Existing activities in this domain within the CAF are inadequate, incoherent, and uncoordinated, and are often 'training' programs rather than 'educational' programs. It is vital here to outline key differences between training and educational programs. An educational program aims to provide a base of knowledge and intellectual skills[31], as well as other skills, upon which information can be correctly interpreted and sound judgement exercised. In contrast, a training program aims to develop job- or occupation-specific skills and knowledge to perform specific tasks, which can be clearly observed, and which have a beginning and an end, such as operating equipment (Scoppio, 2009).

The program should include as a minimum four levels, which would correspond to a minimum of four, or more, courses: an introductory level; a basic/foundational level; an intermediate level; and an advanced level. An approximate duration for each course could be on average two weeks of full-time learning. The duration of each course could vary depending on the program level as each of the four levels should incrementally increase in content depth and account for the higher responsibilities of members as they progress in rank. In other words, intermediate and advanced levels courses could have a longer duration than introductory and basic/foundational level courses. Additionally, each course should build on each other and course content should speak to the different audiences in each level. The higher-level courses should involve higher levels of learning and include content related to 'managing' the workplace and addressing issues at the outset, such as any inappropriate comment or action, and preventing recurrence or escalation of similar violations. Courses should be updated regularly to include new research, literature, policies, and legislation, as well any positive or negative developments and events affecting the CAF that may have come to light, which can be used as 'case studies' and provide learning opportunities.

Mandatory '*IDEA* days' should be established, that is to say, continuous learning events delivered regularly in every CAF unit by qualified professionals, to allow members to refresh their knowledge, acquire updates on legislation and policies, and engage in dynamic and meaningful discussions. The frequency, duration and format of these learning events could vary; for example, they could be delivered quarterly as a half day of 'formal' learning, followed by half day of 'informal' learning through small break out discussion groups to provide a casual environment for members to feel comfortable to speak up and share relevant experiences. Various learning checks should also be in place, ranging from questions on legislations and policies updates, to self-reflections on how to apply in practice the concepts or skills learned.

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[31] Intellectual skills can include for example, information processing skills, reasoning skills, mathematical skills, language skills, and graphical skills (Drummond and Selvaratna, 2009).

These learning events should not be 'tacked-on' to existing annual briefings that are usually carried out in CAF units through 'canned presentations', with little or no interactions with participants.

Successful completion of each level of the program and the continuous learning events should be tracked for all personnel over the years. This would prevent significant numbers of violations such as sexual misconduct from occurring in the first place, since the members would be more aware due to completing the program and annual learning events, and due to the tracking mechanisms in place as a deterrent. This data could be drawn upon, if deemed appropriate, in cases of alleged breach of conduct brought forth against another member and used as evidence that the individual was aware of the ramifications of their actions and what was unacceptable because they had been provided this information annually and the member had successfully completed the continuous learning events each year.

Additionally, while the new program will have intrinsic benefits of developing CAF members and leaders with the requisite knowledge, competencies and skills in the context of inclusion, diversity, equity and accountability, tangible extrinsic benefits could include a certificate upon completion of the program.

Best practices

The *IDEA* program should draw from best practices in adult education, transformative learning, program development, design and delivery. The new program should be developed using adult education principles and best practices, including experiential learning, contextual learning, and active learning, to ensure that the learning is relevant and meaningful for all CAF diverse adult learners (Collins, 2004; Imel, 2000). Examples of experiential learning include having students share their experiences during residential components of the program, as well as inviting guest speakers, ranging from experts in the field to survivors of sexual misconduct, using a trauma-informed approach, by being sensitive to the impact of trauma as well as recognizing the signs and symptoms of trauma, and avoiding re-traumatization (Substance Abuse and Mental Health Services Administration, 2014). The program should also adopt a transformative learning approach, whereby "students are able to form new understandings and take action on these changed perspectives" (Shepard Wong, 2006, p.1). Transformative learning experiences should be enabled though supportive learning environments that "encourage investigation and reflection in conjunction with opportunities for meaningful, sustained, face-to-face interaction among people who are different from one another, whether socially, economically, ethnically, culturally, or ideologically (Shepard Wong, 2006, p.1).

Following best practices in instructional design, the design and development should be conducted by an intergenerational and interdisciplinary team to include volunteer members of the class action; civilian experts and uniformed members with a background in diversity, gender issues and employment equity; instructional designers; multi-media and web developers. An intergenerational team is needed to design the program with a view to understand CAF members' generational differences and their interactions and engagements with each other, as four generations currently co-exist within the workforce, including the CAF (Baby Boomers, Generation X and Generation Y/Millennials), and a fifth generation (Generation Z) is ready to enter the workforce (Burton, Mayhall, Cross & Patterson, 2019).

Best practices for learning strategies should also inform program delivery (see Hartwell et. al., 2017). To provide a balance between the need for interaction among learners, as well as the needs of new generations who were born *into* new technology, and the older generations who were born *before* new technology, the program delivery should use a blended learning approach. By combining face-to-face classroom interaction with learning technologies, using both synchronous tools (such as a virtual lecture through a video-conferencing system) and asynchronous tools (such

as a discussion forum through a learning management system), a blended learning environment provides flexibility and accessibility and ultimately increases the likelihood for meaningful learning (see Scoppio & Covell, 2016).

It is acknowledged there may be programs that could be helpful examples with regard to implementation and program options, such as, for example, a program by Correctional Services Canada as noted by one of the class action members during one of the consultations, although it was not possible to acquire tangible documentation on the program to inform this report.

Lessons learned

When looking beyond the tactical/operational levels, it seems that lessons are not always being learned by Canada's military, and this includes incidents of sexual misconduct that are reoccurring repeatedly within the CAF. Consequently, it is essential to incorporate in the new program some of the lessons learned in the context of sexual misconduct.

To ensure organizational learning, the CAF should leverage the heartbreaking stories from the representatives of the class action, and other survivors of MST, who are willing to share them in order to capture them through a commemoration video documentary. This will ensure that these stories are never forgotten and that these lessons will be remembered by the organization for years to come. A very pertinent example of a documentary film is *The Fruit Machine*[32] by filmmaker Sarah Fodey (2018) who documented "survivors of a decades-long homosexual witch-hunt recount their personal stories of dedication and betrayal at the hands of the Canadian government". The men and women survivors in the documentary include former members of the CAF, the Royal Canadian Mounted Police and other public servants, who were all targeted in Canada's four decade long gay purge.[33]

Quality assurance, continuous improvement, accountability and resources

Quality assurance activities such as program evaluation and validation should be conducted regularly to assess efficacy and effectiveness of the program, and continuous improvements to the program should be made to ensure that it remains 'evergreen'. Additionally, annual update reports on the program performance should be submitted to an external reviewer or reviewers to provide oversight, and then made publicly available to class members as well as the CAF and the Canadian public to promote accountability.

This program could be considered by some to be both bold and visionary. To be sure, to implement the kind of social change that is required in the CAF, it is important to have a forward-looking vision of what we want the organization to be in the future. Without a doubt, to execute this 'visionary' program prompt actions as well as dedicated and appropriate resources are required. Unfortunately, at times, organizations tend to implement new programs and activities using the 'resource neutral' approach. However, the new 'visionary' *IDEA* program cannot be successfully implemented with zero resources. Indeed, as Thomas Friedman once said, "a vision without resources is hallucination" (Kotkin, 2008). Ultimately, the cost of providing this kind of educational program is very minute in the big picture, when we consider the impact on the health, lived experiences and careers of individuals affected by incidents of sexual misconduct, harassment, racism, discrimination, exclusion or other harmful behaviours, as well as the numerous

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[32] The so called 'fruit machine' was the nickname given to a supposedly homosexuality detector commissioned by the Canadian government in the 1960s and designed by psychology professor Dr. Frank Robert Wake to keep LGBTQ2+ people out of the public service and the military (Pritchard, 2016).

[33] Following the 2017 Prime Minister Justin Trudeau's formal apology to gay Canadians who had been fired from their civilian jobs and the military during the Cold War, a LGBTQ2+ National Monument will be built in Ottawa to memorialize the thousands of people whose careers were ruined because of their sexual orientation (Government of Canada, Canadian Heritage, 2020).

impacts on the organization in terms of human resources, reputation, financial and potential liabilities.

Recommendations

The following recommendations are put forth with the intent that they cannot happen in isolation as they are all connected. The envisioned timelines are as follows: a communication and roll out plan regarding the new *IDEA* program should be started without delay within three months (recommendation no. 1); the new program should be developed in the immediate short-term, namely levels 1-2 within one year, and levels 3-4 within two years (recommendations no.2 to 10); program delivery should occur in the short-to-medium-term, namely within two years for levels 1-2 and within three years for levels 3-4 (recommendations no.11 to 13); and, resources and quality assurance activities should be ongoing (no.14 and 15). The final recommendation (no. 16) addresses the possibility of extending the *IDEA* program to DND civilian employees in the future, since some of them are retired military members and thus bring with them the CAF organizational culture.

1. The CAF should start without delay a communication and rollout plan regarding the new program being developed, using a multi-media approach, ranging from town-halls in military bases across Canada, to videos by CAF leadership, social-media posts and emails through the Defence Wide Area Network (DWAN).
2. The CAF needs to develop and implement a new, comprehensive and career-long Inclusion, Diversity, Equity, and Accountability (*IDEA*) educational program, mandatory for all Officers and NCMs and integrated over a member's career starting from a new recruit, through General and Flag Officers.
3. GBA+ should be used as an analytical tool in both program development and delivery to ensure that gender and intersectionality factors are always considered (Government of Canada, Status of Women Canada, 2020).
4. The new *IDEA* educational program should have a foundation in the values of inclusion, diversity, equity, and accountability, grounded in relevant legislation and policies as well as related key constructs and knowledge, including:
   - Personal bias, harassment, discrimination, racism, bystander intervention, and micro-aggressions;
   - Intersectionality;
   - Women and gender issues;
   - LGBTQ2+ issues;
   - Indigenous issues;
   - Visible minorities and people with disabilities issues;
   - Culture and organizational cultures;
   - Military culture;
   - Gender issues in defence and security contexts;
   - How to apply GBA+ at the CAF strategic, operational and tactical level;
   - How to foster an inclusive, diverse, equitable and respectful work environment; and
   - How to foster a safe space in the workplace.
5. Through the program, CAF members should further develop a variety of skills critical to work in diverse environments, including:

- Willingness to learn;
- Professionalism / ethics;
- Cultural awareness / diversity;
- Interpersonal skills / social skills;
- Self-management;
- Building and maintaining trust;
- Team building / collaboration;
- Flexibility / adaptability;
- Conflict resolution / problem solving;
- Leadership / decision making;
- Diplomacy;
- Communication verbal and written / active listening;
- Critical thinking; and,
- Imagination / creativity.

6. The new *IDEA* program should be a standalone, progressive, career long educational program and should include as a minimum four levels, corresponding to a minimum of four, or more, courses: an introductory level; a basic/foundational level; an intermediate level; and an advanced level.

7. Mandatory '*IDEA* days' should be established, that is to say, continuous learning events delivered regularly in every CAF unit by qualified professionals, to allow members to refresh their knowledge and acquire updates on legislation and policies, and engage in dynamic and meaningful discussions. Various learning checks should also be in place, ranging from questions on legislations and policies updates, to self-reflections on how to apply in practice the concepts or skills learned.

8. The program should be developed using adult education principles, including experiential learning, contextual learning, and active learning, as well as transformative learning, to ensure that the new learning is relevant and meaningful for all CAF diverse adult learners.

9. Following best practices in instructional design, the design and development should be conducted by an intergenerational and interdisciplinary team to include volunteer members of the class action; civilian experts and uniformed members with a background in diversity, gender issues, employment equity; instructional designers; multi-media and web developers.

10. A commemoration video documentary should be developed for educational purposes to be included in the program, capturing testimonies and stories from survivors of sexual misconduct including volunteer representatives from the class action.

11. Program delivery should draw on best practices for learning strategies such as blended learning, that is, a combination of face-to-face classroom interaction and learning technologies, using both synchronous and asynchronous tools, facilitated by competent instructors who have expertise in the field.

12. Successful completion of program levels and continuous learning events should be tracked for all personnel over the years to ensure that every member of the CAF is aware and accountable of the ramifications of their actions should they persist or breach any policy, code or law.

13. The new program will have both intrinsic benefits of developing CAF members and leaders with the requisite knowledge, competencies and skills in the context of inclusion, diversity, equity, and accountability, as well as tangible extrinsic benefits, such as a certificate upon completion of the program.

14. Quality assurance activities such as program evaluation and validation should be conducted regularly and continuous improvements to the program should be made to ensure it remains evergreen. Annual update reports on the program performance should be submitted to external reviewer/s to provide oversight, and then made publicly available to promote accountability.
15. Dedicated and appropriate resources must be assigned at the outset to support not only program development and delivery but also quality assurance activities and continuous improvements and updates to the program.
16. Consideration should be given to extend the *IDEA* program to DND public servants in the future.

Conclusion

This report has illustrated how the CAF has failed to achieve true gender diversity and inclusion due to systemic issues of sexual misconduct and harassment, organizational un-willingness to learn lessons from the past, combined with un-responsiveness to social change, and the faulty assumption that one-shot, one-size fits all training would resolve these systemic issues. Ultimately, it is simply not enough to just revise existing CAF 'training', which is inadequate, incoherent, and uncoordinated. To truly achieve social change in the CAF, a new 'educational' program mandatory for all members must be implemented, grounded in the values of inclusion, diversity, equity and accountability. The implementation of the new program should start immediately to avoid losing momentum, as every day that is wasted, things will not get better for the organization. The *IDEA* program will allow Canada's military to (re)build a more equitable, diverse, inclusive and accountable organization. This, in turn, will enable the CAF to attract and retain more women, LGBTQ2+ members, and other diverse groups. Through the implementation of the new *IDEA* program, we will create a new reality for Canada's military.

At the time of finalizing this report, the CAF is now facing new allegations of sexual misconduct against the past two Chiefs of the Defence Staff (Pugliese, 2021; Coletta, 2021) as well as other members of DND/CAF (Stephenson, 2021). Following these accusations, a CAF decorated female infantry officer, Lieutenant Colonel Eleanor Taylor, resigned to demonstrate her disdain for an organization she no longer wishes to be a part of (Global News, 2021; Austen, 2021). This recent crisis in the Canadian military has shaken the organization to its core and has been compared to the Somalia scandal of the 1990s in that they are "both crises of leadership and the perception of leaders" (Brewster, 2021). While it was beyond the scope of this report to engage in an extensive discussion on these allegations currently under investigation, it is important to underscore the timeliness and importance of the *IDEA* program recommendations, which were already in progress before these new accusations came to light. Notwithstanding the outcome of these allegations, it is clear that the CAF cannot 'fix itself' and that there is an even greater need for this new program, which should not be seen as a 'tick in the box' or a 'quick fix', but rather as career-long learning that will stand the test of time, and as a way to start restoring Canada's respect and trust in its military.

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Conclusion

From August 2020 to June 2021, the Consultation Group for Gender Representation and Diversity collaboratively conducted a Needs Assessment, supported the development of roadmap recommendations, and presented progress of these consultations to stakeholders across the Defence Team. The Consultation Group agreed upon three core areas of focus in support of culture change: education, leadership accountability, and workplace support. Subject Matter Experts thus created roadmap recommendations to respond to and support culture change in the Canadian Armed Forces focusing on these three areas. This Summary Report is the concluding output of the consultative process; however, the work is just beginning.

In addition to the actions proposed, the recommendation roadmaps above require internal and external accountability, dedicated and appropriate resources, ongoing research, and quality assurance. The roadmap below summarizes the key recommendations and proposed timelines. A detailed program of work and project management plan will be required by the responsible agent for implementing these recommendations.

Figure 1: Recommendation Roadmap[34]
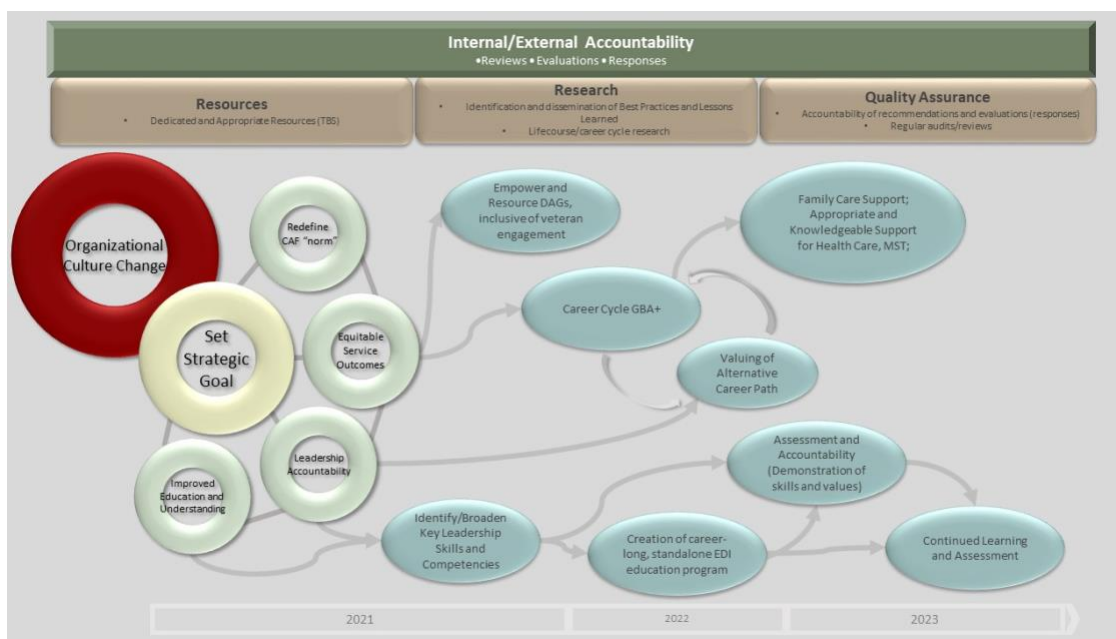
Canadian Armed Forces leadership are encouraged to consider the enclosed recommendations as a whole, as they are mutually reinforcing: the Canadian Armed Forces cannot assess leadership on competencies that have not yet been taught through a formal education program. If members are not supported through their employment and service through inclusive policies and programs, career progression will continue to be impacted.

While the enclosed recommendations were developed for the Canadian Armed Forces, as a Defence Team there are opportunities to improve the way members are educated, promoted, retained, and supported. There are organizational culture challenges present in both military and civilian teams, which require ongoing reflection and creative solutions to address. Some of these

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[34] This summary depicts recommendations at the highest level. Readers are encouraged to review the detailed recommendations in full.

recommendations, if implemented in a Defence Team approach, can improve the way all members are valued and developed.

These recommendations challenge the Canadian Armed Forces to do better, and would not be possible without the considerable time, energy, and commitment of the engaged Consultation Group members. This work is the result of three Subject Matter Experts, informed by the lived experiences of both Class members and Defence Team Representatives. Appreciation is also expressed to the Class member representatives who contributed their whole selves for this consultation process. Their ongoing work, not only in this consultation, but in their advocacy in support of members of the CAF and veterans, is admirable.

Director Litigation Oversight is now responsible for the furtherance of these recommendations to senior leadership of the Canadian Armed forces for decision and implementation. Until such time that a coordinating responsible agent is identified by senior leadership, where possible, recommendations should be reviewed and implemented within commands. The successful implementation of these recommendations require a collaborative, consolidated approach across the Defence Team and must be coordinated by a team that consists of internal and external subject matter expertise, as well as military and civilian experience. These recommendations must be properly resourced, maintained, and evaluated in an intentional, holistic, and systematic way to ensure their success.

Appendices

Appendices appear in original format.

Appendix 1 – Schedule "O": Consultations for Gender Representation and Diversity

1. This document sets out a proposed consultation schedule. Should circumstances require it, the process, schedule or representatives may be amended or changes by the agreement of the parties to address challenges and facilitate the objective of the consultation.

Consultation Group

2. The lead representatives in respect of the consultations will be:
   a) **CAF Representatives**
   Within 30 days of the FSA being approved, CAF will select 3 representatives with functional responsibility for, or subject matter experience with, gender diversity and inclusion to participate in the consultations.
   b) **Class Member Representatives**
   Within 30 days of the FSA being approved, Class council will select 3 representative plaintiffs or class members to participate in the consultations.
   c) **Subject Matter Experts**
   Within 30 days of the FSA being approved, the parties will jointly select 3 subject matter experts to participate in these consultations.

Process

3. The Consultation on Gender Representation and Diversity will proceed in 3 phases: phase I - needs assessment; phase II – development; and phase III – finalization.

4. Class Member Representatives will not be paid for their time or their advice. Canada shall be responsible for reasonable expenses incurred by the Class Member Representatives in the course of carrying out their obligations under this Schedule. Reasonable expenses may include meals, travel and accommodation in accordance with the Government of Canada National Joint Council Travel Directive. Class Member Representatives may be asked to sign an Agreement with the Department of National Defence/CAF in order to facilitate the reimbursement of these expenses, in accordance with Government of Canada policies and procedures.

5. Administrative support required for the work of the Consultation Group will be provided through Military Personnel Command.

Phase I – Needs Assessment

6. The objective of the Needs Assessment phase is to establish an informal foundation and context to understand current CAF demography and initiatives, and identify areas where the input and expertise of subject matter experts and Class Member Representatives could be best employed.

a) Within 90 days following the approval of the FSA, the Consultation Group will hold one or two formal meetings of representatives. Additional separate meetings between some or all of the Consultation Group may be held as required;

b) CAF will share information concerning current gender demography, trends and gender representation and diversity initiatives;

c) CAF will share information an overall CAF structure and processes, which may be important to improving gender representation and diversity including recruitment;

d) Subject Matter Experts will share subject matter expertise and types of program development, advice and input that can be provided;

e) Consultation Group will brainstorm on methods to develop and improve CAF gender representation and diversity;

f) Consultation Group to agree on scheduling and meeting dates for phases II and III;

g) Subject Matter Experts to provide proposals with estimates of reasonable costs of consultation work to CAF for consideration and approval;

h) CAF to arrange and establish Subject Matter Expert contracts in accordance with government contracting rules and guidelines and Consultation Group objectives.

Phase II – Development

7. The development phase involves work by Subject Matter Experts in developing, discussing and integrating feedback from the broader consultation group, in relation to ideas and advice for gender representation and diversity proposals, recommendations and initiatives.

a) Within 6 months following the approval of the FSA the Consultation Group will hold one or two formal meetings of representatives to discuss possible areas for improvement suggested by Subject Matter Experts. Further communications or meetings may be scheduled as required;

b) Subject Matter Experts to develop proposals, ideas and advice regarding the development programs or initiatives on CAF gender representation and diversity and how to integrate with current CAF structure processes and initiatives;

c) Subject Matter Experts to provide preliminary draft reports outlining proposals or recommendations to CAF and Class Member representatives for broader consideration within the Consultation Group. The representatives will have an opportunity to provide comments and suggestions to ensure the recommendations reflect Class Members' interests and concerns and take into account existing CAF programs, initiatives and constraints;

d) Consultation Group to discuss and consider appropriate and realistic gender representation goals and timelines.

Phase III – Finalization

8. In the finalization phase, Subject Matter Experts will incorporate feedback and submit final reports to the Consultation Group, and the Consultation Group will, in turn, prepare a summary report of the Subject Matter Expert proposals and Consultation Group work for delivery to CAF.

   a) Within 9 months following the approval of the FSA, Subject Matter Experts will finalize and present proposals and recommendations addressing gender representation and diversity goals, and the timelines to achieve them, to the broader Consultation Group;
   b) The Consultation Group to present Subject Matter Expert proposals to the CAF along with a summary report of the work of the consultation group.

Appendix 2 - Terms of Reference

TERMS OF REFERENCE – HEYDER-BEATTIE SCHEDULE O <u>CONSULTATION GROUP</u>

References:
 A. Heyder, Graham and Shultz-Nielsen v. Her Majesty the Queen, Beattie v. Her Majesty the Queen - Final Settlement Agreement 10 July 2019
 B. Federal Court Decision 25 November 2019
 C. Joint CDS/DM Directive for Implementation of CAF-DND Sexual Misconduct Class Action Final Settlement Agreement (DRAFT)

1. In accordance with the Final Settlement Agreement (FSA) of the Heyder-Beattie Class Action (Ref A, B), the Consultation Group, comprised of three (3) CAF representatives, three (3) mutually agreed upon Subject Matter Experts (SMEs) and three (3) Class Members will determine the overall process and outcome of the Schedule O implementation, with the end intention to develop recommendations to improve gender representation and diversity in the CAF. Leveraging the expertise of external opinions and approaches will provide the CAF with a crucial and much-needed external perspective.

2. <u>Intent</u>: The Schedule O Consultation Group is one of five (5) measures to be implemented in response to the FSA. As per S. 5.05, the Gender Representation and Diversity Consultation Group will be comprised of three DND/CAF representatives, three mutually-agreed upon SMEs and three Class Members regarding increasing gender representation and diversity in the CAF.

3. The intention of this Consultation Group is to garner external subject matter expertise, and lived experiences of current and former CAF members in order to improve gender representation and diversity, with a final recommendation report and presentation to be made to the CAF.

4. <u>Objectives</u>: The Consultation Group will be implemented in three phases, as set out in the *Heyder-Beattie* FSA. These include:

   a.   Providing an overview of current initiatives and context of the CAF to the named SMEs and Class Member Representatives;
   b.   Supporting SMEs and providing feedback in the development of their recommendations to improve gender representation and diversity in the CAF;
   c.   Composing a final Summary Report to consolidate SME recommendations and work of the Consultation Group, which will be presented to the CAF.

5. <u>Outcomes</u>: A Summary Report, comprised of the materials generated during the consultations and three SME-generated Recommendation Reports to address gender representation and diversity in the CAF is the primary outcome of this Consultation Group. These two products will be developed in the following phases:

a. Based on Phase 1 information sharing/gathering, SMEs in consultation with CAF and Class Member Representatives, will identify strengths and weaknesses within the overall CAF approach to gender representation and diversity;

b. Phase 2 and 3 will result in SMEs developing specific recommendations to the CAF regarding gender representation and diversity, with input and feedback gathered from both CAF and Class Member Representatives;

c. Phase 3 allows SMEs time to finalize their recommendation reports, and for the Summary Report for the Consultation Group work to be developed.

6. Consultation Group Summary Report: The final report will contain the recommendation reports from the three SMEs, as well as the relevant documents and summary of the Consultation Group efforts. CAF and Class Member Representatives will review and approve of the final report prior to its presentation to the CAF. During the preliminary convening of the Consultation Group, the CAF recipient of the Summary presentation will be determined.[35]

7. Scope of Schedule O: The FSA provides general guidance on the focus of the Schedule O Consultation Group to be gender representation and diversity. The Consultation Group will determine the focus and intent of the Consultation Group upon convening.

8. Additional Information and Resources: There may be limitations on data and content that can be shared by the CAF due to classification and protected status. SMEs are permitted to request information that may assist in their development of recommendations if relevant to CAF's commitment to share information. The CAF retains the sole responsibility and authority over whether information may be shared, based on relevance of the request to the mandate of the Consultation Group, and the protected status of the information.

9. Confidentiality: In order to support free and open discussion within the Consultation Group, members are asked to maintain confidentiality of the privileged discussions and deliberations that will occur throughout the Phases of Schedule O. The matters discussed during the Consultation Group are asked to be treated with discretion.

10. Requests for Information: All requests by the public for information concerning the Consultation Group will be referred to the Directorate of Access to Information and Privacy (DAIP) at NDHQ. Any releases of information shall be made in accordance with the *Privacy Act*, the *Access to Information Act*, and the *National Defence Act*.

11. Due Date: Schedule O outlines the following timelines for implementation:[36]

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[35] ED DLO is the responsible agent to identify the recipient of the recommendations enclosed.
[36] Timelines since amended due to COVID-19.

FSA	Date	Task
Approval Date + 90 days	1 January 2021	Completion of 1-2 initial Gender Rep meetings
Approval Date + 6 months	1 April 2021	Completion of 1-2 "development phase" Gender Rep meetings
Approval Date + 9 months	1 July 2021	SMEs to present proposals for Gender Rep consultations

12. Reporting Progress: As the CAF lead, DHRD will provide updates to relevant leadership and the Departmental Litigation Oversight Committee on a regular basis.

13. Communication: Clear and regular communication is necessary for Schedule O to be a success. An email list that consists of all members will be developed following confirmation of contracting for SMEs.

14. It is expected that all conversations and communications relevant to the SMEs developing their Reports will be shared during the Consultation Meetings, or in group emails. In the event further conversation or questions are required, Consultation Group members are asked to copy all participants to ensure clear lines of communication and everyone is informed, as well as tracking work and meetings for the Summary Report.

15. Financial: Financial matters will be dealt with as follows:

   a. Travel for members of the Consultation Group will be paid for by CAF. Reasonable economical means of travel and living arrangements are to be used.[37]

   b. As per Schedule O, Class member representatives will not be paid for their time or service, however reasonable expenses for the purpose of contributing to the Consultation Group will be reimbursed as per S. 20.

   c. Reimbursement Process: Travel and hospitality will be coordinated and paid for by CAF;
      1) Contractors will submit travel as part of their invoicing process.
      2) Volunteers are asked to maintain all additional receipts, boarding passes, and materials and to submit within two (2) weeks (14 days) of the meeting date.

   d. Expenses incurred, or commitments made, without prior approval will be the responsibility of the individual incurring the expense, or making the commitment, using their own financial support arrangements;

   e. All expenses and per diems are subject to Government of Canada National Joint Council Travel Directive Guidelines; and

   f. Point of Contact (POC). The POC for issues related to the financial support for the Consultation Group is _____.

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[37] As per the Government of Canada National Joint Council Travel Directive Guidelines.

16. <u>Dispute Resolution</u>: In the event that a dispute arises, the Consultation Group will attempt resolve it internally. In the event that disputes cannot be resolved within the Consultation Group, the Consultation Group may consult counsel for both the class and the Attorney General of Canada.

Endorsement

Appendix 3 - Summary of Needs Assessment

(8 October 2020)

Education	Leadership and accountability	Policy and programming	Representation and acknowledgement	Career management/retention	Release	Subject Matter Expertise
- Review of professional development stages for diversity, inclusion and conduct, including (but not limited to) sharing of stories and testimonies from survivors - Incentivized training and development for diversity and inclusion and professional conduct that are delivered by professionals/Subject Matter Experts	- Leadership qualities/PERS should include empathy, character-based assessments, empathy, respect, inclusion - Peer reviews (PERs) - Understanding climate on bases and wings - Research program that assesses impact of heteronormative and homosocial culture on sexual misconduct and harassment - Alignment of databases internal to CAF and with VAC - Moving beyond performative acts - Improved understanding an awareness of COs - Military justice system external review (external JAG)	- Leadership knowledge of policy and appropriate application, including medical direction and leadership compliance - Support services receive trauma-informed training in order to provide treatment/support - Inclusive health services (IVF, MST as an OSI) - Best practices and lessons learned from other countries - Dedicated point of contacts on bases/units for victim advocacy (support, direction, etc) (SAPR approach) - Point of contact for personnel policies (ARC) - Review of policies related to parental leave, mental health, pregnancy since 2010 - Duty to warn	- Commemoration or video that can be used for education purposes - Sharing of testimony/stories - Updating of oath, ethics and values form for new recruits - Pre-recruitment screening questions on values, ethics, biases during interview stages - GPA Plus integrated into (and assessment of) basic training	- Support for individuals once they join - Promotion and merit board composition - Adaptive career path (including maternity leave) - Deployability - Universality of Service - Career management (training, postings) - Incentivizing positions for diversity and inclusion professional development - Additional positions (uniformed psychologists) - Diversity within SMSRC positions, military/civilian breakdown - Knowledge of supports (sexual misconduct, policy clarity) - Alignment between career managers and medical teams - Bounce back period/operational tempo too high; exacerbating PTSD	- Duty to report - Disclosure of medical when applying for OHIP (privacy)	• Leadership • Policy change, development and evaluation • Military education • Military and organizational culture • Gender integration • Military to civilian transition • Military sexual trauma • Military doctrine and values • Critical mass
Hypermasculinity (masculinities, contest culture, and impact on various communities, subcultures (across L1s and subgroups).						