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Chief Review Services Chef - Service d'examen

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Evaluation of CF Outside Canada (OUTCAN) Exchange and Liaison Programs

June 2006

1258-67-2 (CRS)



Canada 

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LIST OF ACRONYMS AND ABBREVIATIONS

ABCA	America, Britain, Canada, Australia	CMS	Chief of the Maritime Staff
ADM(IE)	Assistant Deputy Minister (Infrastructure and Environment)	CMP	Chief Military Personnel
ADM(IM)	Assistant Deputy Minister (Information Management)	Col	Colonel
ADM(Mat)	Assistant Deputy Minister (Materiel)	CRS	Chief Review Services
ADM(Per)	Assistant Deputy Minister (Personnel)	CSE	Communication Security Establishment
ATL	Advanced Training List	DAOD	Defence Administrative Order and Directive
C2	Command and Control	DCBA	Director Compensation and Benefits Administration
Capt	Captain	DCDS	Deputy Chief of the Defence Staff
CAS	Chief of the Air Staff	DGLCD	Director General Land Capability Development
CDA	Canadian Defence Attaché	DGMC	Director General Military Careers
CDLS(W) (L)	Canadian Defence Liaison Staff (Washington) (London)	DMCARM	Director Military Career Administration and Resource Management
CDS	Chief of the Defence Staff	D Mil C	Director Military Careers
CENTCOM	Central Command	DND	Department of National Defence
CF	Canadian Forces	DND/CF	Department of National Defence and the Canadian Forces
CFAO	Canadian Forces Administrative Order	EAC	Evaluation Advisory Committee
CFIOG	Canadian Forces Information Operations Group	EALP	Exchange and Liaison Program
CFSEME	Canadian Forces School of Electrical and Mechanical Engineering	EME	Electrical and mechanical engineer
CFSU (O) (E) (C)	Canadian Forces Support Unit (Ottawa) (Europe) (Colorado)	HQ	Headquarters
CFLLU	Canadian Forces Logistic Liaison Unit	ILOC	Integrated Lines of Communication
CFILO	Canadian Forces Intelligence Liaison Staff	IP	International Program
CF H Svcs Gp HQ	Canadian Forces Health Services Group Headquarters	JAG	Judge Advocate General
CFMA	Canadian Forces Military Attaché	JHQUK	Joint Headquarters, UK
CIFOG	Canadian Forces Information Operations Group	L1	Level 1
CINCPAC	Commander in Chief Pacific	LF	Land Force
CLS	Chief of the Land Staff	LFIP	Land Force International Program
		LFIP WG	LFIP Working Group
		LS	Land Staff
		LO	Liaison officer



Lt	Lieutenant	OUTCAN	Outside Canada
LCol	Lieutenant-Colonel	PESCAA	Permanent Executive Secretariat,
LCdr	Lieutenant-Commander		Conference of American Armies
Maj	Major	QMIC	Quadripartite Medical Intelligence
MGen	Major-General		Committee
MARPAC	Maritime Pacific	R&D	Research and development
MOU	Memorandum of Understanding	SJS	Strategic Joint Staff
MSGU	Military Support Guard Unit	SLT	Second Language Training
NATO	North Atlantic Treaty Organisation	TOR	Terms of reference
NDHQ	National Defence Headquarters	TOS	Terms of service
NIMA	National Imagery and Mapping Agency	UK	United Kingdom
NORAD	North American Aerospace Defence	US	United States
NORTHCOM	Northern Command	USN (OPF)	United States Naval (Ocean Processing
NSA	National Security Agency		Facility)
OCI	Office of Collateral Interest	VCDS	Vice Chief of the Defence Staff
OPI	Office of Primary Interest		



SYNOPSIS

Chief Review Services (CRS) has completed an evaluation of the Canadian Forces (CF) Exchange and Liaison Program (EALP) to provide the Department of National Defence (DND)/CF senior management with information on the relevance, benefits and costs of various CF Outside Canada (OUTCAN) military EALP. During the conduct of this evaluation, former exchange officers and current liaison officers were surveyed, process reviews were completed with sponsors of the Program, and interviews were conducted with key stakeholders. The scope of this report includes 345 exchange and liaison-like positions which we determined to have an approximate annual cost of \$64M, but excludes approximately another 1,200 OUTCAN positions governed under other operational programs, including the North American Aerospace Defence (NORAD) and the North Atlantic Treaty Organisation (NATO) positions.

The objectives of the exchange postings are to augment and extend the level of operational and technical knowledge and skills essential to the CF, and to create an atmosphere of goodwill and a sense of cooperation between the CF and participating foreign forces through the exchange of selected members. For liaison postings the objectives relate to obtaining exchange information regarding tactics, equipment and research and development in support of key cooperative programs.

A main issue revolves around a lack of corporate oversight to ensure the numerous exchange and liaison positions operating under a number of different agreements are optimally utilizing resources. The 345 positions included in the scope of this study comprise 208 that come under the EALP itself, and another 137 similar positions that exist outside of the program to respond to the changing needs of Level 1 organizations within the DND/CF. The positions under the EALP have existed without challenge for an extended period of time, and need to be analyzed and rationalized in terms of current CF strategies.

In general, the organizations sponsoring EALP positions are not meeting program requirements in terms of managing the positions, including: informing incumbents of position objectives, monitoring their reports and providing feedback, planning for successors, exchange and liaison positions, these benefits are not monitored or measured. For the most part the value is often stated more in terms of professional skills development of the member rather than a benefit to the organization.

The recommendations stemming from this study address aligning the EALP with CF needs and priorities, developing a corporate governance structure for exchange and liaison-like positions that includes streamlined direction and a corporate oversight committee, rationalizing all existing EALP and similar programs and positions for continued relevance against standardized criteria, improving program effectiveness through measures to increase program flexibility, improving access to information for liaison officers on foreign postings, and facilitating the more efficient transfer of knowledge gained on return from a posting.

CRS also worked with an Evaluation Advisory Committee created for this evaluation to develop a performance measurement framework for the EALP that we recommend for approval and implementation.



RESULTS IN BRIEF

Introduction

The 2004/2005 Chief Review Services (CRS) Work Plan included an evaluation of the Canadian Forces (CF) Exchange and Liaison Program (EALP). Study planning commenced in October 2004 and the report was developed in June 2005. The scope of the study was expanded to include other CF exchange and liaison programs/positions outside Canada (OUTCAN) when it was deemed necessary to present a more complete picture. The purpose of the evaluation study was to provide Department of National Defence (DND)/CF senior management with information on the relevance, benefits and costs of various CF OUTCAN military EALP. Included in the scope of this study are 345 exchange and liaison-type positions at an approximate annual cost of \$64M. Approximately 1,200 OUTCAN positions governed under other operational programs (e.g., North Atlantic Treaty Organisation (NATO), North American Aerospace Defence (NORAD), etc.) are excluded. An Evaluation Advisory Committee (EAC) consisting of Level 1 (L1) EALP representatives was established to provide advice to the CRS evaluation team throughout the planning and reporting phases.

Background

CF EALPs, consisting of 182 exchanges and 26 liaison positions, are governed under Canadian Forces Administrative Order (CFAO) 10-4. These programs have totally different objectives. With the Exchange Program, one-for-one personnel exchanges with allied militaries are undertaken. The intention is to maintain, augment and extend levels of operational and technical knowledge and skills essential to the CF, as well as create an atmosphere of goodwill and cooperation among participating countries. Military members on exchange are intended to work directly for or be imbedded into the host country's operations and, by doing so, return to their parent country with new knowledge and skills that will result in individual and organizational benefits. The Liaison Program, conversely, is not an exchange of personnel. It is a two to three year assignment of CF personnel to various OUTCAN key locations of strategic, operational or tactical importance. The host country accredits CF liaison officers (LO) to obtain and share information with Canada related to doctrine, tactics, training, equipment and research and development (R&D) on an ongoing basis. Various CF L1 organizations sponsor both exchange and liaison positions.

The EALP has existed since the 1960s. Historically, CF ceilings on the number of positions were placed on the Programs by the Vice Chief of the Defence Staff (VCDS). Until 1997, the EALP was corporately managed and funded. In 1997, management of the EALP was devolved to L1s with the funding remaining at the corporate level. L1s identify exchange and liaison opportunities within their maximum number of positions allotted, and can also create positions over and above the allotted EALP as long as they fund them. The number of EALP positions has remained relatively constant since 1986. In addition to the EALP, there are 137 other OUTCAN exchange and liaison programs/positions that are sponsored by L1s outside the framework of the EALP.



The scope of our study did not include various other OUTCAN Programs, including NORAD (286 positions), NATO (356 positions), Military Support Guard Unit (MSGU) (83 positions), civilian exchanges (number of positions unknown), liaison positions within Canada (approximately 8 positions), and those on the Advanced Training List (ATL) assignments (approximately 70 positions).

Canadian Defence Liaison Staff offices in Washington (CDLS(W)) and London (CDLS(L)) manage our defence relations with the United States (US) and the United Kingdom (UK) respectively, and in the course of their duties have significant involvement in the EALP. To a lesser extent, Canadian Forces Defence Attachés (CDA) in various other countries have involvement in the EALP, especially the Australian CDA.

During the conduct of this evaluation, surveys were done with both former exchange officers and current LOs of the EALP. Additionally, process reviews were done with sponsors and interviews conducted with key stakeholders.

Overall Assessment

In our opinion, and based on the surveys and interviews conducted during this evaluation, the Exchange Program is providing valuable benefits to the CF in augmenting necessary skills and knowledge and in creating goodwill and trust with allied militaries. These benefits are, primarily, long term in nature and have not been quantified. Significant improvements could be made to the Exchange Program that would result in far greater benefits to the CF. These improvements could be made at the front end of the process when identifying specific CF needs that the Programs are intended to fulfill and in targeting specific exchange and liaison locations, and at the back end of the process in supporting a learning organization. It should be noted that most L1 sponsoring organizations have not been following many of the existing process controls in place due to resource constraints and reductions in coordinating staff, although many are now recognizing that additional attention is required to improve Program effectiveness. Although a previous 1987 CRS evaluation reported concerns similar to those identified in this report, few corrections have been made to tighten sponsor compliance and ensure Program benefits achievement.

The Liaison Program is also providing benefit to the CF in obtaining and exchanging information from other militaries (almost exclusively the US) of interest to the CF. Still, the CF is missing opportunities to better identify targets to ensure that the CF has access to the most current information in the areas of greatest need.

There are a number of OUTCAN exchange and liaison programs and positions administered outside the EALP. It is difficult to identify all CF exchange and liaison positions, as there is little control over the program/position establishment. Currently, there is no corporate oversight of, nor direction given to, all these programs. When all exchange and liaison programs are taken together, there is a need to ensure that there is no overlap or duplication of effort and that information is appropriately shared with all relevant CF/DND organizations.



Principal Observations

Program Relevance. We found the programs to be relevant and consistent with stated Government and CF corporate priorities and objectives.

Program Success. We found no corporate or L1 strategy that provided specific objectives or focus to the EALP, and postings, that could be used to measure program success. Nevertheless, with respect to the EALP, 92 percent of former exchange officers reported that the objectives of the Exchange Program were either totally met (66 percent) or almost totally met (26 percent). All sponsors and senior managers contacted felt that exchanges were well worth the investment in terms of developing personal skills, gaining knowledge and making contacts that would be invaluable in the future. We found anecdotal evidence that the Program provided long-term benefits to the CF in a variety of areas, including: changes to doctrine, training concepts, equipment operations and evaluation, interoperability with allies, networking/ongoing communications with foreign staff, trust in CF professional capability and understanding foreign military organizations, and capabilities and structures. Although there are many stated benefits, we did not find any monitoring or measuring of these benefits. While 72 percent of exchange officers rated using the experience and knowledge gained during their first return posting to the CF as excellent or good, only 10 percent viewed that the knowledge/experience gained was well transferred to other members of the CF. There is a long-term intangible benefit of exchanges that most feel as too difficult to quantify.

Program cost. We calculated the total incremental cost for exchange and liaison positions at \$95K per member or ~\$19M per year for the EALP. The full cost of the EALP, including fixed salaries and overhead, is approximately \$39M per year. Additionally, other exchange and liaison programs outside EALP cost approximately \$24M per year, for a total cost of \$64M. This excludes costs related to the NATO, NORAD, MSGU and ATL programs.

Performance Measures. As performance measures or indicators for the EALPs have not been established, we found it difficult to quantifiably assess to what degree the objectives of the EALP have been accomplished. In this project, CRS staff worked with the EAC to develop a performance measurement framework. It is included in this report for VCDS approval and L1 implementation.

EALP Process Controls and Delivery. We reviewed and updated logic models for the EALPs. As the long-term program outcomes, or objectives, could not be quantifiably measured, we used the existing process controls as identified in the governing CFAO 10-4 to assess program outputs or process objectives. We noted that most of the L1 sponsors were not complying with the required process controls, specifically in the following areas:

- Determining specific needs by identifying gaps in capabilities and competencies;
- Updating position descriptions and terms of reference;
- Determining specific benefits of exchange positions;
- Appropriately briefing exchange officers of expectations;



- Monitoring reports and giving feedback to exchange members;
- Providing succession planning;
- Formally transferring knowledge learned; and
- Updating/re-validating positions.

In our opinion, there are significant opportunities to improve the effectiveness of the Exchange Program. A large percentage of exchange officers also indicated that improvements to the Program were required. Forty-one percent suggested that enhanced sponsor management was necessary to increase the benefits from the Program.

The Liaison Program has a different role from the Exchange Program, as members are intended to meet CF sponsor demands for information on a recurring, as required basis. While L1 sponsors and clients felt LOs provided valuable insight into tactics, equipment, training, and other current issues of the day, many LOs felt underutilized. Most felt that sponsors had not provided enough focus for their jobs, and that better sponsor definition of information requirements would improve Program effectiveness. Accountability is also a concern, with 68 percent of LOs stating that CDLS(W) was the organization that they worked for rather than their respective sponsors.

There are 26 liaison positions in the EALP which, in most cases, have existed for 40 years. We learned of many situations where, because of changes to US military organizations and force structure, the CF has not kept current with requirements respecting the placement of LOs into locations that would best meet CF needs. Inflexibility of perceived LO ceilings and L1 allocations from within the ceilings are factors that are not based on CF needs. Several vital US Commands are currently not covered by LOs.

Other Related Programs. We noted that there were many other exchange and liaison-type programs or positions created by L1s for specific purposes outside of the EALP structure. National Defence Headquarters (NDHQ) Instruction Assistant Deputy Minister (Personnel) (ADM(Per))¹ 3/93 can authorize OUTCAN secondments/attachments to other militaries outside the CFAO 10-4 framework. Additionally, there are numerous Memoranda of Understanding (MOUs) with other militaries. We tried to summarize these programs and positions (see Annex A) although it is a difficult task since a number of exchange and liaison-type positions are “hidden” or not easily visible through corporate process controls. Given the number of exchange and liaison personnel from various programs located in the US, this could cause confusion and possible duplication of effort. From a corporate perspective, consideration should be given to ensuring that one corporate authority approves, directs and monitors all CF exchange and liaison programs and positions. We did note that some of these programs were better able to manage personnel and react to changing situations than through the EALP—likely because these programs have a specific and focused objective and that their reporting relationships to their sponsor are clear.

¹ Now Chief Military Personnel (CMP).



Governance. A 2004 VCDS-led working group commented on the issue of many command and control problems associated with OUTCAN programs/positions, as well as the absence of a corporate-level authority to monitor cost-effectiveness of these various programs/positions. A draft report was produced and recommendations from that report (e.g., place command and control under Deputy Chief of the Defence Staff (DCDS)²; create a corporate authority under VCDS to review positions on a regular basis, etc.) are yet to be officially approved at time of writing. CRS concurs with the VCDS report, and a previous 2004 report authored through CDLS(W), that changes need to be made to the governance structure of OUTCAN programs. We believe that many exchange positions have been allowed to continue for years without an adequate identification of CF needs and a strategy for linking these exchanges to current CF priorities. As well, the current structure of allotting positions according to historical L1 allocations is no longer relevant to CF needs and priorities.

Accountability. Currently, CDLS (L) and CDLS (W) play an important, yet unofficial, role in managing exchange and liaison assignments and performance. It is recognized that CDLS organizations have a vested interest in the information provided by exchange and liaison personnel with respect to their official defence relations role. Nevertheless, they are not the reason for the exchanges/liaisons, nor can they reap the full benefit of the knowledge/experience assimilated from these jobs. Sponsor organizations need to become more accountable for the positions they sponsor, and accountable for the results of program delivery.

The CF does not adequately use/share information from exchange and liaison positions, especially horizontally across the organization. Information is not well disseminated within sponsor organizations, let alone across the CF. There are limited built-in mechanisms to ensure that all potential beneficiaries of the information (e.g., DCDS and the Environments for interoperability, intelligence and training information; policy organizations for defence relations information; Chief Military Personnel (CMP)³ for career/professional development information, and Assistant Deputy Minister (Materiel) (ADM(Mat)) for equipment evaluation and procurement information) have access to the information.

Mandates of Other OUTCAN Programs. We have noted that some of the OUTCAN programs, like the CF detachment at the United States Navy (USN) Whidbey Island, and the Canadian Forces Information Operations Group (CFIOG) detachments embedded in the National Security Agency (NSA), are established under various training agreements with the US. Given that these are “one-way” exchanges of CF personnel embedded into specific operational requirements that are carried out on a recurring basis, we question whether these programs should, in effect, be authorized/mandated under military-to-military agreements, or would they be more adequately authorized under country-to-country North American collective security agreements.

² DCDS was stood down February 2006. Strategic Joint Staff (SJS) has assumed this responsibility.

³ Formerly Assistant Deputy Minister (Human Resources – Military).



Alternatives. The EALP is thought to be inflexible and untimely in responding to current or urgent needs. It takes a considerable amount of time to establish exchange positions. Some of the reasons for delays are related to country-to-country negotiations in the identification of one-for-one exchanges. Often, either the exchange that the CF sends, or the foreign officer it receives, is critical to the “raison-d’être” for the exchange, but not both. Flexibility needs to be built into the system to create, timely, one-way exchanges/secondments in accordance with CF need.

Revitalizing the Programs. Career managers are encountering difficulties in filling OUTCAN positions. Some of the reasons are: members feeling positions are hardship postings, members feeling positions are outside their career progression stream and visibility, reports from exchange officers that they do not feel useful/listened to, and members’ responsibility to dependants, etc. There is a need to re-build the profile of the EALP, including administrative support to OUTCAN personnel before and during the posting.

Management Action Plan

Ser.	CRS Recommendation	OPI	Management Action	Target Completion Date
1	a. Assess current CF needs (e.g., interoperability, foreign diplomacy, domestic liaison, training, etc.), knowledge gaps, and opportunities.	VCDS	Agree. The strategic objectives and needs of the CF, as well as those specific objectives and needs of the L1s, will be assessed, gaps will be prioritized and strategies developed.	TBD
	b. Identify strategies for targeting other allied militaries, government departments and non-governmental organizations in accordance with CF priorities and the use of exchange and liaison personnel.	VCDS	Same as above.	TBD
2	a. Combine CFAO 10-4 and ADM (Per) 3/93 into one re-developed Defence Administrative Order and Directive (DAOD). Establish controls over the creation of exchange and liaison positions.	CMP, VCDS	Agree. It is envisaged that the various governance documents for the many OUTCAN programs in existence will be harmonized into a single DAOD series. Liaison with the various stakeholders to seek their endorsement for this initiative will be necessary.	TBD



Ser.	CRS Recommendation	OPI	Management Action	Target Completion Date
	b. Determine corporate authorities for the Program, including resource allocation.	VCDS	Agree. Harmonization of the numerous programs and clear determination of authorities, responsibilities and accountabilities will be confirmed.	TBD
	c. Create a CF corporate oversight committee to provide direction to, and monitor program performance.	VCDS	Agree. The COS VCDS will have overall authority and control over all OUTCAN programs and will be able to establish the appropriate corporate oversight to ensure CF objectives, as well as program objectives, are met. The specifics of how this oversight will be achieved will be developed and communicated to all the stakeholders in due time.	TBD
3	a. Assess all existing CF exchange, liaison and similar programs and positions for continued relevance against a set of standardized criteria.	VCDS	Agree. It is expected that a strategic “zero-based” review of all OUTCAN positions in existence will be conducted and all positions justified and prioritized. This will be done with the input of all the appropriate stakeholders.	TBD
	b. Explore the feasibility of merging the multiplicity of programs/positions into a single program and report the results to the corporate oversight committee.	VCDS	Agree. See response at 2b above.	TBD
	c. Revise EALP L1 allocations based on need.	VCDS	Partly agree. The prioritization of all the OUTCAN positions will undoubtedly take into consideration the CF strategic objectives and needs, as well as those of the L1s. Specific allocation of positions by L1s, or by program, for that matter, may not achieve the desired outcome. An appropriate prioritization framework will be developed with the stakeholders.	TBD
	d. Consider creating a corporate allocation to provide the flexibility to quickly respond to urgent CF needs.	VCDS	Partly agree. See response above.	TBD



Ser.	CRS Recommendation	OPI	Management Action	Target Completion Date
4	Review the mandate and objectives of the Whidbey Island and CFIOG detachments to ensure their objectives reflect the work, and they are properly authorized and approved by the appropriate Canadian government or CF level.	CMS, ADM (IM), JAG	Agree. See responses 3a and 3c above.	TBD
5	Approve and implement the Performance Measurement Strategy developed in this evaluation.	VCDS	Partly agree. It is likely that the proposed Performance Measurement Strategy will form a significant part of the final strategy. Other issues may have to be considered in the analysis that will impact upon this strategy.	TBD
6	Improve Program effectiveness by: a. Identifying post-tour employment on return to Canada prior to foreign posting.	L1 Sponsor		TBD
	b. Exploring the feasibility of developing country-to-country standardized agreements, particularly with the US, on access to information while on foreign postings.	VCDS	Agree. All venues will be pursued with JAG and the stakeholders to standardize the process as well as the agreements so that CF objectives and needs are met.	TBD
	c. Developing a strategy to more effectively transfer the knowledge gained during exchange and liaison postings.	VCDS	Agree. The transfer of knowledge through reports and returns is essential. A communication strategy will be developed and the appropriate resources, and IT or otherwise, will be considered to enable the effective transfer of knowledge.	TBD
	d. Consider creating asymmetric positions when a specific CF need is not adequately met by an exchange or liaison position.	VCDS	Agree. See response 1a above.	TBD



Ser.	CRS Recommendation	OPI	Management Action	Target Completion Date
	e. Providing better support to OUTCAN personnel by creating a website that assists them at various phases of the posting. In particular, contributing to a better understanding of various financial entitlements, helping them plan for relocation, understanding job/terms of reference, helping family prepare for the posting and settlement, strengthening information exchange while on posting, command and control relationship, and providing one window for communications.	VCDS	Agree. Strategy and framework to be developed.	TBD



EVALUATION BACKGROUND

EVALUATION OBJECTIVES AND SCOPE

The purpose of the evaluation study is to provide the Department of National Defence (DND)/Canadian Forces (CF) senior management with information on the relevance, benefits and costs of various CF Outside Canada (OUTCAN) military Exchange and Liaison Programs (EALP).

Civilian exchanges were not included in the scope of this project, nor were military North Atlantic Treaty Organisation (NATO), North American Aerospace Defence (NORAD), Military Support Guard Unit (MSGU), Canadian Defence Attaché (CDA) Program, and Advanced Training List (ATL) postings.

The primary clients/users for this evaluation are expected to be:

- Vice Chief of the Defence Staff (VCDS) and Strategic Joint Staff (SJS), as the sponsors and Office of Primary Interest (OPI) for the EALP.
- All Level One (L1) organizations, as the sponsors of various exchange and liaison programs/postings.

EVALUATION APPROACH AND METHODOLOGY

- Survey questionnaires focusing on tangible benefits and meeting needs/requirements, including:
 - Survey of all members occupying liaison positions in November 2004, with response rate of 96 percent; and
 - Survey of all members who had occupied exchange positions between 2000–2004, with a response rate of 72 percent.
- Interviews with:
 - Sponsors/managers—benefits of exchanges and liaisons, process compliance;
 - L1 managers—long-term benefits from programs;
 - Managers of foreign exchange officers—impacts/benefits accrued from foreign exchange officer postings into Canada;
 - Career managers;
 - A sampling of L1s;
 - Liaison officers (LO) (approximately 30 percent of current LOs); and
 - Exchange officers (approximately 40 percent of former exchange officers).
- Documentation reviews of L1 processes, including needs analysis, qualifications, reports and monitoring.
- Data extractions from human resource and financial information systems.
- Logic models were developed with L1 representatives' assistance to facilitate the effective program planning, management and evaluation of the Exchange Program (Annex B) and the Liaison Program (Annex C).



EVALUATION CONTEXT

The context of the evaluation is discussed under the following headings: Objectives and Description of Various CF Exchange and Liaison Programs, Roles and Responsibilities, and Related CF Studies.

Objectives and Description of Various CF Exchange and Liaison Programs

- **CF Exchange and Liaison Programs Governed Under Canadian Forces Administrative Order (CFAO) 10-4:**
 - Principal CFAO 10-4 objective for exchanges is to maintain, augment, and extend the level of operational and technical knowledge and skills essential to the CF through the exchange of selected CF members with a foreign force or agency;
 - Secondary objective is to create an atmosphere of goodwill and a sense of cooperation between the CF and participating foreign forces;
 - There are 182 CF exchanges with other militaries through the EALP, governed by CFAO 10-4;
 - There are 26 CF exchanges under a Canadian Forces Information Operations Group (CFIOG) agreement with the United States Navy (USN) included in the EALP; and
 - Average length of exchange postings is 36 months, 47 percent are Major (Maj)/Lieutenant-Commander (LCdr), 30 percent Captain (Capt)/Lieutenant (Lt) and the member works directly for the host military.
- **Other Exchange Programs/Positions Not Currently Governed by CFAO 10-4:**
 - 24 CF one-way exchanges under a 1994 National Security Agency (NSA)/Communication Security Establishment (CSE)/DND Memorandum of Understanding (MOU) embedded with the NSA;
 - 37 CF one-way exchanges embedded at the USN Ocean Processing Facility (OPF) Whidbey Island performing operational duties under a DND/USN MOU objective of sharing oceanographic research experience, professional knowledge and doctrine;
 - Since there is no exchange in return to Canada, all 61 positions above can be viewed as part of Canada's contribution to North American security;
 - There is one other posting at United States (US) Reserve Command Headquarters; and
 - 4 one-way exchanges with the British and German armies, sponsored by CF School of Electrical and Mechanical Engineering (CFSEME). An MOU has been established to provide enhanced opportunity for field operational experience for electrical and mechanical engineering (EME) officers.

Numerous CF OUTCAN Programs operate under different governance structures and with different purposes.



- **Liaison Programs/Positions.** There are two levels of liaison—national and Environmental:
 - At the national level, Canadian Defence Liaison Staff (CDLS) and the CDA Program perform country-to-country liaison activities through their accreditation as diplomats, in addition to their defence relations objective;
 - At the Environmental level, CF members are approved, by specific foreign military organizations under the Liaison Program, to obtain and exchange information relating to tactics, equipment, training and research and development (R&D) in support of the America, British, Canada and Australia (ABCA) Standardization Program and other cooperative programs. LOs collect, analyze and disseminate specific types of information back to their CF sponsors, and are resident at the respective Foreign Military location. The benefits are related to passing real-time information related to operations, equipment, R&D, tactics, and interoperability;
 - Costs related to liaison positions are higher than exchange positions, as the CF covers office accommodation expenses;
 - There are approximately 26 LOs in the EALP governed by CFAO 10-4; and
 - LO rank levels tend to be higher than exchange, with 58 percent being at the rank of Maj/LCdr and 39 percent at Lieutenant-Colonel (LCol)/Commander (Cdr); the average length of a liaison posting is 39 months.
- **Other Liaison Programs Not Governed by CFAO 10-4:**
 - 12 members under an Assistant Deputy Minister (Materiel) (ADM(Mat))-sponsored bilateral US agreement/MOU (currently awaiting approval) for the Integrated Lines of Communication (ILOC) Program;
 - Seven military and three civilian personnel at the CF Logistics Liaison Unit (CFLLU), an ADM(Mat)-controlled CF unit;
 - 25 members with the Canada/US Bi-National Planning Group;
 - Seven with the CF Intelligence Liaison Program previously sponsored by the Deputy Chief of the Defence Staff (DCDS);
 - One position in the Medical Intelligence cell as part of the Armed Forces Medical Intelligence Centre, sponsored by the CF Health Services Group Headquarters (CF H Svcs Gp HQ) on behalf of Chief Military Personnel (CMP);
 - Two permanent positions with the Chief of the Land Staff (CLS)-sponsored ABCA Standardization Program as well as one Chief of Staff position, filled on a rotational basis, to be filled by Canada in 2005;
 - One Air Standardization position previously sponsored by DCDS; and
 - Several other liaison positions identified during the evaluation, including: one Capt (Navy) at US Commander in Chief Pacific (CINCPAC) Hawaii; one LCol LO at Central Command (CENTCOM); one Col Deputy Director at CENTCOM; one Col at US Naval Doctrine Command; one Major-General (MGen) LO at Northern Command (NORTHCOM); two NATO Sea Sparrow positions supporting equipment projects; three at the Canadian Space Agency in the US; one at US National Imagery and Mapping Agency (NIMA); one at Euro-NATO; one LO at Joint Headquarters United Kingdom (UK); and one at US Army War College.

- Not included in the scope of this evaluation are the following:
 - Canadian Defence Liaison Offices (Washington) (CDLS(W))—75 positions—and London (CDLS(L))—28 positions—were both sponsored by the DCDS. While these organizations manage bilateral defence relations at a strategic level, a considerable amount of resources and effort (e.g., military attachés/advisors) are involved in supporting the posted exchange and liaison staffs. These organizations have essentially two roles: planning, coordinating and conducting activities related to the Defence Relations Program Liaison between DND and US/UK militaries; and providing financial and administrative support to Canadian personnel in-country not supported through the Canadian Forces Support Units (CFSU) in Canada, Europe or Ottawa; and
 - The CDA Program, with 68 established positions located in 30 countries, performs liaison functions at a strategic, bilateral level.

Roles and Responsibilities for EALP

- **Program Sponsors**—L1s are responsible for justifying exchanges (e.g., determining requirements and benefits for each exchange or liaison position), developing position descriptions, assisting in selecting suitable candidates, briefing the candidates on the job, reviewing annual reports, and ensuring knowledge transfer on return to the CF. For liaison positions, the responsibilities are the same, and in addition there are ongoing taskings and communications with the sponsor.
- **L1 Coordinators**—Usually the L1 tasks one organization with coordinating the exchange and liaison positions it sponsors, including such duties as planning for, organizing and prioritizing the L1 positions.
- **Career Managers**—Career managers plan and execute the staffing of all exchange and liaison positions, as per sponsor position descriptions. A central database for EALP is maintained in CMP/Director Military Careers Administration and Resource Management (DMCARM). DMCARM plays an important role in coordinating and arranging documentation and postings with host countries. They respond to sponsor management of the positions.
- **CDLS(W) and CDLS(L)**—Officially, CDLS offices (and CDAs to a more limited extent) play an important role in program administration and supervision. Unofficially, they play a much larger role by planning and monitoring exchange and liaison personnel, including regular information exchanges. The CDLS Military Advisors provide an important link between the sponsors, the exchange/liaison personnel and the foreign militaries, as well as command and control (C2) of the EALP personnel.
- **CF Support Units**—Various CF support units provide administrative support to the OUTCAN personnel on exchanges and liaisons.

Related CF Exchange and Liaison Studies and Background

- **Chief Review Services previously conducted an evaluation of the EALP in 1987.** Main findings were:
 - Exchange and liaison programs were being conducted within regulations and provide good value for resources used;
 - Assessment of value is difficult to quantify, but not to recognize;



- The primary indicator of value—use of individuals upon return to Canada—has not reached its full potential due to the lack of advance planning and manning restrictions/constrictions;
 - Secondary indicators of value—useful reports/information being produced—the use of foreign members in Canadian posts is considered highly valuable, and commanders greatly appreciate the personal development achieved on exchange posts;
 - Lasting personal contacts have long-term benefit to the CF; and
 - Tendency is to let the program run itself, with some sponsors doing only the minimum to prepare members and fully utilize them on return to Canada.
- **August 2003—VCDS directs review** of all programs and initiatives involving the posting of personnel on exchange, liaison or training duties outside Canada, excluding DCDS deployed operations, NATO, NORAD, and Attaché Programs.
- **April 2004 CDLS(W) reports on review of 601 OUTCAN staff in United States.** Key findings were:
- CFAO 10-4 is outdated;
 - There is no consistent approach from L1s in managing the EALP;
 - Each of the OUTCAN Programs has a separate management framework and administrative requirements which complicates C2 of CF members; and
 - There are inconsistent and insufficient processes in place to verify that the EALP positions are providing the desired benefit. Without such a performance tool, it is difficult to justify the significant resources dedicated to the EALP.
- **July 2004 draft report on OUTCAN Governance Review** addresses C2 and administrative support, but not program effectiveness issues. Key findings were:
- Lack of an official structure to support a largely decentralized system;
 - Lack of a strategic governance framework to deal with OUTCAN issues and problems;
 - Lack of detailed coordination between Establishment Change Requests and L1 Business Plans prevent the establishment of priorities with linkages to the Defence Plan;
 - No measurable return on investment, especially with EALP;
 - No coherent corporate process to determine the appropriate number of personnel engaged in OUTCAN duties; and
 - Lack of clear and identifiable C2 structure.

There have been several studies of the EALP—many having similar observations to those in this report.



EVALUATION RESULTS

The evaluation results are presented for the following major issue areas: Continued Relevance of Programs, Program Success, Cost-Effectiveness, Benchmarking, Program Governance, and Performance Measures.

CONTINUED RELEVANCE OF PROGRAMS

The following factors were considered in assessing the continued relevance of the Programs: To what extent are the objectives and mandate of the CF EALPs still relevant, and whether there is a legal basis for the Program.

Discussion

- OUTCAN EALPs contribute to three of the four 2005-2006 corporate priorities for Defence, as follows:
 - **The first priority**—adapts to the evolving security environment and enhances strategic relationships—is one of the cornerstone objectives of the EALPs. Various programs, including Exchange and Liaison, CFIOG, and Canadian Forces Intelligence Liaison Staff (CFILO) enhance the Defence intelligence capability. These programs, as well as CF contributions at the USN OPF, strengthen defence and security arrangements with the US. The majority of CF OUTCAN EALP personnel are dedicated to US postings, thus expanding and promoting strategic partnerships with our largest ally.
 - **The second priority**—transform and modernize the CF—is indirectly supported by members' gained knowledge about major allies' doctrine, tactics and equipment advances, which contribute to the CF's capability to interoperate effectively.
 - **The third priority**—develop and support a professional, effective, sustainable defence team—is supported by increasing the professional experiences of CF members on OUTCAN postings.
- The CF programs support Canada's 2005 International Policy Statement in several priority areas including the revitalization of Canada's North American Defence Partnership:
 - The defence portion of Canada's International Policy Statement states that the CF will improve coordination with other government departments and interoperability with allied forces, particularly the US, through smart investments in evolving technology and doctrinal concepts, training opportunities, and exchange and liaison programs.

EALPs are still relevant to the DND/CF, contributing to three of four corporate objectives.



- It is not obvious whether the mandates of the following two OUTCAN programs are appropriately reflected and approved:
 - A Canadian/US Navy MOU authorized the Canadian participation (co-manning) of the US Naval Facility at Whidbey Island, Washington State. The stated objective is to share oceanographic research experience, professional knowledge and doctrine of both services. While the objective may be correct as stated, the result may be larger in scope. Thus the type of agreement should be reviewed for accuracy. While this program appears to be similar to a bilateral country-to-country agreement like NORAD, the objectives and authorization for the Canadian participation at Whidbey Island are totally different.
 - CFIOG sponsors a detachment program under a NSA/DND/CSE MOU. Under this MOU, CF personnel are embedded within various NSA units, with the objective of providing worthwhile experience and training for CFIOG personnel. While we do not question the training and development value of these positions, this objective is likely secondary to Canada's commitment to fulfilling international obligations in this area. Similar to above, it is questionable whether these units should be authorized under training agreements, or be recognized as Canadian contributions to North American Bilateral Security Cooperative Programs.

Authorization under training agreements, of two CF detachments embedded in US military, should be revisited.

Recommendations

- The Chief of the Maritime Staff (CMS) should determine whether the Canadian participation at the USN OPF at Whidbey Island is properly authorized under a department-to-department training agreement, or whether it should be a country-to-country bilateral agreement.
- The Assistant Deputy Minister (Information Management) (ADM(IM)) should determine whether the Canadian participation at various NSA detachments are properly authorized under a department-to-department exchange agreement, or whether it should be a country-to-country bilateral agreement.

EALP PROGRAM SUCCESS

- Members were asked in the Exchange Officer Questionnaire to rank the top three reasons for their exchanges. The top three reasons stated were to: promote practical insight into foreign capabilities and experience, improve interoperability, and foster international partnerships.
- The top two reasons correspond, in essence, to the first Exchange Program objective, which is to *maintain, augment and extend the level of operational and technical knowledge and skills essential to the CF through the exchange of selected members with a foreign force.*
- The third top reason—to foster international partnerships—corresponds to the second objective of the Exchange Program, which is to *create an atmosphere of goodwill and a sense of cooperation between the CF and participating foreign forces.*



- LOs were requested, in a separate questionnaire, to briefly describe what they were tasked to do. Of the respondents, 46 percent replied with non-specific taskings, 27 percent noted the gathering and exchange of information, and 19 percent reported to foster relationships.
- The other 54 percent responded with more specific tasks:
 - improve/enhance interoperability (13 percent); SME force/doctrine development with the US (8 percent); R&D work (7 percent); and other (27 percent).
- Generally speaking, the above reasons correspond to the Liaison Program objective which is to *obtain and exchange information related to tactics, equipment and R&D in support of the ABCA Standardization Program and other cooperative programs*.
- Findings regarding the EALP successes are discussed within the following categories:
 - Determination of Needs; Selection of Personnel; Employment on Exchange and Liaison; Post-Tour Activities, and Annual Review.

Determination of Needs for EALP Positions

The objectives are to: maximize the value of each position, eliminate duplication, reduce gaps in capabilities and competencies, and improve support requirements.

- There is a lack of information with respect to strategic identification of CF requirements/information needs.
- Documentation of capability gaps that exchange or liaison positions address is not evident in the files.
- Sponsor justification forms are not routinely completed for each candidate position as required by CFAO 10-4.
- Although the majority (79 percent) of exchange officers who completed the survey indicated they believed that the needs of the sponsor were met, we noted in interviews that many did not know who their sponsor was, and many had never been in contact with the sponsor before, during or after the tour.
- 72 percent of the LOs responding to the survey indicated that they worked for CDLS(W) or CDLS(L) and not the CF sponsor/organization of the position; most did, however, identify a specific client at National Defence Headquarters (NDHQ) for their work.
- Link between the LO and the CDLS(W) and (L) staff is much stronger than that with their sponsor; however, CDLSs have no command authority over the LOs as their role is one of administrative support.
- Career managers fill EALP positions on a priority 1 basis, but the continued relevance of the position is based more on historical existence than a regular position needs assessment and prioritization to ensure CF strategic capability needs are met.
- MOUs exist for the majority of programs/positions; however, these are dated and primarily cover administrative details rather than specific employment scope.

Lack of information available about strategic CF requirements to be met by EALP positions.

LOs not always located in optimal locations to meet CF needs.



- MOUs, such as those for the ILOC, are in the process of being reviewed—this involves a lengthy process requiring several levels of approval.
- LOs commented on numerous commands/locations better suited to liaison positions than the ones they occupied.
- Position terms of reference (TORs) are normally available from the incumbent; some are outdated and need revision.
- Some sponsoring organizations are making efforts to improve determination of EALP positions.
- Of note—a few L1 organizations (e.g., CLS, Chief of the Air Staff (CAS)) have recently developed EALP committees to review and validate positions.

Historical existence often the reason for continuation of specific Exchange and Liaison positions.

Selection of Personnel

The objectives are to increase the likelihood of selecting the right person for the job, minimize host country support problems, and maximize employability of member upon return to CF.

- Selection process varies amongst groups/Environments—formal versus informal committees versus career manager's discretion:
 - Liaison survey results: 29 percent were selected via selection process, 21 percent—supervisor requested; 18 percent—career manager suggestion; 18 percent had background and experience; and 10 percent—member requested.
 - Generally nominations for EALP begin with the career manager based on a review of files, member's request and/or member's unit nomination; career managers, not sponsors, also play a major role in selection of the individual.
 - Updated MOUs and TORs are not readily available to career managers, but they review the annual EALP officer reports for comments regarding position requirements.
 - Minimal liaison is conducted with position sponsors/branch advisors until the Director Military Careers (D Mil C) staff put nominations forward.
 - Terms of service (TOS) not a stated criterion for selection.
 - Screening process not standardized and without a single accountable office; SJS, Director Compensation and Benefits Administration (DCBA), CMP (Health Services) all have input and different criteria; confusing situation sometimes causes ineligible personnel to be screened in for a position.
 - Career managers release screening message to member if successful, and career brief forwarded to host country through CDLS(W)/(L). Once host country accepts nominated individual, the career manager generates a posting message.
 - Extension beyond tour end date is reviewed by the career manager, Branch, CDLS and host country unit to ascertain need.

Selection process varies a good deal between groups and Environmental elements.



- Difficulty filling some positions—sometimes an incumbent is the only one within the required occupation/background who agrees to the posting.
- EALP has, for some elements, been used as an incentive or as a reward for long-term service (i.e., last posting).
- Difficult to find candidates for these postings as families less inclined to relocate, especially to another country.
- 95 percent of exchange officers indicated an awareness of the position qualification and experience requirements, and most indicated they met these criteria.
- Majority of exchange and liaison personnel did not receive a pre-posting briefing from their sponsor:
 - The incumbent primarily provided information regarding the position after contact from the selected candidate, and frequently, this was during the individual's house hunting trip;
 - LOs (77 percent) indicated that they were well prepared to do the job based on their own personal experience and background, although most reported that there was very little direction on specific work focus/tasking; and
 - Exchange officers (80 percent) indicated that they were aware of the specific capabilities/competencies that they were to acquire during the posting, because of briefings/turnovers received from incumbent and not from pre-posting sponsor briefings.

Employment on Exchange and Liaison

The objectives are to increase host nation awareness of capabilities to facilitate interoperability; increase access to tactical training and doctrinal information; increase access to additional resources; increase international exposure to Canadian competencies; increase opportunities for unique professional development; promote practical insights into foreign capabilities; maximize individual effectiveness of members; and foster international partnerships.

- Exchange officers (92 percent) commented that their posting contributed to meeting the objectives of the CF Exchange Program.
- 96 percent of LOs replied that they understood what they had been asked to do either very well or well.
- LOs (73 percent) understood the role but stated that there was a lack of focus on how to accomplish vague objectives.
- Top three suggestions offered by liaison members to improve their effectiveness were: better Canadian sponsor definition of information requirements, improved access to US information, and more technical computer support.
- In order to function effectively on a foreign posting, members require adequate support for themselves and their families.
- 76 percent of the members surveyed expressed satisfaction with the level of CF support received while outside Canada. For the 24 percent who were not satisfied, the main reasons included:
 - Time—difficulty accessing administrative support agencies due to time differences;
 - Space—geographical location of some positions made access to support units difficult;
 - Financial—some members reported being out of pocket for expenses, e.g., travel for medical/dental family-related treatments, accommodation, unavailability of spousal employment, etc.; and
 - CF support—concerns were focused on the lack of knowledge of support personnel regarding claims, move procedures, etc.



- 90 percent of respondents felt that their host organizations provided them with the necessary support to meet position objectives.
- 50 percent of LOs noted they did not receive accreditation before starting the job, contrary to the CFAO policy. In order to share information from the host agency, accreditation of the liaison member is essential—without this job effectiveness could be negatively impacted early in the position tenure.
- 44 percent of the members reported that policies or restrictions at the host organization negatively impacted their ability to contribute to the unit's mission. The vast majority identified access to classified information as the main issue.
- 52 percent said that they were asked to contact, perform, or report to the CF (in addition to the annual exchange reports) during the exchange posting, although the directive states that members are not to be used as a conduit of information on a regular basis.
- The required Annual Exchange Reports were submitted by only 87 percent of the members. Although 47 percent of exchange officers knew the sponsoring organization received a copy, 82 percent reported not receiving any feedback from the sponsor, giving the perception of a lack of interest in the job performed by the exchange officer.

Although most members felt they received necessary support from their host organization, 50 percent of LO respondents did not receive accreditation before starting, and 44 percent noted host policies or restrictions that had a negative impact on their ability to contribute.

Post-Tour Activities

The objectives are to validate the effectiveness of the program, justify the positions, improve employability, and minimize problems for the members upon return to Canada.

Validate Effectiveness/Benefits of Program

- Based on the original justification/purpose of the positions, the following are some examples of the benefits of the EALP:
 - Training through attendance at a variety of specific courses;
 - On-the-job relevant experience;
 - Knowledge gained to update CF doctrine;
 - Acquired knowledge of training materials and methods;
 - LO reports providing indications of advances and reducing redundant efforts; and
 - Identification of useful contacts for future information requests.
- Improvement in personal skills/professional knowledge were reported by the following percentage of exchange officers:
 - Operational skills/knowledge—93 percent;
 - Technical skills/knowledge—91 percent;

- On one posting a pilot obtained 1,500 hours of aircraft experience in 34 months and could then instruct and perform all aircraft capabilities.
- Another posting provided opportunities to participate in deployment ops including air-to-air refueling, ground refueling of other aircraft, airdrop and search and rescue.



- Strategic understanding—83 percent; and
- Doctrine development—77 percent.
- The impact on the CF of the knowledge gained from the postings was rated as high or extremely high by the following percentage of exchange officers, in the following areas:
 - Understanding of foreign military—77 percent;
 - Interoperability—64 percent;
 - Equipment understanding and operational development—53 percent;
 - Tactical development—45 percent;
 - Doctrine development—39 percent; and
 - Strategy development and R&D knowledge—36 percent.
- Transfer of knowledge, however, appears to be a concern; from interviews we noted that:
 - For the most part, knowledge is passed on informally;
 - There is a lack of developmental succession plans for exchange officers; and
 - Still, it is recognized that LOs benefit their sponsoring organizations while away, and any organizations that they will work with upon return.
- There is also an indication that Canadians are not always deploying with host units due to lack of approval from NDHQ and the Government of Canada. This reduces the effectiveness of the Exchange Program, as much is learned during operational deployments, and has the potential to impact on the CF/Canada's credibility with our allies.
- Another determinant of Program effectiveness is whether the location is optimal. As noted previously, especially for liaison positions, it was reported that better functional/geographic opportunities existed.

Overall, 78 percent rated the Exchange Programs very good to excellent in meeting the needs of the CF. Only 10 percent of exchange officers felt, however, that knowledge and experience gained was effectively transferred to the CF on return.

Justify the Positions

We found limited post-tour justification of positions by sponsors:

- Sponsors often did not see annual reports, although 87 percent of exchange officers reported having completed them;
- Questionnaires were not routinely completed, and returnees did not, routinely, brief sponsors; and
- On review of final reports we noted they often lacked an assessment of the value of specific exchange positions to the CF.
- CDLS (W) and (L) played a much larger role than sponsors in reviewing annual reports, discussing positions with incumbents and assessing the future worth of the position.

We found limited post-tour justification of positions by sponsors. E.g., sponsors often did not review annual reports, although 87 percent of exchange officers reported completing them.



Improve Employability of Returning Members

- Debriefing of exchange personnel upon return to Canada, completion of post-tour questionnaires and review of final reports should provide an opportunity for EALP officers to discuss their posting, thereby minimizing any problems encountered by the returning members.
- The process review conducted by the evaluation team found that the files did not contain evidence of a debriefing session, or the completion of a post-tour questionnaire.
- The CFAO states that upon tour completion, the member will normally be returned to a position where maximum benefits will be gained from the exchange experience.
- Based on our study, we found that the majority was not returned to a CF position that benefited from the exchange posting.
- For the initial posting after the exchange, only 34 percent responded affirmatively that they had been employed in a job that utilized their OUTCAN experience. Often, the reason given was that other priority posts needed to be filled first.
- Contrary to the above, 72 percent of members rated the initial position that they were posted to in terms of utilizing the experience and knowledge attained through the exchange as good to excellent.
- According to the survey results, only 28 percent of members were told before the exchange which position(s) they would likely be posted to after their return.
- For LOs, 82 percent of respondents did not have a position identified post-tour.
- 20 percent of exchange officers stated in an open-ended question that the Program would be improved if they knew in advance the type of position (organization) that they might be posted to upon completion of their tour.

Generally, sponsors have not complied with their responsibilities as set out in CFAO 10-4.

Annual Review Process

The objectives are to improve strategic guidance provided to the program, improve L1 guidance, ensure currency of guidance, policies, etc., and determine the appropriate number of positions and L1 allocations.

- CF and L1s have not identified CF strategies for the employment of exchange officers and LOs.
- No link is apparent between the EALP positions and the CF current needs/strategies.
- Governing policy CFAO 10-4 is outdated.
- Inconsistent approach by sponsors to responsibilities of determining CF needs and re-justifying position requirements and benefits.
- Based on process review of 10 percent of all EALP positions, we found that the majority of L1s are not making adequate use of available information (e.g., participant reports, CDLS input, sponsor reviews, etc.) to evaluate benefits of positions.
- In our opinion and according to the managers interviewed, the EALP has not kept abreast with the current CF strategies and priorities.

Missing linkage between EALP positions and current CF needs/strategies.



- Based on our analysis of exchange positions over the period 1994-2004, we found that 63 percent of the exchange positions had no change to their TORs in that time. Only 7 percent of the positions have been added in the past ten years:
 - 82 percent of the CF exchange positions in the UK had not significantly changed since the beginning of the Cold War.
 - With respect to the liaison positions, we noted that they have stayed essentially the same for the last 40 years, although there have been considerable changes to the foreign military structures to which they are attached:
 - E.g., although US military has undergone substantial organizational change in recent years, CF LO locations have not. For instance, legitimate requirements exist for a CF LO presence at US CENTCOM and NORTHCOM, with Joint Staff and with Special Forces.
 - Program is unable to respond in a timely manner to current requirements or new opportunities. We learned of numerous foregone EALP opportunities because of this.
 - Reasons for Program inflexibility include inflexible L1 position allocations and difficulties transferring between organizations, difficulties finding a corresponding exchange person from other militaries, position security requirements, and identification of an appropriate CF sponsor when positions are of horizontal CF benefit.
 - There are significant collateral benefits over and above the stated Program objectives, such as creating opportunities for collaboration, building country-to-country trust, establishing a Canadian presence, retaining members in interesting jobs, etc.; these benefits are not quantified or qualified.
- Based on our analysis of Exchange positions over a ten-year period, 63 percent had had no change to their TORs.
- Most LO positions have remained the same for the last 40 years.
- EALP is somewhat inflexible and often unable to take timely advantage of opportunities that arise.

Foreign Officers on Exchanges in the CF

- We did not find any Canadian strategy that related to specific CF needs for foreign military exchanges in Canada.
- We noted that, in some cases, the value and primacy of the exchange was measured more in what knowledge Canada received from the foreign exchange officer, than the anticipated benefits of the Canadian member's exchange in the foreign military.
- Refer to the section on page 16 for a discussion of alternatives for Program delivery.

Other CF OUTCAN Exchange and Liaison Programs

- We noted that the other exchange and liaison-type Programs (e.g., ILOC, CFIOG, CFLLU, CFILO, and Whidbey Island, etc.) had their own review processes established within their own governance structures and, for the most part, did a more thorough job of justifying requirements, identifying benefits and re-justifying/re-validating positions.



Recommendations

- Assess current CF information needs, knowledge gaps and opportunities, and identify strategies for targeting other allied militaries in accordance with CF priorities in association with the use of exchange and liaison personnel. The CF should establish guidance on CF knowledge and interoperability objectives.
- Assess all existing CF exchange and liaison programs and positions for continued relevance against a set of standardized criteria, and report the results to the corporate oversight committee. Revise EALP L1 allocations based on CF priorities/needs, rather than on historical L1 ceilings. Consideration should be given to establishing a “corporate” allocation from which positions that benefit the CF as a whole can be expeditiously authorized.
- Revise/rewrite position descriptions/TORS/MOUs and realign them with the CF strategic vision.
- Branch advisors and sponsors identify candidates through a succession planning process and advise potential candidates early in their career of a future requirement to fill an EALP position as a possible benefit to rank progression. Collaboration amongst career managers, sponsors and commanding officers should be enhanced.
- Improve administrative support to EALPs, especially advance briefings on member entitlements on exchange, assistance in moving, and who can be contacted for support in country. Create an OUTCAN website for administrative/financial/family support matters.

COST-EFFECTIVENESS

- While the cost of the EALP or investment is relatively easy to identify, the benefits or returns are more difficult to capture and many are longer term.
- The EALP process design includes benefits reporting, but this has not been used; as a result, there is a lack of verifiable data regarding Program benefits.
- Evaluators interviewed members on exchange, sponsors, beneficiaries, and L1s and, without exception, all believed the Program to be worth the incremental costs of approximately \$95K annually per person involved in the EALP.
- The Program contributes to many objectives, including interoperability, changes to doctrine/training, defence relations, personnel development, and retention of officers.
- In terms of meeting the needs of the CF, 78 percent of respondents rated the Exchange Program as very good or excellent. Despite this relatively high rating, 42 percent of members identified the need to make improvements in the Program. Improvements were suggested by members in the following areas:
 - Sponsor management (41 percent);
 - Career management and succession planning (20 percent); and
 - Member and family support (14 percent).

It is difficult to quantify program benefits because of their nature—i.e., increased interoperability, changes to doctrine/training, defence relations, personnel development, and retention of officers, etc.



- Our conclusion is that the Program is not operating to its optimum effectiveness and there are a number of improvements that could be made.
- In reaching this conclusion, some notional indicators of Program effectiveness that were examined included the:
 - Extent existing Program/process controls are being used;
 - Existence of more cost-effective ways of delivering the Program;
 - Extent of duplication or overlap;
 - Determination of needs that prompted the specific positions; and
 - Consideration of the performance factors that the EALP sought to improve.

We conclude that the program is not operating optimally and that much can be done to improve Program effectiveness.

To What Extent Are Existing Process Controls Being Used?

- A lack of compliance with the following process criteria (outlined in CFAO 10-4) diminishes the effectiveness of the Programs:
 - Strategic guidance available on high-level CF requirements/information needs and targeted areas;
 - Evidence that a position needs assessment has been done, reviewed and prioritized;
 - Linkage between L1 requirements and how the respective exchange/liaison will fulfill the capability/information gap;
 - Sponsor preparation and briefing before departure;
 - Debriefing and reporting upon return;
 - Post-tour employment in a job related to the skill/knowledge acquired by the member;
 - Evidence of knowledge transfer; and
 - Review of documentation for justification of EALPs.
- It was found during our evaluation that most L1 sponsoring organizations are not following many of the existing process controls in place, although many recognize that additional attention to these programs is warranted.

Non-compliance with some existing controls has effect of diminishing Program effectiveness.

Are there more Cost-effective Alternatives to Deliver the Program?

- Program stakeholders, both sponsors and participants, believed that there are limited alternatives available to accomplish the objectives of the EALP. In reviewing the positions, we noted that:
 - A considerable number of exchange positions perform both exchange and liaison-type duties. In some cases, the exchange agreement may be put at risk by exchange officers providing information/coordination of information to Canadian authorities;
 - The value/benefits of the exchange are often not equal for the two militaries involved;
 - It is frequently difficult to quickly respond to exchange opportunities when both sides of the exchange have to be filled; and



- Those involved in the EALP believed that 4-6 month temporary postings, similar to the Australian and UK Long-Look Programs, provided another model.
- In our opinion:
 - There is substantial evidence to support the creation of one-way positions that do not comply with the requirements of either exchange or liaison positions;
 - There are a growing number of one-way postings that can benefit Canada, either because a pressing opportunity is identified for a CF member with an important ally or because there is an opportunity to take advantage of a foreign military member's experience and knowledge within the CF; and
 - The CF should not miss out on important foreign opportunities to share and transfer knowledge because a return exchange cannot be quickly arranged.

The option of creating one-way exchange positions to respond to CF operational needs and opportunities in a timely fashion should be considered.

Extent of Duplication or Overlap

- In order for the Program to operate in a cost-effective manner, duplication/overlap between positions should be eliminated. Monitoring the continuing value of each position using established criteria best achieves this. One of the indicators of the proposed Performance Measurement Strategy (see Table 3) is that 100 percent of positions meet the criteria established for the justification of exchange and liaison positions and that L1 coordinators be assigned responsibility for monitoring this indicator on an annual basis.
- Currently, the CLS and, to some extent, the CAS engage in this activity. The CLS organization was the most advanced in re-designing its exchange and liaison programs in terms of determining needs, selecting personnel, conducting reviews/re-validation and governance. The CLS reviews the EALP as one part of their International/OUTCAN Program, thereby being able to reduce any possible duplication efforts, and prioritize all OUTCAN programs/positions (e.g., including NATO, NORAD, ATL, etc.). We consider their evolving efforts to be a model for other L1s to follow and have highlighted the Land Forces International Program at Annex D.

Determination of Needs for Specific Positions

- It is difficult to determine the appropriate number of exchange/liaison positions due to the lack of adequate measures and the often long-term, subjective nature of the benefits; however, at least 10 percent of positions have existed since before 1970, with a few dating back to 1948. This is a conservative estimate because for many positions, the records do not indicate the date that they were created.
- To maximize the value of each position, it is essential that it exist to meet a determined need. This can best be accomplished by ensuring that:



- Sponsor justification forms include a plan to meet the capability/information gap identified; and
- Position descriptions specify requirements.
- The L1 coordinators should review both of these tools every three years at least, one year prior to the end of the tour.

Program Costs (Per Year)

- In 1997, in conjunction with the devolution of Program oversight, VCDS authorized a baseline allocation of exchange and liaison positions to each L1. While these positions continue to be funded centrally out of the corporate account, this also allowed L1s the flexibility to exceed their baselines if needed. Exchange and liaison positions have been assigned a fixed incremental cost of \$67,127, representing the average yearly expenditures for out-of-country allowances and benefits—actual expenditures may be higher or lower, depending on factors such as location and accompanying dependents. An L1 that exceeds its position allocation must identify the source of funding and transfer the incremental cost of additional positions to the corporate account.
- **Fixed Costs for EALP:**
 - Salaries for 208 currently staffed = \$18,044,832
 - L1 Program oversight/coordination = \$363,435
 - DMCARM = \$118,719
 - EALP Program support and administration = \$916,396
 - **Total fixed costs** = **\$19,399,702**
- **Incremental Costs for EALP:**
 - Various allowances/premiums /expenses paid to members = \$67,127 per person
 - Cost moves = \$28,050 per person
 - Total incremental cost per person = \$95,177
 - Total incremental cost for 208 currently staffed EALP = **\$19,796,816**
 - **Total cost of EALP** = **\$39,196,518**
- **Fixed Costs for Programs Outside of EALP:**
 - Salaries for 137 non-EALP positions = **\$11,329,956**
- **Incremental Costs for Programs Outside the EALP:**
 - Whidbey Island—36 members = \$3,426,372
 - CFIOG/NSA—24 members = \$2,284,248
 - ILOC—14 members = \$1,332,478
 - CFLLU—7 members = \$666,239



○ CFILO—8 members	= \$761,416
○ Binational planning—25 members	= \$2,379,425
○ Other “like” positions that fall outside EALP—23 positions	= \$2,189,071
○ Total incremental cost for 137 positions outside EALP	= \$13,039,249
○ Total cost of programs outside EALP	= \$24,369,205
▪ Full Cost: (O&M not included)	= \$63,565,723

Recommendations

- Consider the creation of positions that do not fit neatly into exchange or liaison position definitions, but meet an immediate CF need, and manage them under the auspices of the EALP.
- Investigate short-term postings, similar to the Long-Look Program.

BENCHMARKING WITH OTHER MILITARIES

- Benchmarking was done to provide a comparison with similar programs in other militaries.
- Other militaries have policies similar in design to the CF EALP.
- No other militaries reviewed had any specific performance measures established for their equivalent programs.
- Many militaries were in the process of reviewing their programs, assessing benefits and re-targeting locations of their personnel according to re-defined priorities associated with their defence relations/diplomacy strategies.
- See Table 1 for a comparison of the number of exchange positions to the size of the Regular Force between Canada and other countries.



Table 1—Canadian Exchanges Compared to Select Militaries (2004)

Country	Regular Force	# Exchange Positions	% of Regular Force
Canada	62,012	182 (EALP only)	.29
UK			
Royal Navy (RN)	40,000	124	.31
British Army	100,000	92	.09
Royal Air Force (RAF)	50,000	122	.24
US			
US Navy	370,000	193	.05

CF GOVERNANCE STRUCTURES AND RESOURCES

- Before 1997 a corporate committee annually reviewed and validated all EALP positions.
- In 1997, the committee dissolved; L1s were made responsible for reviewing and validating their own positions.
- CMS, CAS, CLS, DCDS, and ADM(IM) have designated OPIs to coordinate their exchange and liaison programs.
- For CAS, and CLS, a committee at the Director level is established to validate the EALP positions.
- Other L1s, including ADM(Mat), CMP, Assistant Deputy Minister (Infrastructure and Environment) (ADM(IE)) and VCDS, do not have one coordinator; instead individual DGs or Directors manage the EALP positions, plus other similar exchange and liaison positions.
- CFAO 10-4 outlines sponsors' responsibilities for identifying CF requirements, prioritizing positions, arranging support, monitoring on posting, reviewing annual exchange reports, and re-validating position requirements for the next cycle. A central database for EALP is maintained in CMP/DMCARM.
- DMCARM has no official management responsibilities but plays important role in coordinating and arranging documentation and postings with host countries. Reliance is on sponsors for ensuring TORs current and appropriate personnel selected.
- CDLS (W) and (L) have no official governance responsibility, but in practice have more impact on EALP management than official sponsors.
- Recent CDLS (W) and VCDS OUTCAN studies commented on lack of corporate governance related to CF OUTCAN programs.



Other CF OUTCAN Exchange/Liaison Programs. Other programs have different governance structures than the EALP. Each program has some form of bilateral MOU, usually signed at the DG/Director level and managed within the program being administered:

- NDHQ Instruction ADM(Per) 3/93 entitled “Policy and Staffing Procedures for the Attachment, Secondment or Loan of CF Personnel” has identical program objectives as the EALP. It allows ADM(Per) (now CMP), on behalf of the Chief of the Defence Staff (CDS), to approve OUTCAN secondments, loans and attachments up to four years.
- There is currently no effective position control over exchange and liaison positions created. This allows the creation of programs and positions outside the EALP.
- There are several geographical locations where there are a number of CF personnel responding to various DND exchange and liaison programs and requirements.
- Visibility of the overall size and efficiency of the exchange and liaison efforts is difficult because of the numerous agreements/MOUs in effect.
- Opportunity exists to create more efficiency, critical mass, and program flexibility by combining all exchange and liaison positions under one governance structure.
- L1 exchange ceilings have been based more on historical allocations than on CF requirements. We have found no rational basis for these allocations, which have remained in essentially the same proportion since the EALP began in 1950s.
- For liaison positions, in 1986 there were 25 liaison positions as part of the EALP. In 2005, there are 26.
- Table 2 shows allocations in 1987, 1997 and 2005.

Various instructions allow for the approval of exchange and liaison programs and positions.

L1 exchange ceilings have been based more on historical allocations than on CF requirements.

Table 2—Comparison of L1 Exchange Allocations

	1987	1997	2005
Maritime Command (MARCOM)/CMS	32	28	28
Land Force Command (LFC)/CLS	30	32	19
Air Command (AIRCOM)/CAS	56	49	52
ADM(Mat)	40	26	25
DCDS	15	15	10
ADM(Per)/Mil (now CMP)	13	10	12
ADM (Defence Information Services)/Information Management (IM)	-	8	33*
ADM(IE)	-	-	2
VCDS	-	-	1
TOTAL	186	168	182

* Includes CFIOG exchanges.



Recommendations

- Consider combining all exchange and liaison programs/positions into one corporate program to ensure better corporate direction, oversight, efficiency and visibility. Combine CFAO 10-4 and ADM(Per) 3/93 into one DAOD.
- Re-establish a DND corporate oversight committee for all OUTCAN positions, including both exchange and liaison.
- Allocate positions to L1s based on current CF requirements and established need.
- Consider the creation of a number of corporate positions to provide the flexibility to quickly respond to short-term urgent priorities.

PERFORMANCE MEASURES

- While the development of performance measures for the EALP was outside the scope of the evaluation study, it was agreed by an Evaluation Advisory Committee composed of staff from CRS and the major stakeholders to develop a strategy to provide relevant information for the ongoing monitoring and management of the Program. Through the implementation of this strategy, the value of the Program can be more effectively demonstrated to senior management.
- Key performance issues identified include:
 - Determination of need;
 - Selection of personnel;
 - Employment on exchange/liaison tours;
 - Post-tour activities; and
 - CF and L1 annual/review process.
- For each performance issue the associated indicators/measures and performance targets are identified (see Table 3).

Recommendation

- The CF adopts the draft Performance Measurement Strategy, including L1 implementation provided as part of this evaluation report.



Table 3—Draft EALP Performance Measurement Strategy

LOGIC MODEL COMPONENT	MEASURE	INFORMATION SOURCE	FREQUENCY OF REPORTING	RESPONSIBILITY	REMARKS
Determination of Need	100% of sponsor justification forms include a plan for how the exchange/ liaison position will meet the capability/information gap.	Sponsor justification forms.	Every 3 years; 1 year prior to end of tour.	L1 coordinators.	Maximize value of each position.
	100% of position descriptions specify requirements (qualifications and experience).	Position descriptions.	Every 3 years; 1 year prior to end of tour.	L1 coordinators.	
Selection of Personnel	100% of members selected for exchange/liaison positions meet the identified requirements (qualifications and experience) and TOS.	Sponsor justification forms and position descriptions; sponsors, Branch advisors, commanding officers/supervisors, career manager input.	Annual—all new postings during current fiscal year.	L1 coordinators in consultation with career managers and sponsors.	Increase likelihood of right person in the right place at the right time.
Employment on Exchange Canadian and Foreign Members	100% of annual reports affirm information critical to Canadian areas of interest was obtained.	Annual reports.	Annual.	Sponsors and L1 coordinators.	Increase access to tactical, operational and doctrinal training and information.
	100% of sponsors provide feedback on the contents of the annual reports.	Acknowledgment of receipt of reports.	Annual.	Sponsors and L1 coordinators.	
Post-tour Activities	100% of exchange personnel complete a post-tour questionnaire upon return to Canada.	Completion of post-tour questionnaire by member, sponsor and host nation.	Every 3 years; post-tour.	Member and L1 coordinators.	Validate effectiveness of the Program.
	100% of members have post-exchange employment directly related to the exchange (unless selected for command position, ATL or Second Language Training).	Sponsor justification form and review of post-tour posting.	Every 3 years; post-tour.	L1 coordinators in consultation with career managers.	Improve employability of returning members.
Annual/Review Process L1 and CF Level	100% of positions meet criteria established for the justification of exchange and liaison positions.	Criteria for justification of exchange/liaison positions, CF functional priorities and CDS geographical priorities.	Annual.	L1 coordinators.	Improve strategic guidance provided to the Program.



ANNEX A—SUMMARY OF CF OUTCAN EXCHANGE AND LIAISON PERSONNEL BY PROGRAM AND COUNTRY

Program	US	UK	Australia	Germany	NZ	France	Hungary	NL	BE	Total
EALP										
- Exchange	108	54	9	3	1	4		2	1	182
- Liaison	26	0	0	0	0	0		0	0	26
In Addition to EALP Program										
ADM(IM) Sponsor										
CFIOG/NSA	24									24
CMS Sponsor										
Whidbey Island	36									36
MARPAC Det/CINCPAC	1									1
US Naval Doc C	1									1
ADM(Mat) Sponsor										
CFSEME		1		3						4
ILOC	9	1		2			1	1		14
CFLU	7									7
NATO Seasparrow	1									1



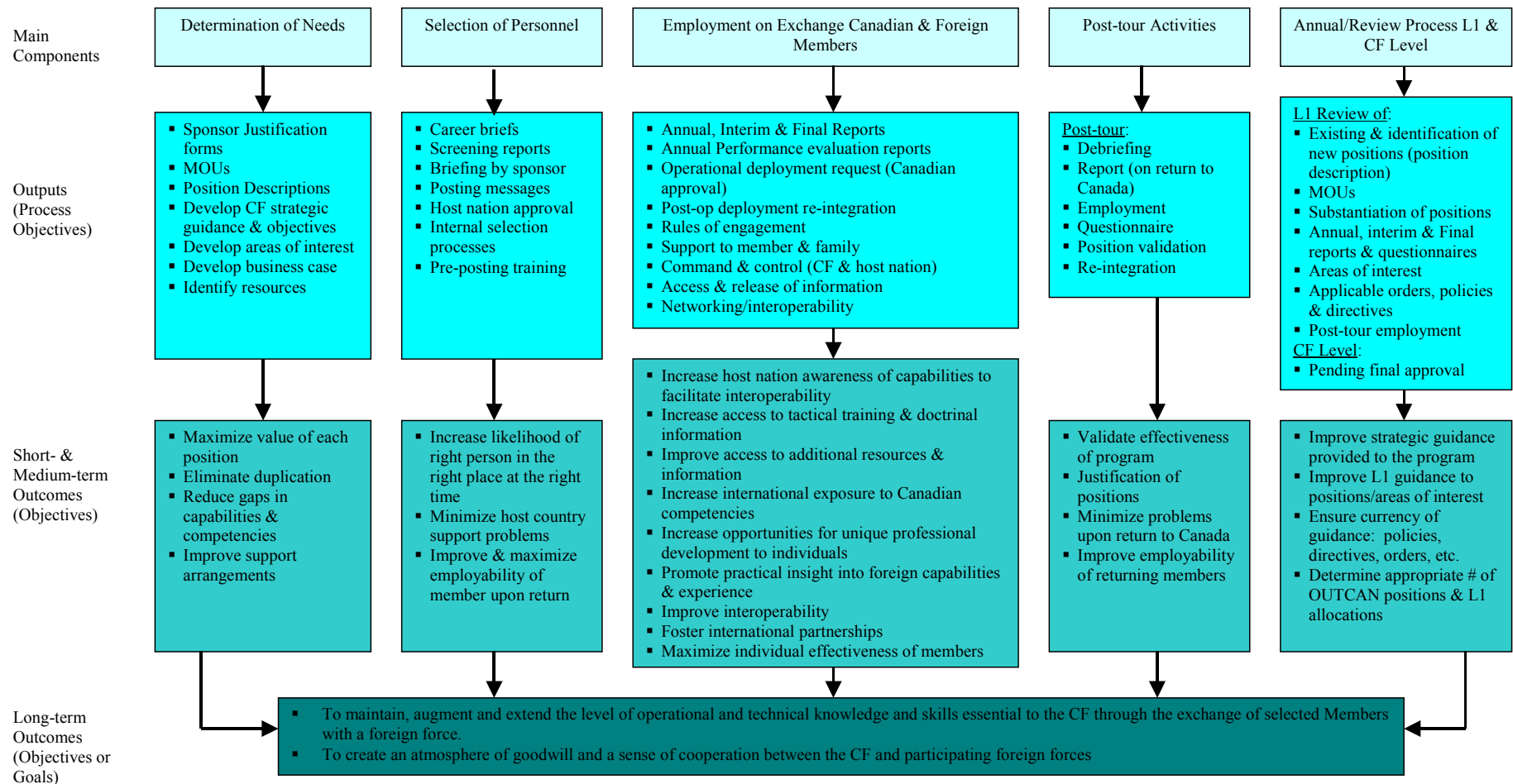
ANNEX A

**SUMMARY OF CF OUTCAN
EXCHANGE AND LIAISON PERSONNEL BY PROGRAM AND COUNTRY (cont'd)**

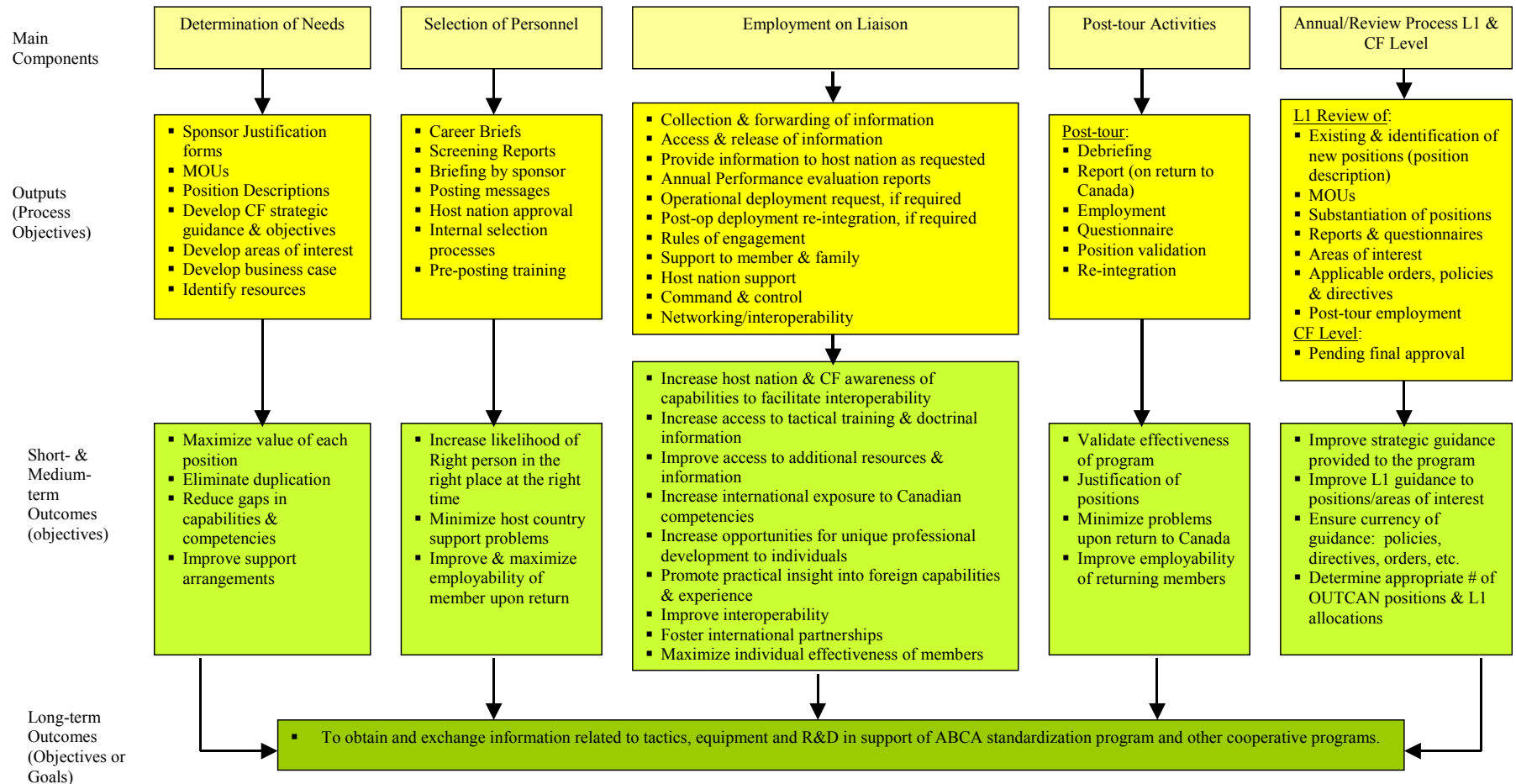
Program	U.S.	UK	Australia	Germany	NZ	France	Hungary	NL	BE	Total
VCDS										
Bi-National Planning Group (NORAD related)	25									25
CFILO	7	1								8
CSA	2			1						3
PESCAA	1									1
Air Standardization	1									1
NIMA	1									1
CENTCOM LO	1									1
CENTCOM Dep Dir	1									1
NORTHCOM LO	1									1
JHQUK		1								1
CAS Sponsor										
Euro-NATO	1									1
CLS Sponsor										
US Army Reserve Command HQ	1									1
ABCA Standardization	2									2
US Army War College	1									1
CMP										
QMIC	1									1
TOTAL	259	58	9	9	1	4	1	3	1	345



ANNEX B—EXCHANGE PROGRAM LOGIC MODEL



ANNEX C—LIAISON PROGRAM LOGIC MODEL



ANNEX D—LAND FORCE INTERNATIONAL PROGRAM

Land Force International Program (based on LFIP 30-11)

The Land Staff (LS) have established a Program of external international partnerships that have assisted the Land Force (LF) in achieving its strategic change objectives. To bring justification, credibility and validity to this International Program (IP), the Land Force International Program (LFIP):

- Monitors the entire army IP process, from selection of participants, conference and/or collective training activities to providing strategic direction/tasks for the collection of pertinent information through to the post-tour employment planning for LFIP personnel;
- Provides LS with lessons learned on doctrinal, operational and tactical experiences on various topics and levels of command from larger allied armies; and
- LFIP cycle model details the annual LFIP sequence of activities, giving focus to the LS to ensure that the LFIP is a high quality, relevant, accurate and timely information resource.

LFIP includes:

- LF EALP; LF Standardization Program, international collective training and professional development, international conferences, and other OUTCAN postings;
- Managed on behalf of the CLS by the LFIP Working Group (LFIP WG);
- WG ensures that the LFIP maintains a cost effective and prioritized program that:
 - Strengthens interoperability with allies;
 - Facilitates sharing of concepts, technology and expertise not available in Canada;
 - Provides access to essential experience opportunities not available in Canada; and
 - Increases the international visibility and reputation of the Canadian army, and contributes to broader CF and governmental strategies and geo-political objectives.

Functional priorities categorized as:

- Material and doctrinal development; higher-level headquarters expertise and combat function expertise .
- Interoperability priorities encompassing:
 - United States, ABCA nationals, NATO, and other geographical areas provide the basis to identify the information and expertise that are not available but required to support the LF mission.



ANNEX D

Process:

- The Army Combat Development Board with input from the Director General Land Capability Development (DGLCD), sponsors, Canadian Forces Military Attaché (CFMA), and the Land Force Doctrine and Training System (LFDTTS) provides overall strategic guidance for LF areas of interest for the exchange officers. For the liaison officers, the Army Combat Development Board with the CLS's Strategic Planning Session provides guidance to CFMA on concerns/focus areas for all International Program participants. The CDLS(W) has established a web-based tasking directive that is updated on a regular basis throughout the year.
- Direction is provided on the selection of personnel, sponsor responsibilities, report requirements, and follow up and the recommended post-tour postings for each LFIP position.
- Validation of the EALP positions occurs, annually, at the LFIP WG meeting. Each position is validated against pre-set criteria:
 - Meets the Program objectives;
 - Desired knowledge or skill can best be obtained through the EALP;
 - EALP supports long-term aims of CF;
 - Position meets purpose for which it was originally established;
 - Foreign force or agency remains the best means to obtain the desired results; and
 - Access to information desired (access of information is not a constraint in meeting the EALP objectives, gaining value from the work).
- The implementation and continuous monitoring of the LFIP continues to evolve as needs change. However, progress is apparent and efforts are focused in the right direction. As a start, the LFIP could serve as a model for other environments/organizations to facilitate the oversight of their EALP and/or international programs.

