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# REVIEW OF QUALITY OF LIFE PROJECT MANAGEMENT

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## SYNOPSIS

*This report presents the results of a review of management processes to ensure timely attention to matters affecting the quality of life of Canadian Forces (CF) members and their families.*

*The mid-1990s were difficult times for DND and the CF. There were serious morale issues as well as diminished public confidence in the institution. To begin to address morale concerns, the Minister of National Defence asked the Standing Committee on National Defence and Veterans Affairs (SCONDVA) to look into the situation and to recommend remedies where appropriate.*

*The Standing Committee conducted a series of interviews and town-hall style meetings across Canada and in bases in Europe. Their report was tabled in October 1998 – Moving Forward: A Strategic Plan for Quality of Life Improvements in the Canadian Forces. While SCONDVA was gathering data and preparing their report, DND and the CF began to formulate a response and to put vehicles in place to address issues. A key vehicle was the establishment of the Quality of Life (QOL) Project. While tasked with coordinating all related issues, the Project's main concentration was on the 89 recommendations contained in the SCONDVA report.*

*A number of the initiatives to be undertaken required significant time and resources, if not fundamental policy changes and cultural shifts. As a consequence, not all could be completed before the scheduled closure of the Project in August 2001. Timely plans were, however, put in place to provide for continuity beyond the active life of the Project. The Directorate of Quality of Life (DQOL) was stood up upon the termination of the Project and has carried on with the work, including ongoing work on the SCONDVA initiatives.*

*This review looked at: the background of work on QOL issues by the Project and by DQOL; the nature of the quality of life model developed to help address the issues; the organization of the Project and the subsequent Directorate; and the management of efforts in support of their mandates. Detailed assessment of the current quality of life of CF members is a highly complex and resource intensive activity, beyond the scope of this review and not addressed (other than anecdotally) in this report. Both the Project staff and DQOL have undertaken to conduct direct measurement through the administration of a QOL Survey. To date, one such survey has been issued and analyzed so as to permit a baseline against which progress can be gauged.*

*Notwithstanding the complexities of performance measurement, anecdotal evidence obtained through interviews, focus groups and analysis of proxy data, suggests that CF members and their families are more satisfied with their quality of life now than was the case just a few years ago. Some of the initiatives that came out of the SCONDVA report remain incomplete, although this is not for lack of effort or support from either the CF or the Department. Work is progressing to address areas of concern/dissatisfaction that remain from the mid-1990s, especially housing and housing policy.*



*The management of initiatives related to quality of life has matured since the early days of the original Project. Initially, work was concentrated on remedies addressing specific issues and problems. It has now begun to take the longer view, looking more to outcomes and to proactively anticipating emerging problems. This will be enhanced through the application of management tools recommended by this review – for example, results-based management framework(s) and improved performance measurement.*

*Another reflection of the maturation of the DND/CF approach to quality of life is the recognition of the emerging importance of quality of work life. Interviews and focus groups conducted during the course of this review provided indicators that issues surrounding workload and working conditions may well have replaced social contract issues as the major source of member and family concern/dissatisfaction. DQOL is addressing some of the issues raised, such as operational and personnel tempo (OPTEMPO and PERSTEMPO). However, a number of matters are beyond the recognized purview of DQOL – non-availability of training courses or the perception of unequal treatment by members of the Reserve Force for example – but are viewed by CF members as being part of their quality of work life, and, therefore, part of their total quality of life.*

*Key recommendations of this review call for the following actions:*

- 1. Develop a strategic plan to guide QOL initiatives and to ensure that they appropriately reflect current and emerging QOL needs to maintain the CF as an employer of choice;*
- 2. For each major new initiative in support of the overall QOL strategy, develop a results-based management and accountability framework;*
- 3. Formulate a QOL monitoring system to make use of existing data sources and to provide early warning of emerging issues/problems/opportunities; and*
- 4. Ensure more effective design of communication strategies respecting QOL issues, remedies and initiatives.*



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## RESULTS IN BRIEF

### BACKGROUND

The Department of National Defence established the Quality of Life (QOL) Project in 1998 to address issues that had come to significantly impact the morale of the Canadian Forces. Problems were widely reported in the press and acknowledged by the Department and CF. One of the main tasks of the Project was to address 89 recommendations made in a study by the Standing Committee on National Defence and Veterans Affairs (SCONDVA) in response to a request by the Minister of National Defence.

The QOL Project was the first human resources driven project in the Department to use the practices and procedures associated with traditional crown acquisition projects. The Assistant Deputy Minister, Human Resources (Military) (ADM(HR-Mil)) was named the Project Leader. The Senior Review Board (SRB) was comprised of a number of the Departmental and Canadian Forces Level 1 Advisors and co-chaired by the Deputy Minister (DM) and Chief of Defence Staff (CDS). The project team assembled a number of initiatives by combining the recommendations of SCONDVA and work coming out of an internal DND/CF team working QOL issues. These initiatives formed the core of the work tasked to the Project. The rest of their mandate was in coordinating and monitoring the other QOL-related work that was taking place. The Army, Navy and Air Force each had their own QOL-related work addressing issues unique to their respective environments.

Despite widespread use of the term “quality of life”, there is no universal definition. One of the critical first steps taken was in developing a working concept of quality of life and a model of how it would be understood to affect CF members and their families. The Director of Human Resources Research and Evaluation (DHRRE) undertook the specialized research work for the Project Office. The researchers reviewed up-to-date work in the area and based a significant portion of their recommendations on studies that had very recently been done for the United States Navy. The model developed made use of the concept that members could perceive an overall quality of life, called global QOL in the model, and that global QOL is comprised of how members feel about specific, essentially equally weighted areas that the researchers called QOL domains. The five domains are how members perceive:

- their satisfaction with the state of their health;
- their satisfaction with their family and social life;
- their satisfaction with their residence, neighbourhood and general living environment;
- their satisfaction with how they spend their leisure time and how they see their personal development; and
- their satisfaction with their work environment and their professional development.



The model acknowledges that there are many factors that make up a member's quality of life: those, over which the CF has direct control, such as work environment; others, over which the CF has some control such as health, leisure time or, for those in Married or Single Quarters, housing; and, those over which the CF has little or no control, such as the housing situation for that 70 per cent of CF members living off base as well as aspects of family and social life of all members. Some form of measurement of quality of life was seen as a clearly important management activity. By way of taking those measurements, DHRRE produced, administered and analyzed the Quality of Life Survey for both members and spouses. The survey was intended: to draw a quality of life baseline against which future improvements (or declines) could be measured; to gather data on whether or not members and their families were aware of and understood the various initiatives underway; and to validate the five-domain model of quality of life. Although the rate of survey returns was not as high as was hoped, there were sufficient returns for assessments with acceptable levels of confidence in the accuracy of the data. In addition to the survey work, ongoing measurement and direct communication with members and their families was managed through the adoption of an on-line Quality of Life Information Form.

The Project was planned from the beginning to have a fixed duration. On 31 August 2001, the Quality of Life Project was terminated and on the next day, the Directorate of Quality of Life (DQOL) was stood up. The new organization was organized slightly differently, but with a view to sustaining itself over a longer period of time. While the Project was concentrating on the completion of the initiatives coming out of the SCONDVA recommendations, DQOL understood that its focus would be more on policy development.

The review covered by this report looked at both the Quality of Life Project and the Directorate of Quality of Life. The review team used traditional data gathering methods. Over 110 interviews were conducted in NDHQ and in the field with senior commissioned and non-commissioned leadership. The team spoke with a number of medical professionals, social workers and Canadian Forces clergy. In part to see how well the project was communicating with the membership of the CF, the review team conducted a number of focus groups in the Headquarters and with members of the Army, Navy and Air Force. The scope of the review was limited to the efforts of the project office and DQOL. Work done on quality of life by the three CF environments was looked at only in light of the mandate of the Project to coordinate environmental efforts. Actual measurement of quality of life is a significant undertaking and was well beyond the resources of the Chief of Review Services and the scope of this review. In addition to forming an overall view of management activities, the review looked at four main areas for each of the two organizations:

- mandate achievement;
- management framework;
- performance measurement; and
- communications.





## OVERALL ASSESSMENT

It is difficult to directly assess the success of the Quality of Life Project and the Directorate of Quality of Life without the data that will be available from the next and subsequent versions of the Quality of Life Survey. Nevertheless, anecdotal evidence obtained through interviews, focus groups and analysis of proxy data, suggests that members and their families are more satisfied with their quality of life now than was the case even a few years ago. While some of the initiatives that came out of the SCONDVA report remain incomplete, it is not for lack of effort or support from either the CF or Department. Open initiatives were recognized from the beginning as requiring extensive staff effort as they involved significant research, major policy change or even cultural shifts. Work is progressing to address the areas of concern/dissatisfaction that remain from the mid-1990s, especially housing and housing policy (CRS has performed other work on housing issues – the reports can be found on the CRS Internet Site).

The management of quality of life efforts has matured since the early days of the Project. Initially, work was concentrated on specific outputs and mid-level outcomes that addressed specific issues. This was likely the best approach at the time, facilitating quick, focused action. However, it was not necessarily the optimal approach to achieving sustained efforts to ensure that members perceived that Canada and the CF were fulfilling the social contract. For example, a one-time 10 per cent pay raise achieved today will cause a spike in member overall satisfaction but is unlikely to address any future inequities. A policy of frequent review and small adjustment that maintains compensation levels over time with respect to a recognized index or against an accepted reference group is more likely to be seen as fair. As the management of issues has matured, it has begun to take the longer view and has looked more to outcomes that will sustain ongoing efforts to preclude the sorts of problems the CF encountered in the mid-1990s. That work would be enhanced through the application of management tools such as more rigorous performance measurement and through the development of results based management and accountability frameworks.

A reflection of the maturation process is the increasing emphasis on one particular aspect of quality of life – quality of work life – as work supporting the social contract progresses. Again, anecdotally, discussions and focus groups provide indications that issues pertaining to quality of work life (e.g., workload and working conditions) have become the major source of member and family concern/dissatisfaction. DQOL is addressing some of the issues raised to the review team, such as OPTEMPO and PERSTEMPO, but a number of matters concerning the quality of work life are well beyond the purview of DQOL – these matters are, however, viewed by CF members as being part of QOL. Gains made through concerted efforts and hard work can be quickly negated by untimely resolution of redress of grievances (i.e., may take two years), by incorrect denial of a travel claim, by perceptions of unreasonable delays in awarding a medal, or even by failing to properly explain a policy that impacts a member or member's family.



## MANDATE ACHIEVEMENT

With respect to mandate achievement, the Project staff and the Project Senior Review Board understood that completion of all SCONDVA recommendations was unlikely before formal Project termination. A number of the more difficult initiatives were carried over to DQOL where some of them are still being staffed. Understanding that work remains on the SCONDVA initiatives, the review team concluded that the QOL Project office achieved its mandate and that DQOL is adequately structured and managed in support of achieving its mandate. The review suggests that the efforts of DQOL would be made easier with the formulation of a strategic plan for quality of life related work that includes a more specific and operational vision than “act as a focal point for and contribute to improvements in the quality of life of CF members and their families”.

## MANAGEMENT FRAMEWORK

With respect to the management frameworks of both organizations, they operate in slightly different contexts. The Quality of Life Project had the advantage of oversight and direct participation by a Senior Review Board co-chaired by the CDS and the DM and comprising many of the most senior CF and departmental leadership. The Directorate is structured as an ongoing staff agency and managed as any other matrix organization. Both, however, share a dependence on the NDHQ matrix staffs for expertise and support in specific areas – both needed the Director General Compensation and Benefits for work on compensation issues, for example. The Directorate would have their work with the matrix eased by the development of a management framework that specifies the expected outcomes of the initiative being developed, the outputs being produced to lead to the outcome, how success is to be measured, and by producing a logic model tying all the elements of the plan together. The report recommends that a results-based management framework, formally agreed to by all relevant agencies, would help joint QOL efforts to be as efficient and productive as possible.

## PERFORMANCE MEASUREMENT

Performance measurement is often difficult, but no less critical, for *soft* projects such as quality of life. In QOL there are two areas that management must focus on. The first is the success of the specific management efforts in support of initiative accomplishment. A well-planned and carried out results-based management framework, as described above, will significantly assist in that requirement. The second area of specific concern is in the monitoring and measuring, where possible, of the global quality of life of the members and their families. If the CF is to become/remain an employer of choice and maintain effective policies and procedures in that regard, it must have a system that provides for monitoring of how members and their families can best be supported as well as determining how that support is viewed by target recipients. While the Quality of Life Survey can provide data as can, to a lesser extent, the Quality of Life Information Forms, those tools may not be able to provide sufficient early warning of problems so that they can be





quickly and efficiently addressed. Both the CF and Department conduct human resource related research and maintain data in a number of areas related to quality of life. The review suggests that it may be possible to create, using existing data, an early warning system that can operate between successive, periodic Quality of Life Surveys.

## COMMUNICATIONS

Lastly the review looked at communications. Both the Project Office and DQOL understood the importance of communications. Work defining and creating the best QOL initiative is wasted effort if the members are unaware that the initiative exists and do not access it. One problem affecting both the Project and DQOL is the degree to which communication is outside the influence of the respective staffs and in the hands of the units themselves or even in the hands of those distributing media such as the Maple Leaf. Clearly DQOL is in no better a position to communicate directly with every CF member than was the Project staff. DQOL has a communications strategy, as had the Project. The communications strategy could be enhanced by reflecting known communications difficulties and gaps and by attempting to measure and manage the performance of the entire system through frequent contact with members to see if the message is getting through. Consultation with ADM(PA) and review of the CRS Study of Internal Communications in the DND/CF<sup>1</sup> may be beneficial.

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<sup>1</sup> The CRS Study of Internal Communications in the DND/CF may be found at [http://www.forces.gc.ca/crs/pdfs/comrep\\_e.pdf](http://www.forces.gc.ca/crs/pdfs/comrep_e.pdf).



## INTRODUCTION

### BACKGROUND

“...the Canadian Forces, as you know, have been through some difficult times of late. There's no use pretending otherwise. We're all aware of some of the issues we have had to deal with and we know the damaging effects all of this has had on both the public image and the private morale of the members of the forces.”<sup>2</sup> (1997)

There is little question that the mid-1990's was a time of low morale for the members of the Canadian Forces. A period of governmental fiscal restraint, affecting virtually all departments generally and coinciding with the end of the Cold War, ushered in change for Defence specifically. The Canadian Forces and the Department of National Defence were both dramatically reduced in size. Many reductions were made through voluntary attrition. They were also accomplished through the application of previously seldom-used controls, resulting in increased releases for medical reasons and course failures rather than retention with course repeats or occupation remusters. A complete career in the CF was no longer something that could be taken for granted. Downsizing and re-engineering, especially in an effort to reduce the number of headquarters, resulted in reduced opportunity for advancement as staff positions were eliminated. Although manpower was being reduced, with new operations in Haiti and Bosnia, deployments were not cut back proportionately and Forces members were finding themselves away from home more often. Between the imposition of the pay freeze in 1991 and the first adjustment when the freeze was lifted in 1996, the Treasury Board Secretariat acknowledged that the pay of Non-Commissioned Members (NCMs) had fallen 6.7 per cent behind that of the equivalent public service member and that officer pay had fallen 14.7 per cent behind. The atmosphere of governmental restraint meant that members knew that, following years of steady losses in earning power; a return to full comparability would be years away for those who remained employed. For some of those released, pensions might never recover. The combination of scarce resources and increased tempo of operations meant that resources had to be primarily directed at mission accomplishment rather than at softer needs such as maintenance of Permanent Married Quarters (PMQs) or other amenities on CF bases. In addition to difficult personal circumstances for some, events resulting in the disbanding of the Airborne Regiment and in the convening of the Somalia Enquiry contributed to many in the CF questioning both their leadership and public support.

Although there are no recorded indications of reduced combat capability as a result of lowered morale during the period, the correlation between levels of morale over time and combat effectiveness is well known. Another well-known correlation is that between an organization's morale and its ability to retain people – in the case of the CF, people in which the organization has invested

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<sup>2</sup> The Hon. Art Eggleton, Minister of National Defence, in his address to the Standing Committee on National Defence and Veterans' Affairs, October 27, 1997.



both time and money to train and grow technically and in leadership functions. Thus, the CF was facing a potentially significant loss in capability if morale problems were allowed to continue and significant expense in recruiting and training new members, assuming that replacements could be induced to join an organization in which some members were reported, in more than one newspaper and nightly news program, to need social assistance.

As one step in restoring both morale and public confidence in the CF, the Minister of National Defence wrote the Standing Committee on National Defence and Veterans' Affairs (SCONDVA) on 8 October 1997, asking them to continue work begun just before the general election of that year in a study of quality of life in the CF. While the previous work had focused on CF members, the Minister now asked that SCONDVA look at both the members and their families. The Committee held hearings between October 1997 and June 1998 at bases in Canada as well as at Canadian bases in Germany and Bosnia. Over 6,000 attended and hundreds provided testimony. Public meetings heard testimony from individuals and those representing a wide variety of interested groups, such as chambers of commerce, defence unions and defence associations. Testimony at CF bases was heard both in public fora and in more private meetings and briefings. The problems were seen as significant enough that the Chief of the Defence Staff encouraged all members, for the first time in the history of the organization, to address their concerns in public and without fear of recrimination.

In November of 1997, the CDS directed the formation of the QOL Secretariat. The Secretariat had three roles:

- to act as the voice of the Environmental Commands and NDHQ in the formation and coordination, within Defence, of quality of life initiatives while SCONDVA was deliberating on the subject;
- to act as the point of contact between the Department and SCONDVA; and
- to prepare the structure of the Project Management Office that was to deal with the internal initiatives and the SCONDVA recommendations.

Secretariat preparations for the Quality of Life Project Management Office (PMO) became sufficiently advanced that the Project was stood-up in May 1998 with a draft charter and a Senior Review Board (SRB). The SRB approved the charter in principle on 27 June. With project stand-up, the Secretariat personnel remaining were folded into the PMO. The initial work of the PMO was concentrated on project structure and finances, project-supporting documentation, and gap analyses on emerging QOL issues.

At about the same time as the project formally stood-up another group was formed by the CDS. The Quality of Life Tiger Team was established to help, among other things, prepare a road map for the Project by suggesting prioritized initiatives for SRB consideration and to help the CDS prepare for his final presentation to SCONDVA on 4 June 1998. With representatives of the three Environments, the Vice Chief of the Defence Staff (VCDS), Deputy Chief of the Defence Staff (DCDS), and other Group Principals, the Tiger Team looked at publicly available SCONDVA records, material provided by the Secretariat and QOL SRB, and interviewed subject matter



experts. On Tiger Team recommendation, the Defence Management Committee (DMC) approved an initial \$600K for initiative development activities and \$5M for immediate emergency health and safety repairs to PMQs. Also on Tiger Team recommendation, the VCDS allocated \$1.2M to set up the PMO and to begin development activities.

## THE SCONDVA REPORT

In October 1998, SCONDVA tabled its report, *Moving Forward: A Strategic Plan for Quality of Life Improvements in the Canadian Forces*. The 89 recommendations it contained were distilled from its research and the briefings, expert testimony and public input received. In its report, SCONDVA said it had received suggestions to make explicit the unwritten social contract between the military and, through the government, the people of Canada. While SCONDVA found it difficult to frame such a contract, it did conclude that there was a national, moral commitment that should be based on five concrete principles:

- that the members of the CF be fairly and equitably compensated for their service and skills and that the compensation take into account the unique nature of military service;
- that all members and their families be provided with ready access to suitable, affordable accommodation conforming to modern standards and reasonable expectations;
- that members and their families be provided with access to support services, in both official languages, that will ensure their financial, physical and spiritual well being;
- that suitable recognition, care and compensation be provided to veterans and to those injured in the service of Canada; and
- that members be assured reasonable career progression that their service be treated with dignity and respect and that they be provided with the appropriate kit and equipment commensurate with their tasking.

The Ministers of National Defence and Veterans Affairs (as a number of the recommendations dealt with veterans) jointly tabled the Government response on 25 March 1999. The response document listed those suggestions fully supported, those supported in principle, those requiring further study and the few that could not be supported. The response included specific activities already underway, specific activities planned and studies the Government planned to undertake to address either a specific problem or an underlying cause. The Government acknowledged that a number of SCONDVA's recommendations, while supported, would require significant resources, time, and, in the case of the Canadian Forces Housing Agency, potential significant restructuring. The report specified that the Government would provide an interim progress report within one year, and a comprehensive progress report within two years.



## THE QUALITY OF LIFE PROJECT

Quality of Life is reported to be the first project in Defence that applied a traditional equipment acquisition project framework, style and techniques to a Human Resources area. The aim of the project was:

“...to implement and communicate recommendations derived from the final Standing Committee on National Defence and Veterans Affairs report, to assist the Environmental Commands and other DND agencies in the implementation of ongoing and new QOL related initiatives and to coordinate, monitor and consolidate all QOL initiatives that were, are being or will be implemented throughout the Canadian Forces.”<sup>3</sup>

As mentioned above, the overall structure was assembled in the early days of the Project. The Project was regarded as one of the highest priorities in Defence at the time. In addition to the need to internally address, and be seen to be addressing, pressing QOL issues affecting the CF, there was a practical requirement to meet some very tight time requirements for making detailed financial submissions to the Treasury Board for those initiatives requiring outside resources. Indeed, for some initiatives, costing data was required before a detailed options analysis could be completed. The importance placed upon the work to improve QOL was illustrated by the fact that SCONDVA took the unusual step of working on their report throughout the summer recess of Parliament so as to have it ready for tabling in the Fall. Within Defence, the importance of the effort was reflected in the assignment of the Assistant Deputy Minister, Human Resources (Military) (ADM(HR-Mil)) as Project Leader and in the composition of the Project Senior Review Board (SRB), co-chaired by the Chief of the Defence Staff (CDS) and by the Deputy Minister (DM) with normal membership equivalent to that of Armed Forces Council. Key to completion of building the program structure within time constraints was the work done in parallel by the QOL Secretariat and the Tiger Team on the actual initiatives while the Project team was preparing the various documents needed to support formal approval of project aim, objectives, measurement strategy, gap analysis, risk analysis, work breakdown structure, financial strategy and governance. Throughout the initial work within Defence, the work of SCONDVA was being closely followed so that action could start as soon as possible following the tabling of SCONDVA's report. Many of the more than 100 challenges identified by the Tiger Team were also SCONDVA recommendations, and the eventual structure of the Project office closely followed the five principles articulated by SCONDVA in what it termed the country's national and moral commitment.

<sup>3</sup> Quality of Life Project Charter, Version 1.0 June 23, 1998.



The Project Management Office organized itself into what it termed five themes, or pillars:

- Compensation and Benefits;
- Accommodation (for Service Members and their Families);
- Care of Injured Personnel, Veterans, and Retirees;
- Family Support; and
- Transitions (issues related to work life such as postings, messes, etc.).

Once the SCONDVA report had been tabled, its recommendations were combined with the challenges identified by the Tiger Team and specific QOL initiatives were crafted. In some cases, an initiative was designed that included a number of recommendations. The initiative that resulted in the establishment of Director Casualty Support and Administration (DCSA), for example, came out of four separate SCONDVA recommendations. Each initiative was assigned to a team overseeing a particular pillar for initiative definition if required, staffing through the NDHQ matrix and for tracking progress. Matrix participation in the drafting and resolution of initiatives was significant. Work on initiatives involving compensation and benefits, career management, or personnel postings required the knowledge and resources of the specialists in the matrix. For other areas – housing policy or personnel tempo (PERSTEMPO) for example – work was concentrated in the Project Management Office (PMO). In accordance with its mandate, though, the PMO was responsible for the coordination, consolidation and monitoring of initiatives whether or not the primary staffing efforts were assigned to elements of the matrix or were maintained in the PMO. New initiatives, those established following the tabling of the SCONDVA report or the disbanding of the Tiger Team, came from a number of sources. Some initiatives were begun because the staff in the PMO analyzed both SCONDVA and Tiger Team recommendations and found that underlying policies and procedures needed to be changed before the recommendation itself was actioned. Many of the housing recommendations, for example, could not be addressed until an overall housing policy could be approved, and many of the initiatives affecting members' families required a better understanding of the meaning of family in a society becoming ever more multi-cultural. Initiatives were also generated from within the staffs of the Environmental Chiefs and tracked, coordinated, or assumed by the PMO in accordance with its mandate. The Army had a "Quality of Life" project and the Navy had "Naval Quality of Life". The Air Force quality of life work, termed, "Flight Plan for Life", proposed 89 issues to the PMO of which 72 were accepted and either combined with other initiatives derived from SCONDVA or the Tiger Team, or formed the core of stand-alone initiatives undertaken by the PMO. The Senior Review Board also brought initiatives to the PMO. In its initial work, the PMO developed a system of analyzing and prioritizing each initiative, monitoring its progress and reporting status in monthly and annual reports. A summary of annual reports is available on the Internet and on the Defence Information Network.<sup>4</sup>

<sup>4</sup> See [http://www.forces.gc.ca/hr/scondva/engraph/final\\_2002\\_e.asp](http://www.forces.gc.ca/hr/scondva/engraph/final_2002_e.asp); for the DIN see [http://hr.dwan.dnd.ca/scondva/engraph/final\\_2002\\_e.asp](http://hr.dwan.dnd.ca/scondva/engraph/final_2002_e.asp).





## QUALITY OF LIFE – DEFINITION AND MEASUREMENT

One of the first problems encountered by the PMO was in arriving at a useful definition of quality of life. Clearly, if quality of life is to be monitored and affected, it is crucial to understand what it is and to devise some scheme of assessing it. The concept of quality of life has been around for a number of years. The term came into general use in medicine in the 1960s, especially in relation to attempts to moderate the effects of chronic illnesses or to improve life conditions for those diagnosed as terminal. The appeal of the concept led to its use in psychology and social science in the 1970s and later to discussions and research, often under the concept of “quality of work life” in industrial and organizational psychology. Despite widespread use of the term, there is no universal definition.

Notwithstanding the lack of universal definition, researchers generally agree that there are basic components that should be included in a definition and that might be reliably measured.<sup>5</sup> The first area of agreement is that the definition should allow for both objective and subjective elements. Objective elements are those directly observable and which could be measured in a systematic manner such as rent or distance from home to work. Equally important, though harder to quantify, are the subjective elements such as how a person sees his or her well-being or state of health. One other area that is generally accepted as important is the measurement of how an individual “feels” about particular aspects of their life (called the affective dimension), and what a person thinks about the degree to which the person’s life compares to what he/she wants it to be (the cognitive dimension). Researchers also generally agree that a measurement of how a person sees his or her total quality of life, sometimes called global QOL, might permit some degree of comparison from one individual or group to another. Further, quantifying individual aspects of quality of life might permit measurement of improvement in areas that can be influenced, while acknowledging the contribution to global QOL of those areas that cannot be directly influenced. There can be no doubt, for example, that acknowledging and measuring a member’s feeling towards his or her spouse is as important as feelings about salary, as both constitute a significant component of the member’s quality of life, even though the CF has control over one and little or no control over the other. A properly crafted system of measuring both global QOL and the areas or domains that make up QOL would, in theory, allow for measurements of improvement as well as point to potential problem areas and assist in development of specific interventions. Measurement of domains also assists in the measurement of sub-elements or specialized areas of quality of life such as quality of work life.

Following research into the field, a Director Human Resources Research and Evaluation (DHRRE) study recommended basing work in the CF on work done in 1995 by E.W. Kerce for the United States Marine Corps.<sup>6</sup> While Kerce’s work was not seen as being totally applicable to the needs of the PMO, it did include all of the elements discussed above and had the added benefit of being built for the study of a military organization.

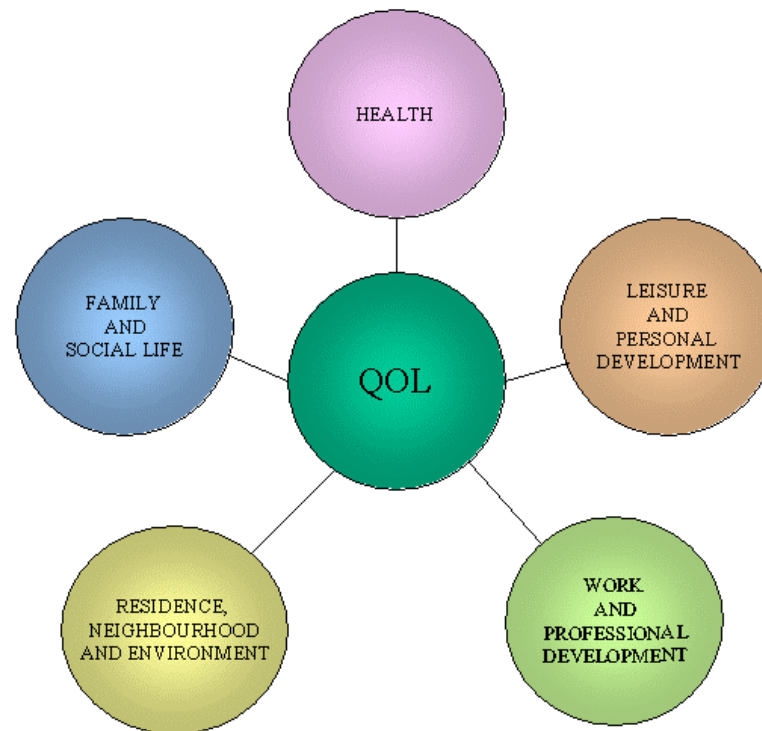
<sup>5</sup> For a discussion on the elements of quality of life and how they might be measured, see “Quality of Life in the Canadian Forces: Conceptualization and Measurement of the QOL Construct” by Dowden and Villeneuve, DHRRE Research Report 00-05, May 2000.

<sup>6</sup> See Kerce, E.W. (1995). Quality of Life in the U.S. Marine Corps (NPDRDC TR-95-4). San Diego: Navy Personnel Research and Development Center.



The definition of quality of life adopted by the CF is:

**Quality of life** is the degree to which life conditions are agreeable to CF members and their families. Quality of life can be described as being made up of 5 domains:



There is most likely a strong correlation between the perceptions by CF members (and indeed the general population of Canada) of quality of life in the CF and positive outcomes in organizational issues such as recruiting, retention, increased job performance and personal readiness. Attempts to measure and monitor satisfaction in the CF (or other western military organizations) however, had not been widely undertaken previously, aside from sporadic attempts through a questionnaire given to those being processed for release.



The survey tool designed by DHRRE had specific functions. It was built to answer the PMO's question about global QOL of CF members; to demonstrate which life domains were important to members; and to help with the definition of initiatives that should lead to improvements in members' QOL, thereby improving retention and the image of the CF as an "employer of choice". The data coming from the questionnaire was to serve as an indication of current QOL problems, the effectiveness of PMO communication efforts and as a baseline against which progress could be measured through the initiatives. Although the five domains targeted in the questionnaire appear similar to the five pillars in the PMO, they are not the same. The questionnaire authors found it impossible to directly align the pillars and life domains. The Care of the Injured pillar, for example, could not be described in terms of a life domain despite its importance to members. Likewise, the Compensations and Benefits pillar was both too wide for categorization as a life domain and too objective for subjective assessment. For example, answers to a question of "How do you feel about your last pay raise?" might be informative but not useful.

In February 2001, DHRRE distributed approximately 12,000 QOL surveys to CF members and approximately 7,000 copies of a separate survey to the spouses of CF members. The members' surveys contained 169 questions and the spouses' survey 100 questions. Although response rates were not exceptionally high, they were deemed sufficient for study purposes with a margin of error rate of 7.5 per cent for the members' questionnaire and 2.3 per cent for the spouses'. Analysis of the data received enabled the production of six reports, two (one for the members and one for the spouses) on overall quality of life, two on reaction to specific initiatives and two on reactions to the QOL model and questionnaire itself. In their report of the analysis of the questionnaires, the authors expressed their satisfaction that a set of data produced by the survey was useful as a baseline and, in response to questions about the model, that it fit the situation and allowed for the testing of relationships and interactions between elements of the QOL domains.

In addition to the survey, there was one other data collection effort conducted by the PMO. From early in the program, CF members and spouses were encouraged to fill out an on-line Quality of Life Information Forms (QoLIFs). The QoLIFs were designed for members and spouses to highlight problems, recommend solutions and ask questions about specific initiatives or QOL in general. A small subset of the PMO staff was given the primary responsibility of analysing data gathered on QoLIFs, referring questions or actions to offices within the matrix and tracking follow-up activity.



## THE QUALITY OF LIFE DIRECTORATE

In that the importance of maintaining an ongoing watch on CF quality of life was well understood, the need to rationalize efforts outside of a fixed-duration project framework was also built into the PMO from the beginning. The Project Charter divided the life of the PMO into three phases. Phase 1 was to focus on development of the Project itself and last from May 1998 to October 1998. Phase 2 was to span November 1998 to March 1999 and to focus primarily on internally funded or no cost initiatives while preparing for Cabinet submissions for externally funded initiatives and preparing the response to SCONDVA. Phase 3 was designed to last from April 1999 to August 2001 and to concentrate on finishing internally funded initiatives, begin externally funded initiatives and begin a system of developing and executing an ongoing QOL support mechanism.

With the publishing of the PMO Quality of Life Project Completion Report on 31 August 2001, the PMO formally closed and the Directorate of Quality of Life (DQOL) was established, reporting to the Chief of Staff, ADM(HR-Mil). In addition to the specific task of continuing with the work on the not yet completed SCONDVA initiatives, DQOL had the mission:

...to act as a focal point for and contribute to improvements in the quality of life of CF members and their families.

Following the closure of the PMO, DQOL was planned to comprise four sections – initiatives, accommodation, monitoring, and administration. There were twelve positions planned, eight military and four civilian. During this period, the review team heard widespread concern from both staff and ordinary CF members that the planned size of DQOL and the loss of its ability to report frequently and directly to the DM and CDS, as the PMO had done, would necessarily mean a reduced focus on quality of life and an inability to meet members' expectations that had been significantly raised by the advances made since the PMO was established. As it developed, DQOL came to be organized with a staff of 22 (including consultants and temporary support positions) formed into seven teams: initiatives, accommodation policy, monitoring, family policy, morale and welfare policy, Ready for Release, and research. Although organized slightly differently, the major activities of DQOL are much like those of the PMO. Completion of the SCONDVA recommendations is a major activity. The Directorate acts as a centre of policy development for those areas not otherwise covered within the matrix. Researchers assigned to the Directorate concentrate on major projects such as the analysis of the effects of operational tempo (OPTEMPO) and personnel tempo (PERSTEMPO).<sup>7</sup> The Directorate continues to receive and analyze QoLIF inputs, and is planning the next instalment of the Quality of Life Survey to assess progress.

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<sup>7</sup> OPTEMPO is generally used to describe the effects of operational and training activities accomplished while deployed or otherwise away from the primary duty location. PERSTEMPO is defined as a combined measure of OPTEMPO and the duty load associated with the normal place of duty that is not away from home.



## THE REVIEW

### AIM

This review examines work done on one broad topic by two related but separate staff entities. With respect to the Project Management Office for the Quality of Life Project, the aim of this review is:

- to provide senior departmental management with observations, analysis and recommendations regarding the effectiveness of the Quality of Life Project and the extent to which its accomplishments have contributed to an increased quality of life for CF members; and

With respect to the Directorate of Quality of Life, the review aim is:

- to examine requirements for sustaining efforts in support of quality of life.

### METHODOLOGY

The following methodology was applied:

- Survey, literature and file reviews.
- **Stakeholder Interviews.** The review team conducted approximately 110 interviews. Interview subjects included Regular and Reserve Force senior leaders (both commissioned and non-commissioned) at National Defence Headquarters (NDHQ); unit Commanding Officers, senior staff and senior enlisted members; health care professionals and care givers both at Headquarters and in the field; and selected senior staff in the Canadian Forces Housing Agency and the Canadian Forces Personnel Support Agency.
- **Focus Groups.** The review team facilitated a total of eight focus groups. One was conducted at NDHQ and the remainder with Naval Personnel at Halifax, Air Force personnel at Trenton, and Army personnel at Edmonton. In that the interviews in NDHQ concentrated on leadership and policy developers, the focus groups in the field concentrated on junior officers and non-commissioned members and on mid-level leadership at units. The focus groups were aimed at gathering data pertinent to a study of the project, such as awareness of initiatives, rather than at how the individual members saw their



own quality of life. As such, there was no need for or attempt to be representative of overall CF population beyond service, rank level and mix of operations and support positions. Along with data supporting the primary aim of the focus groups, group participants presented the review team with anecdotal evidence of both QOL problems and successes.

## SCOPE

The review concentrated on work conducted by the Quality of Life Project Management Office and on the activities of the follow-on organization, the Directorate of Quality of Life especially as it continued the work initially begun by the PMO in response to the SCONDVA recommendations. While staffs working on quality of life issues internal to the Environmental Chiefs were interviewed, information gathered was concentrated on their interaction with the PMO in the discharge of its mandate. As CRS had addressed aspects of housing, the Military Family Services Program and care of the sick and injured in other reviews or evaluations, the review team concentrated its efforts on other activities of the two quality of life agencies. The review focused on management activities. Independent assessment of the quality of life of CF members and their families was beyond the resources and capability of the review team and did not form part of the review scope. Given the management orientation, major issue areas for both agencies were:

- mandate achievement;
- management framework;
- performance measurement; and
- QOL related communications internal to Defence.





## DETAILED RESULTS AND RECOMMENDATIONS

### PROJECT MANAGEMENT OFFICE (PMO) MANDATE ACHIEVEMENT

Formally described in project documents as an aim rather than a specific mandate, the Quality of Life Project was intended:

“...to implement and communicate recommendations derived from the final Standing Committee on National Defence and Veterans Affairs report, to assist the Environmental Commands and other DND agencies in the implementation of ongoing and new QOL related initiatives and to coordinate, monitor and consolidate all QOL initiatives that were, are being or will be implemented throughout the Canadian Forces.”

The Project completion report lists the status of each of the 111 initiatives being carried by the PMO at end August 2001 and the status of activity on the recommendations upon which they were based:<sup>8</sup>

<u>Recommendation Source</u>	<u>Completed</u>	<u>Underway</u>	<u>Archived/Not started</u>	<u>Total</u>
SCONDVA	63	14	12	89
Tiger Team	60	44	12	116

With respect to the aim to implement the recommendations from the SCONDVA report:

- The PMO was unable to report completion of all 89 recommendations (SCONDVA did not specify a completion timetable but did mandate progress reporting). Early project documents acknowledged that the PMO was unlikely to be able to action all recommendations during its life and discussed the need for an agency, then thought to be the Secretariat, to assume unfinished work.<sup>9</sup>

<sup>8</sup> Initiatives do not add up to the 111 specified in the completion report due to the combination of related SCONDVA and Tiger Team recommendations into the specific initiatives undertaken by the PMO.

<sup>9</sup> Details concerning completion of specific initiatives can be found at: [http://www.forces.gc.ca/hr/scondva/engraph/2002AnnexB\\_e.asp?cat=1](http://www.forces.gc.ca/hr/scondva/engraph/2002AnnexB_e.asp?cat=1).



- Incomplete initiatives fall into a number of categories. As discussed above, a number of initiatives required extensive preparatory work and sometimes the development of new policy (such as the Accommodation Vision 2020 published in 2003) or formal Cabinet submissions. Some initiatives were subsumed in larger initiatives, such as the inclusion of work on a special allowance for Alert into a much larger study of CF allowances in general. Those subsumed either saw slower progress or were, like those awaiting the comprehensive accommodation requirement study in 2004/2005, set aside until the larger study could commence.
- While the Project Charter planned that the Project would monitor and manage QOL-related activities and implement the SCONDVA recommendations, the conduct of the activities would require active participation by external agencies – generally functional staffs in the NDHQ matrix and agencies such as CFHA or CFPSA. The majority of the initiatives not completed at Project close were being worked within the matrix. Interviews with staffs both in the PMO and in a number of external agencies indicated that completion of some initiatives might have been more timely if the PMO had better access to information from the action agency on progress and finances, and had accountabilities been more clearly delineated for all participants. Better information on initiative status, planned or expended resources, and problems anticipated or encountered, might have enabled the PMO to make better use of the authority inherent in the SRB. Accountabilities are further discussed under Management Framework.

With respect to communicating QOL recommendations:

- Initial communications between the PMO, the Tiger Team and the SCONDVA Support Team enabled the PMO to respond quickly following tabling of the SCONDVA report and to make maximum use of the very narrow window of opportunity between the report and Treasury Board submission requirements.
- Communications between the PMO and the ECS Working Group enabled the PMO to be kept aware of those activities carried out by the Environmental Chiefs of Staff (ECS's) in support of their internal programs and avoid duplication of effort. The project aim calls for the PMO to “coordinate, monitor and consolidate” QOL efforts throughout the CF. Coordination and monitoring were accomplished, although with difficulty as noted above, but consolidation of initiatives undertaken by the three environments took place only for those initiatives common to all members of the CF. Initiatives unique to and funded by the three environments remained an environmental activity.
- The Quality of Life Information Form provided a mechanism for direct communication from the individual CF member or family member to the PMO.



- In initial planning and project documentation, the PMO recognized the importance of communications with CF members. Many initiatives had extensive communications plans. Despite the use of briefings to COs and units, “Maple Leaf” articles, web sites on the Defence Information Network and notification to the general membership of the CF in CANFORGEN messages, the review team was told during interviews and focus groups of instances of poor communications to the shop floor or mess deck. These will be discussed under Communications below.

## DQOL MANDATE ACHIEVEMENT

Stated as a mission rather than a mandate, DQOL is to:

“...act as a focal point for and contribute to improvements in the quality of life of CF members and their families.”

Where the PMO was largely concentrated on the recommendations of SCONDVA and the Tiger Team and on redressing a situation that had arisen during a period in the 1990s, the DQOL mission reflects the institutionalization of QOL and the need for ongoing attention. Although unstated in its mission, DQOL is responsible for monitoring (and in a few cases actively working) the SCONDVA initiatives carried over from the PMO. In addition to monitoring and reporting progress on initiatives already in work, DQOL staff told the review team that they see their roles as:

- coordination and liaison on QOL issues with ECSs, others in the NDHQ matrix and third parties (e.g., DGCB, CFPSA) to identify and analyze emerging QOL issues and trends, help assess needs and set priorities, and help develop approaches to address them;
- shaping QOL issues in policy;
- communicating QOL issues and trends with all levels;
- assessing the impact of QOL initiatives and other interventions on QOL; and
- monitoring the QOL of CF members and their families.

In keeping with its role, DQOL maintains communications with the environmental staffs, matrix organizations and defence agencies and has developed a number of new initiatives such as the Depart With Dignity Program. One aspect of work in the QOL area taking on a greater importance, especially as more social support type mechanisms are put in place or improved, is quality of work life. Researchers attached to DQOL are progressing with a major study of CF PERSTEMPO in support of policy development. This research and other QOL related topics are shared with allies in Australia, New Zealand, the United Kingdom, and the United States through a Military Human Resources Issues sub-group of The Technical Cooperation Program (TTCP). Through these fora, research is exchanged, techniques discussed, and results compared, where appropriate. Due to the nature of the topic, differing QOL models, data gathering methods and environmental factors, comparisons must be made very carefully to be meaningful.



While acting as a focal point for quality of life issues and contributing to improvements in quality of life for members and their families seems reasonably straight forward as a mission, it is open ended and may not be particularly conducive to specific activity. It provides no guidance as to a clear vision or goal that is to be achieved other than improvement. In spite of the soft nature of the topic, there are well-understood, hard organizational outcomes that quality of life supports. Recruiting and retention are two examples. Just as global quality of life has been divided into five domains so that the organization can eventually measure and understand how its outputs are affecting quality of life, the organization needs a goal that all elements can relate to and which helps place their activities in context. Improvement in quality of life is indeed something that is desired, but how much improvement, at what cost, and with what priority over improvements in other areas, are all questions that must be answered to help an organization focus its energies and resources. The addition of the vision or strategic goal to the mission as in "... act as a focal point for and contribute to improvements in the quality of life of CF members and their families in support of establishing and maintaining the CF as an employer of choice" would operationalize a soft concept without de-emphasizing the aspect of support to the member and family. Likewise, a strategic plan for quality of life would promote efficiency and support a coherent, proactive approach to QOL issue management. Such a plan should be developed based on results of ongoing risk analysis and needs assessment (a key element of which is effective internal monitoring as discussed above), and be the basis for initiative prioritization and resource allocation directed at a clear organizational outcome.

#### Recommendation

Develop a strategic plan to ensure that allocated resources and activity reflect current and emerging QOL needs to maintain the CF as an employer of choice. Such a plan would ensure a strategic QOL focus that facilitates the proactive prioritization and alignment of QOL initiatives with requirements based on a detailed risk analysis and needs assessment, and should be reviewed and updated at regular intervals.

## PROJECT MANAGEMENT OFFICE (PMO) MANAGEMENT FRAMEWORK

As discussed above, the Quality of Life Project was considered one of the highest priorities in Defence when it was authorized. It was reported to be the first Human Resources project that used traditional major crown acquisition project methods and structures. A number of interviews indicated that one aspect critical to the amount of work accomplished was the composition of the Senior Review Board under the co-chairmanship of the CDS and DM. This not only provided tangible demonstration of the importance of the Project but also an important direct linkage to the Minister and, through the Minister, to the Treasury Board. With Project leadership assigned to ADM(HR-Mil) and with SRB membership at the Assistant Deputy Minister and Chief level, there should have been no question as to the support provided to progress by those agencies outside of the PMO.



There is also evidence that the practice of establishing the Secretariat and Tiger Team in parallel with the PMO was beneficial. A number of interviewees indicated that the concurrent activity conducted on quality of life issues enabled the PMO to complete the necessary work on Project structure and Treasury Board submissions within the extremely short period available. Project documentation and guidance was generally comprehensive and in keeping with that of a major crown project.

The manner in which initiatives were assigned to elements of the matrix for action, however, did not always permit the PMO to have visibility into progress of work or into the allocation of resources. Interviews with both Project staff and matrix staff indicated that responsibilities were not always clear. This caused some confusion within the matrix and for those members of the CF who needed either information or direction on a particular initiative. In its Completion Report, the PMO offers:

“A clear delineation must be made at the outset of the project between who has the responsibility and authority to develop and alter the regulatory framework, including the policy, vision, strategy, constraints, and regulations, and who has the responsibility to carry it out.”

Interviews also support the PMO lesson learned that:

“...it took a while for the HR matrix to respond to the idea of timelines, with cash flow, related to production of deliverables in the form of policies, DAODs, QR&O amendments...etc.”

## **DQOL MANAGEMENT FRAMEWORK**

The management structure of DQOL reflects the broader, institutionalized mandate of the organization. While it is still concerned with advancing and reporting the work on the remaining SCONDVA initiatives, the Directorate’s work is now more involved with new initiatives, especially those dealing with Quality of Work Life, and policy development. The organization of the Directorate has changed from that of the Project Management Office and, according to staff interviewed, adequately supports the broader objectives. The institutionalization of QOL is also seen in the placement of DQOL in the matrix reporting to the Chief of Staff ADM(HR-Mil) rather than as a project organization reporting to a Project Leader and an SRB.

The major activity of the Project Management Office concerned the SCONDVA initiatives – the formulation and staffing of new initiatives took an appropriate, although smaller relative portion of overall effort. The SCONDVA initiatives were presented to the PMO virtually fully developed and, in most cases, with specifics in terms of desired result – “That effective 1 April 1999 the pay for Privates, Second Lieutenants and Lieutenants, essentially entry level ranks, be increased by not less than 10 per cent”. The Directorate does not have the benefit of having new initiatives in support of Quality of Life defined for it. To help DQOL define what is possible,



it must understand the linkages between the resources available, its own activities and those of the agencies it works with, the range of possible outputs or the things it can produce, and the results to be achieved, or outcomes, in support of organizational goals. The production of a management framework would help the Directorate link the hard outputs like a Treasury Board submission substantiating increased funding to support a 10 per cent pay increase, with the softer outcome of maintaining the CF as an employer of choice and decreasing unforecast attrition. A Results-Based Management and Accountability Framework,<sup>10</sup> or something very much like it, would:

- produce a clear and logical program design that ties resources to expected outcomes;
- produce a logic model that shows a sequence of activities, outputs and a chain of outcomes for the program or initiative;
- determine appropriate performance measures and a sound performance measurement strategy that allows managers to track progress, measure outcomes, learn and make improvements on an ongoing basis; and
- support effective reporting on outcomes.

Like the PMO before it, the Directorate has responsibility for coordinating the efforts of those agencies in the matrix with responsibility for staffing specific initiatives, such as Director General Compensation and Benefits for pay raises or Director General Military Careers for postings. The active involvement of these agencies in developing the management framework would significantly reduce the likelihood of confusion with responsibility and accountability as was encountered by the PMO.

#### Recommendation

Develop, for each major new initiative in support of the overall QOL strategy, a comprehensive management framework (i.e., *Results-Based Management and Accountability Framework*) that supports the TBS objective of “managing for results”.

## PROJECT MANAGEMENT OFFICE (PMO) PERFORMANCE MEASUREMENT

Project documentation indicates that the PMO understood that there were two areas in which performance monitoring was important – global QOL and initiative management. The first activity undertaken in support of measurement of overall quality of life was the commission to DHRRE for the Quality of Life Survey. With no existing method of drawing a baseline from which to measure success (or even to ask meaningful questions without the QOL model that was developed to support the questionnaire) the PMO recognized

<sup>10</sup> For more information on a Results-Based Management and Accountability Framework (RMAF) see [http://www.tbs-sct.gc.ca/eval/pubs/RMAF-CGRR/rmaf\\_cgr\\_e.asp](http://www.tbs-sct.gc.ca/eval/pubs/RMAF-CGRR/rmaf_cgr_e.asp) published by the Treasury Board Secretariat.





that measuring and monitoring might not be as meaningful as they could be. Even though the primary focus of the PMO was on completion of SCONDVA initiatives, measurement activity was given a high priority, as the baseline developed would be necessary for future work. To that end, DHRRE developed, administered and analyzed the first CF survey on QOL. Time was limited, however. The time needed to research the topic and administer the survey coupled with the need for a suitable period between surveys (so that a change could be seen over time) – not to mention the cost of each issue of the survey – meant that the PMO would be unable to issue the survey twice and directly measure the effectiveness of their efforts. The survey did provide data, though, that enabled the PMO to gain insight into areas of satisfaction and dissatisfaction with quality of life and to validate the chosen model of QOL.

Without the benefit of multiple surveys and a second data set, the PMO relied upon direct input from CF members and their families. The Quality of Life Information Forms was used as an indicator of overall change in perception of QOL, understanding that the absence of complaint is not a reliable indicator of improvement in and of itself. Knowing that data from a second survey would not be available for review purposes, the review team made it a point to discuss members' perceptions of overall QOL during focus group sessions. Although some specific areas continued to cause dissatisfaction, the majority of focus group participants expressed the belief that, overall, quality of life had improved since the Project Management Office began its work.

The second area of performance measurement addressed by the PMO was in initiative management. As mentioned above, initial project documentation was generally comprehensive. However, the review team, as well as some interviewed staff, assessed the performance measurement strategy as less useful. While the strategy covers each of the initiatives and describes results, objectives, outputs, outcomes, measures, indicators and standards for each, data were often hard to gather (“reputation of the CF with regards to the treatment provided to CF members suffering from PTSD”), and criteria either arbitrary (“80 per cent of CF members are satisfied that the leave policy is meeting their needs”), or vaguely defined (“all CF members can afford suitable accommodation in their respective locations”). Pertinent, readily available data were not always gathered and analyzed. Although SISIP was engaged and funded to provide financial counseling services for example, data on usage compiled by SISIP for their own management purposes, was not requested by, or otherwise provided to, the PMO. The performance management framework does not specify who is to gather the data, how often it is to be gathered or what is to be done with the data. As a result, the performance management scheme for each initiative quickly fell into disuse and the main measurement of initiative management was in tracking and reporting initiative completion.

## **DQOL PERFORMANCE MEASUREMENT**

The Directorate has many of the same performance measurement requirements as did the PMO. Challenges remain for both initiatives carried over from the PMO, as the initial measurement scheme has not changed appreciably, and for management of new initiatives. When updating existing measurement schemes or drafting new ones, the Directorate staff should keep in mind that the measurements



must support achievement of the desired outcomes rather than simply producing outputs. Success at improving the quality of life of members and their families cannot be measured by numbers of policies staffed, DAODs produced or initiatives implemented. The adoption of a Results Based Management and Accountability Framework, as described above, would significantly aid performance management as key steps include agreements on what needs to be measured, who is to do it and how it is to be collected and analyzed.

With respect to measurement and monitoring of global QOL, DQOL continues PMO efforts to assess the impact of initiatives and to monitor the ongoing state of the QOL of members and families. Work is concentrated in two areas. First, DQOL is preparing for a re-issue of the Quality of Life Survey, first distributed in 2001, and building on the baseline that survey provided. Secondly, the work started by the PMO with the Quality of Life Information Forms is continuing. The review team has expressed concerns to DQOL about the approach. The questionnaire, likely able to provide very useful data over a series of surveys, is a major undertaking and consumes considerable resources and time both on the part of members and families and on the part of Defence. During interviews and focus groups the topic of “survey fatigue” came up a number of times. While the QoLIFs are likewise a useful tool, they are insufficient as a primary method of assessing the overall organization’s QOL. Those submitting a form cannot be considered a representative grouping. There may be other sources of information. The Department and CF collect data and conduct research in a number of areas that might relate to global quality of life or to a specific domain. Redresses of Grievance are registered and tracked. Forces personnel are asked to complete a questionnaire on release. Usage of Family Resource Centres is monitored. As mentioned, data on members referred to financial counselling are kept by SISIP. There have been a number of health and wellness surveys administered over the past few years. It may be possible to combine existing data, some of which is currently reported and tracked on an on-going basis, to form a “red flag” or early warning system. This type of system is used in areas such as fraud detection, to indicate a departure from normal patterns that warrants investigation – not necessarily that honours and awards is a problem for example, but that honours and awards may benefit from being looked at and analyzed for emerging problems or an existing condition that might need remedy. Such a system could considerably augment planned monitoring activities with a more pro-active, ongoing scan of the QOL environment.

#### Recommendation

DQOL research the formulation of a QOL monitoring system to provide early warning of QOL problems. The system would use proxy data already gathered in the CF and Department and appropriate surveys conducted for related HR purposes.



## COMMUNICATIONS

Communications issues apply equally to the PMO and the Directorate of Quality of Life. The importance of communication between the PMO/Directorate and members was well understood from the beginning of the process. Project documentation contains a number of references to communications plans and the need for members and their families to understand QOL-related activities so that benefits can be accessed and problems solved. Both the PMO and Directorate staffs have made use of available Departmental communications avenues such as CANFORGEN messages, the Maple Leaf, Personnel Newsletter, visits and briefings to units and addresses to Base and Wing Commanders' conferences. Despite PMO efforts at communicating with the CF membership, communications issues were raised frequently during discussion periods at focus groups and in interviews conducted as part of the review. Examples include:

- Members making an initial application for the Post Living Differential (PLD) allowance were told by their supervisors, “I don't know how this works, but apply for it anyway.” When the review team asked focus group members about their knowledge of, and satisfaction with, PLD, virtually all members were aware of the program but very few understood its application. In focus groups, satisfaction with PLD was generally low until the review team explained its operation. Having received the explanation, the majority of those who had expressed dissatisfaction reversed their position. Post Living Differential and its application constitute the largest single category of complaints and questions received by Quality of Life Information Forms. Despite being a remedy to issues raised to SCONDVA and one of the most significant improvements to members' overall compensation and benefits, PLD was largely misunderstood and a significant dissatisfier for many over a significant time period.
- Although the program was actually in place before the increased emphasis on quality of life, the Contingency Cost Move program, which came to be commonly known as QOL moves, was also an issue raised with the review team during focus groups and interviews. In essence, funds for personnel postings in support of mitigating individual problems for members – postings nearer to relatives with support issues for example – had been managed and administered by the staff of the Director General Military Careers for some time. In that this avenue to address personal needs was not widely known, the PMO undertook a communications campaign to make members more aware of its existence. While successful in widening awareness of the program, the communications campaign was less successful in emphasizing the requirements and restrictions of the program, such as the primacy of meeting needs of the Forces and the fact that there has to be an available position that the requester could fill and effectively perform in. The communications strategy was also less successful in communicating who had responsibility for the program, how applications were to be made and that there were, in fact, limited opportunities due to funds available and programmatic restrictions. Of the 190 requests received over a 12 month period and analyzed by the review team, 61 were supported and resulted in 54 moves (some requests were in fact to remain



in a location and not move). Communicating that the program existed without clearly communicating who administered the plan and that the plan had restrictions, raised expectations among the membership that could not be met and caused frustration among members making applications, in the chain of command and with social workers staffing recommendations, and for NDHQ matrix staff involved in the approval process.

- The issue of performing in a position established for a higher rank during the absence of the person in that position was raised to SCONDVA. The complaint essentially centred around a subordinate not being compensated for doing the supervisor's job while the supervisor was deployed on operations or otherwise away for a significant period. As for the contingency cost move situation, the Department supported the SCONDVA recommendation and put an initiative in place to address the inequities based upon existing policies. Also, as in the contingency cost move situation, the Program was not thoroughly communicated to members with respect to restrictions, significantly raising expectations that could not be met and causing frustration. Confusion as to application of the policies likely led to perceptions of uneven application at the unit level. Members of focus groups and interviewees told the review team that many believed that one simply had to fill in for a period of time in order to receive the pay for the higher rank. In fact, provision for temporarily "filling in for the boss" was already a component of compensation methodology and acting rank was deemed appropriate only for very limited application and with numerous restrictions so as not to perturb classification rank structures and the merit-based promotion system.

These three examples share two common elements. First, although the PMO had a communications plan in place, the management of those activities with respect to monitoring for success and measuring performance could have been improved. A common feature of communications strategies throughout the Department and CF involves electronic publishing. The review team was told a common problem for some members is regular access to a computer terminal and the Defence Information Network (DIN). Likewise, access to the Maple Leaf or other printed material may be restricted for families of deployed members. Success in communicating is measured better in, for example, spot checks or interviews to measure understanding rather than in counting visits to a web site or QoLIFs received about a particular policy. The second issue is the role of the chain of command. Irrespective of how robust the communications strategy is, significant elements of communications concerning quality of life are outside of the control of the Directorate and in the hands of, indeed is the responsibility of, the chain of command. The chain of command must be equipped not only with knowledge of the existence of an initiative, but also with the ability to explain the associated procedures and restrictions and rationale. A well-researched, well-staffed initiative can still negatively affect global QOL if the chain of command fails in its role.



**Recommendation**

Ensure future communications strategies include performance measurement components and target the member, the members' families, and the chain of command as each has differing information needs. Strategies should be broad enough to embrace multiple media and not reliant on a single technology or communications path.

**SUMMARY OF RECOMMENDATIONS**

1. Develop a strategic plan to ensure that allocated resources and activity reflect current and emerging QOL needs to maintain the CF as an employer of choice. Such a plan would ensure proactive prioritization and alignment of QOL initiatives based on a risk analysis and needs assessment, and should be reviewed and updated at regular intervals.
2. Develop, for each major new initiative in support of the overall QOL strategy, a comprehensive management framework (i.e., *Results-Based Management and Accountability Framework*) that supports the TBS objective of “managing for results.”
3. Formulate a QOL monitoring system to provide early warning of QOL problems. The system would make use of data (proxy or otherwise) already gathered in the CF and Department as well as surveys conducted.
4. Ensure future communications strategies include performance measurement components and customized approaches to reach target audiences, including members, their families, and the chain of command as appropriate – each has differing information needs. Strategies should embrace multiple communications channels and not be reliant on a single technology or communications path.



### MANAGEMENT ACTION PLAN

CRS Recommendation	OPI	Management Action
<p><b>Mandate Achievement</b></p> <p>Develop a strategic plan to ensure that allocated resources and activity reflect current and emerging QOL needs to maintain the CF as an employer of choice. Such a plan would ensure a strategic QOL focus that facilitates the proactive prioritization and alignment of QOL initiatives with requirements based on a detailed risk analysis and needs assessment, and should be reviewed and updated at regular intervals.</p>	<p>ADM(HR-Mil)</p>	<p>Strategic outcome-oriented objectives with associated activities, resource implications, and linkages to departmental priorities will be developed and included in the DQOL Level III Business Plan. Strategic outcomes could include:</p> <ul style="list-style-type: none"> <li>- Members/families are well informed about QOL initiatives.</li> <li>- Members are satisfied with their work-life balance.</li> <li>- Families are satisfied with the support they receive.</li> <li>- Members/families are well prepared for the transition to life after the CF.</li> <li>- Members/families are satisfied with the housing they chose (affordability, condition, etc).</li> </ul> <p>DQOL mission statement will be amended to include a clear strategic outcome to be achieved – an outcome that is relevant to CF members and their families and that encapsulates the activities conducted by DQOL. New mission statement will be promulgated in DQOL Business Plan and on the Directorate web site.</p> <p>Review of QOL domains has been initiated to properly categorize and scope the work done within DQOL, and to ensure the continued relevance of domains.</p>





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<b>Mandate Achievement (cont'd)</b>	ADM(HR-Mil)	<p>Internal review initiated to properly define the conditions and extent of DQOL's "policy oversight" responsibilities in the areas of accommodation, morale and welfare and family services.</p> <p>DQOL currently has a work plan matrix (activities and output oriented) that is reviewed on a monthly basis to confirm the status and priority of the work, and to confirm that the requirements are still valid</p> <p>Target Completion Date September 2004.</p>
<p><b>Management Framework</b></p> <p>Develop, for each major new initiative in support of the overall QOL strategy, a comprehensive management framework (i.e., <i>Results-Based Management and Accountability Framework</i>) that supports the TBS objective of "managing for results".</p>	ADM(HR-Mil)	<p>A briefing on Results-Based Management and Accountability Framework (RMAF) process was provided to all DQOL staff by CRS in March 2004. RMAF guide developed and distributed to team leaders to facilitate the production of an RMAF. Direction provided to all DQOL staff to develop and RMAF for major policies, programs or initiatives and especially for new initiatives that involve inter-departmental working groups.</p> <p>A formal RMAF will not be produced for policies, programs and initiatives currently in progress, however the RMAF elements will be considered before the completion of the work to ensure a results-based approach, and to clearly identify outputs, outcomes, performance measurement and evaluation criteria.</p> <p>Complete.</p>



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<p><b>Performance Measurement</b></p> <p>DQOL research the formulation of a QOL monitoring system to provide early warning of QOL problems. The system would use proxy data already gathered in the CF and Department and appropriate surveys conducted for related HR purposes.</p>	<p>ADM(HR-Mil)</p>	<p>A review is currently conducted of reports/studies distributed to DQOL to determine the potential for a QOL impact (e.g., Retention study, work-life balance study).</p> <p>A third Defence Scientist (DS) will be hired summer 2004 (assuming no restrictions on public service hiring). The primary responsibility of this DS will be to complete ongoing assessments of emerging QOL trends, problems and opportunities by reviewing data from a variety of departmental and other department sources, reports from other military forces, open literature on QOL research, etc.</p> <p>DQOL provided questions to DHREE for a Continuous Attitude Survey (CAS) to be administered annually commencing in 2004. The CAS will provide feedback on a number of topics including QOL issues and will provide a measure of continuous feedback from members on QOL.</p> <p>Increased emphasis on performance measurement and monitoring is key to relevance and effectiveness of the work within DQOL. Implementation of the RMAF process will improve the performance measurement and monitoring functions by forcing an evaluation of the effectiveness of the policy, program or initiative. The role of the Directorate Chief Warrant Officer (CWO) will be expanded in 2004 to include formal liaison with Environmental and Group Principal CWOs and Base/Wing CWOs to confirm that the policies, programs and initiatives are improving the QOL of members and their families, and to provide feedback on QOL issues.</p> <p>Target Completion Date October 2004.</p>



<b>CRS Recommendation</b>	<b>OPI</b>	<b>Management Action</b>
<p><b>Communications</b></p> <p>Ensure future communications strategies include performance measurement components and target the member, the members' families, and the chain of command as each has differing information needs. Strategies should be broad enough to embrace multiple media and not reliant on a single technology or communications path.</p>	ADM(HR-Mil)	<p>Directorate Communications Strategy will be amended to include more robust performance measurement criteria to confirm that the message has been received and understood.</p> <p>The role of the Directorate CWO will be expanded in 2004 to include formal liaison with Environmental and Group Principal CWOs and Base/Wing CWOs to ascertain the effectiveness of communications regarding QOL programs and initiatives.</p> <p>When an RMAF is developed for a new policy, program or initiative, an evaluation of the effectiveness of the communications plan will be an element of the framework.</p> <p>DQOL has been and will continue to discuss the effectiveness of communications at regularly scheduled internal professional development and Directorate planning sessions.</p> <p>DQOL will continue to analyze QOL Inquiry Form data to determine possible trends and to identify to policyholders and Subject Matter Experts the requirement to clarify policy when necessary.</p> <p>DQOL will continue to take advantage of various visits, forums, courses, conferences etc to brief audiences on QOL issues, progress and successes.</p> <p>Target Completion Date September 2004.</p>

