



Whole of Government Training for the Comprehensive Approach to Operations

*A Survey of the Final Planning Conference for Exercise FRONTIER
SENTINEL 2012*

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In conducting the research described in this report, the investigators adhered to the policies and procedures set out in the *Tri-Council Policy Statement: Ethical conduct for research involving humans* (2010) as issued jointly by the Canadian Institutes of Health Research, the Natural Sciences and Engineering Research Council of Canada and the Social Sciences and Humanities Research Council of Canada.

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Abstract

This study investigated participant evaluations of the Final Planning Conference (FPC) for Exercise FRONTIER SENTINEL 2012 (EX FS12), one of a series of planning meetings that was held in preparation for EX FS12 proper, a “Whole-of-Government” (WoG) or interagency exercise, in order to provide opportunities for partners and stakeholders to consult with one another in the development of exercise plans. The present study was designed to contribute to the Lessons Learned (LL) process for this FPC and to enhance the exercise planning process. Twenty-one participants (11 civilians representing Canadian government agencies/departments and 10 military personnel, including seven from the Canadian Armed Forces and three from the United States military) completed a survey that assessed perceptions of the FPC in terms of opportunities afforded for information sharing, planning, coordination, and collaboration. Results indicated that the vast majority of participants, both civilian and military, felt that they were well prepared for the FPC and that the FPC was a success. Most felt that information sharing was adequate and that ideas were exchanged freely; most agreed that the planning processes of the military and civilian organizations were compatible and that participants were able to develop a common and unified approach to mission planning; and all agreed, to some extent, that the FPC took into account their respective organization’s procedures, goals and objectives, values, mandates or roles, and communication style. In describing the extent of their organization’s collaboration within the WoG team, most participants chose the term “coordinated,” whereas a few participants chose the term “cooperated,” “integrated,” or “informed.” However, in some areas, military participants’ assessments were slightly more positive than those of civilian participants (e.g., military participants were significantly more likely than civilian participants to report that their expertise and experience were valued), although such differences must be interpreted with caution, given small sample sizes. In addition, participants offered recommendations for training, education, and policy relevant to future iterations of the FPC. In addition to contributing to the LL process for the FPC component of EX FS12 and enhancing the exercise planning process, the present findings help to address a gap in knowledge about the perceived effectiveness of joint training for WoG/interagency or comprehensive operations and thus may be used more generally to enhance training activities within a comprehensive context.

Résumé

La présente étude traite de l'évaluation que des participants ont réalisée sur la Conférence de planification finale (CPF) de l'exercice FRONTIER SENTINEL 2012 (EX FS12), l'une des rencontres de planification préparatoires à l'EX FS12, un exercice pangouvernemental ou interorganismes visant à donner l'occasion aux partenaires et aux intervenants de se consulter sur l'élaboration de plans d'exercice. L'étude a été conçue pour contribuer au processus des leçons retenues (LR) de cette CPF et pour améliorer le processus de planification des exercices. Vingt-et-un participants (onze civils représentant des organisations/ministères du gouvernement canadien et dix militaires, dont sept des Forces armées canadiennes et trois des forces armées des États-Unis) ont évalué les perceptions de la CPF en matière de partage et de planification des renseignements ainsi que de coordination et de collaboration. Les résultats indiquent que la grande majorité des participants, civils et militaires, estiment avoir été bien préparés pour la CPF et que celle-ci a été une réussite. La plupart considèrent que le partage des renseignements a été adéquat et que les idées ont circulé librement. La plupart estiment que les processus de planification des organisations civiles et militaires étaient compatibles et que les participants ont été en mesure de développer une démarche commune et unifiée pour la planification d'une mission. Tous conviennent, dans une certaine mesure, que la CPF a tenu compte des procédures, des buts et objectifs, des valeurs, des mandats ou des rôles et du style de communication de leur organisation respective. Pour décrire la portée de la collaboration de leur organisation au sein de l'équipe pangouvernementale, la plupart des participants ont choisi le terme « coordonnée » et quelques-uns, le terme « en coopération », « intégrée » ou « informée ». Toutefois, dans certains domaines, l'évaluation des participants militaires a été légèrement plus positive que celle des participants civils (p. ex., les participants militaires ont eu beaucoup plus tendance que les participants civils à affirmer que leur expertise et leur expérience étaient précieuses), bien qu'il faille prendre ces écarts avec prudence compte tenu du fait que l'échantillonnage était relativement petit. Les participants ont également formulé des recommandations relatives à l'instruction, à l'éducation et à la politique propres à la tenue de prochaines CPF. Outre la contribution au processus de LR de l'élément CPF de l'EX FS12 et l'amélioration du processus de planification des exercices, les présentes conclusions aident à combler certaines lacunes à propos de l'efficacité perçue de l'instruction combinée relative à des opérations pangouvernementales/interorganisationnelles ou générales et peuvent ainsi être utilisées de façon plus exhaustive pour améliorer les activités d'instruction dans un contexte global.

Executive summary

Whole of Government Training for the Comprehensive Approach to Operations: A Survey of the Final Planning Conference for Exercise FRONTIER SENTINEL 2012

Angela R. Febbraro; Kelly A. Piasentin; Megan M. Thompson; Adrienne Turnbull; DRDC Toronto TM 2012-132; Defence Research and Development Canada, Toronto Research Centre; December 2012.

Introduction or background: In recent years, the Canadian Armed Forces (CAF) has been adopting a comprehensive approach (CA) to operations, predicated upon effective joint, interagency, multinational, public (JIMP) collaboration (Leslie, Gizewski, & Rostek, 2008)—that is, effective interaction with a variety of civilian and military actors. Despite the promise of CA/JIMP, a number of challenges to effective comprehensive missions exist including differences in organizational culture and structure among CA actors (Olson & Gregorian, 2007). The CA literature has suggested that joint (civil–military) training opportunities may be one important way to address these challenges and to ensure better coordination among different organizations within comprehensive missions (e.g., Jenny, 2001). For instance, joint training opportunities are thought to encourage information sharing and the development of shared understanding of each other’s cultures, norms, priorities, and constraints before hitting the high risk and stress of operations. Despite the calls for joint training, however, there have been relatively few opportunities for training of this kind for CA civilian players and the military, and few systematic assessments of the perceptions of those who have participated in such training for comprehensive operations. Recent studies within a DRDC, Toronto Research Centre research program on CA have begun to fill this gap (e.g., Thompson, Febbraro, & Blais, 2011; Thompson, Febbraro, & Holton, 2012). The present study contributed to this work by exploring the perceptions of participants of the Final Planning Conference (FPC) for Exercise FRONTIER SENTINEL 2012 (EX FS12), a “Whole-of-Government” (WoG) or interagency exercise that included civilian government and military participants. The FPC was the final of a series of planning meetings that was held in preparation for EX FS12 proper in order to provide opportunities for partners and stakeholders to consult with one another in the development of exercise plans. The present study was designed to contribute to the Lessons Learned (LL) process for this FPC and to improve the exercise planning process. Twenty-one participants, including 11 civilians and 10 military personnel (seven from the CAF and three from the United States military, i.e., two from the United States Navy and one from the United States Coast Guard) completed a short paper-and-pencil survey that assessed perceptions of the FPC in terms of opportunities afforded for information sharing, planning, coordination, and collaboration.

Results: Overall, our survey results indicated that the FPC for EX FS12 was viewed positively by both military and civilian participants in terms of planning, information sharing, collaboration, and coordination. The vast majority of participants, both civilian and military, felt that they were well prepared for the FPC and that the FPC was a success. Most felt that information sharing was adequate, that communication was good among the WoG team, that shared situational awareness was achieved, and that ideas were exchanged freely. Further, most participants felt that the CAF was sufficiently aware of the roles, responsibilities, resources, and constraints of the civilian

government organizations and vice versa, that the goals of the different organizations overlapped, and that the values of the different organizations were compatible. Similarly, most participants agreed that the planning processes of the military and civilian organizations were compatible, that emergency plans were complementary, and that participants were able to develop a common and unified approach to mission planning. All participants agreed, to some extent, that the FPC took into account their respective organization's procedures, goals and objectives, values, mandates or roles, and communication style. The majority of respondents agreed that their role and responsibilities were clear, that their participation and experience were valued, that their expertise was acknowledged, and that they were able to influence the decisions and actions of the WoG team. The majority of participants also agreed that the other organizations in the WoG team possessed characteristics that suggest trustworthiness (i.e., the other WoG organizations were seen by respondents as competent, as motivated to facilitate the goals of the respondent's organization, and as reliable). In describing the extent of their organization's collaboration within the WoG team, most participants chose the term "coordinated," whereas a few participants chose the term "cooperated," "integrated," or "informed." However, in some areas, military participants' assessments were slightly more positive than those of civilian participants (e.g., military participants were significantly more likely than civilian participants to report that their expertise and experience were valued, and that information sharing was adequate), although such differences must be interpreted with caution, given small sample sizes.

In addition, participants offered recommendations for training, education, and policy relevant to future iterations of the FPC. Some participants suggested ways to enhance preparation for the FPC, such as having a common "place" (e.g., SharePoint portal or website) for sharing information (e.g., contact lists, common products, draft documents, and lists of acronyms) prior to the FPC, having an overall preparation session, and having opportunities for smaller meetings with specialized discussions prior to the FPC. Other recommendations included having greater knowledge of other government departments prior to the meeting, using smaller group sizes for meetings, and maintaining agreements and commitments (i.e., not changing these later in the process). Recommendations for training and education from military participants included (a) annual training; (b) incorporating full-scale, table top and command post exercises into training as well as staff discussions; and (c) emphasizing in training that "no agency works in isolation." Recommendations from civilian participants included (a) providing more opportunities to work together and to understand the roles of each organization, (b) developing and sharing an acronym dictionary in advance of meetings, and (c) distributing materials in advance of the meeting. Policy-related recommendations (all by military participants) were consistent with the above training recommendations.

Significance: In addition to contributing to the LL process for the FPC component of EX FS12, improving the exercise planning process, and informing future iterations of the FPC, the present findings help to address a gap in knowledge about the perceived effectiveness of joint training for comprehensive operations and thus may be used more generally to enhance training activities within a comprehensive context. In so doing, this research represents a contribution to a larger DRDC, Toronto Research Centre research program investigating the effectiveness of joint training as preparation for CA missions, as well as other key social and organizational issues that affect collaboration in a comprehensive environment. Ultimately, the research enhances our ability to provide scientific advice to decision makers based on systematic feedback from the people who do the jobs, in order to improve planning and training for CA contexts and thus to enhance the probability of mission success.

Future plans: Future research should continue to examine the effectiveness of joint training for CA. For example, with a view to implications for collaboration, future work should examine the extent to which joint training opportunities reflect the organizational cultures/structures of both civilian and military organizations, and the extent to which both military and civilian participants in such training activities perceive that their expertise is valued.

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Sommaire

Whole of Government Training for the Comprehensive Approach to Operations: A Survey of the Final Planning Conference for Exercise FRONTIER SENTINEL 2012

Angela R. Febbraro; Kelly A. Piasentin; Megan M. Thompson; Adrienne Turnbull ; DRDC Toronto TM 2012-132 ; R & D pour la défense Canada – Toronto; décembre 2012.

Introduction ou contexte : Au cours des dernières années, les Forces armées canadiennes (FAC) ont adopté une approche globale (AG) à l'égard des opérations, fondée sur une collaboration interarmées, interorganisationnelle, multinationale et publique (IIMP) (Leslie, Gizewski & Rostek, 2008)—en d'autres mots, une interaction efficace avec une variété d'acteurs civils et militaires. Malgré la promesse d'une AG et d'une collaboration IIMP, un certain nombre de problèmes relatifs aux missions globales efficaces persistent, notamment des différences en matière de culture et de structure organisationnelles entre les acteurs AG (Olson & Gregorian, 2007). La documentation sur l'AG suggère que les possibilités d'instruction combinée (civiles et militaires) peuvent constituer une façon importante de régler ces problèmes et assurer une meilleure coordination entre diverses organisations dans le cadre de missions globales (p. ex., Jenny 2001). À titre d'exemple, les possibilités d'instruction combinée favorisent l'échange de renseignements et l'élaboration d'une compréhension commune des cultures, des normes, des priorités et des contraintes des uns des autres avant que ne surviennent le risque élevé et le stress des opérations. Toutefois, malgré les appels d'instruction combinée, il y a eu relativement peu de possibilités d'instruction de ce type pour les acteurs civils et les militaires AG et seulement quelques évaluations systématiques des perceptions de ceux qui ont participé à une instruction de ce genre pour des opérations globales. Des études récentes à RDDC, réalisées dans le cadre d'un programme de recherche sur l'AG au Centre de recherche de Toronto, ont été entreprises pour corriger cette lacune (p. ex., Thompson, Febbraro & Blais, 2011; Thompson, Febbraro & Holton, 2012). La présente étude a contribué à ces travaux en analysant la perception qu'ont les participants envers la Conférence de planification finale (CPF) de l'exercice FRONTIER SENTINEL 2012 (EX FS12), un exercice pangouvernemental ou interorganismes auquel participent des représentants civils du gouvernement et des militaires. La CPF est la dernière d'une série de rencontres de planification préparatoires à l'EX FS12 visant à donner l'occasion aux partenaires et aux intervenants de se consulter sur l'élaboration de plans d'exercice. L'étude a été conçue pour contribuer au processus des leçons retenues (LR) de cette CPF et pour améliorer le processus de planification des exercices. Vingt-et-un participants, dont onze civils et dix militaires (sept des Forces armées canadiennes et trois des forces armées des États-Unis, c.-à-d. deux de la Marine américaine et un de la Garde côtière américaine), ont réalisé une brève enquête pour évaluer les perceptions de la CPF en matière de partage et de planification de renseignements ainsi que de coordination et de collaboration.

Résultats : Dans l'ensemble, les résultats de l'enquête indiquent que la CPF de l'EX FS12 a été considérée positivement par les participants civils et militaires en matière de partage et de planification de renseignements ainsi que de coordination et de collaboration. La grande majorité des participants, civils et militaires, estiment avoir été bien préparés pour la CPF et que celle-ci a

été une réussite. La plupart considèrent que le partage des renseignements était adéquat, que les communications entre les membres de l'équipe pangouvernementale étaient bonnes, que le partage de la connaissance de la situation a été réalisé et que les idées ont circulé librement. De plus, la plupart des participants estiment que les FAC connaissaient suffisamment les rôles, les responsabilités, les ressources et les contraintes des organisations gouvernementales civiles, et vice versa, que les objectifs des divers organismes se chevauchaient et que les valeurs des divers organismes étaient compatibles. De la même façon, la plupart des participants ont convenu que les processus de planification des organisations civiles et militaires étaient compatibles, que les plans d'urgence étaient complémentaires et que les participants étaient en mesure de développer une approche commune et unifiée à la planification d'une mission. Tous les participants ont convenu, dans une certaine mesure, que la CPF a tenu compte des procédures, des buts et objectifs, des valeurs, des mandats ou des rôles et du style de communication de leur organisation respective. La majorité des répondants ont convenu que leur rôle et leurs responsabilités étaient clairs, que leur participation et leur expérience étaient valorisées et qu'ils étaient en mesure d'influencer les décisions et les actions de l'équipe pangouvernementale. La majorité des participants ont également convenu que les autres organisations de l'équipe pangouvernementale possèdent des caractéristiques qui inspirent la fiabilité (c.-à-d. que les répondants considéraient les autres organisations pangouvernementales comme compétentes, déterminées à faciliter la réalisation de leurs buts et fiables). Pour décrire la portée de la collaboration de leur organisation au sein de l'équipe pangouvernementale, la plupart des participants ont choisi le terme « coordonnée » et quelques-uns, le terme « en coopération », « intégrée » ou « informée ». Toutefois, dans certains domaines, l'évaluation des participants militaires a été légèrement plus positive que celle des participants civils (p. ex., les participants militaires ont eu beaucoup plus tendance que les participants civils à affirmer que leur expertise et leur expérience étaient valorisées et que le partage des renseignements était adéquat), bien qu'il faille prendre ces écarts avec prudence compte tenu du fait que l'échantillonnage était relativement petit.

Les participants ont également formulé des recommandations relatives à l'instruction, à l'éducation et à la politique propres à la tenue de prochaines CPF. Certains participants ont suggéré des façons d'améliorer la préparation de la CPF, comme avoir un « endroit » commun (p. ex., un portail SharePoint ou un site Web) pour partager des renseignements (p. ex., listes de personnes-ressources, produits communs, projets de document et listes d'acronymes) avant la CPF, tenir une séance préparatoire d'ensemble et de petites réunions destinées à des discussions spécialisées avant la CPF. Entre autres recommandations, notons le fait d'avoir une meilleure connaissance d'autres ministères du gouvernement avant la réunion, l'utilisation de réunions en petits groupes et le maintien d'ententes et d'engagements (c.-à-d. ne pas les modifier plus tard au cours du processus). Les recommandations des participants militaires relatives à l'instruction et à l'éducation comprenaient les points que voici : (a) l'instruction annuelle; (b) l'intégration à l'instruction d'exercices à grand déploiement, sur table, et de poste de commandement ainsi que de discussions d'état-major; (c) insister, dans le cadre de l'instruction, sur le fait « qu'aucune organisation ne travaille seule ». Les recommandations des participants civils comprenaient les points suivants : (a) fournir davantage d'occasions de travailler ensemble et comprendre les rôles de chaque organisation; (b) rédiger et partager un dictionnaire d'acronymes avant les réunions; (c) remettre la documentation avant la réunion. Les recommandations liées à la politique (toutes formulées par les participants militaires) étaient cohérentes avec les recommandations formulées ci-dessus en matière d'instruction.

Portée : Outre la contribution au processus de LR de l'élément CPF de l'EX FS12, l'amélioration du processus de planification de l'exercice et la préparation de prochaines CPF, les présentes conclusions aident à combler certaines lacunes à propos de l'efficacité perçue d'une instruction combinée relative à des opérations globales et peuvent ainsi être utilisées de façon plus générale pour améliorer les activités d'instruction dans un contexte global. Ainsi, la recherche apporte une contribution à un programme de recherche élargi du Centre de recherche de RDDC Toronto sur l'efficacité de l'instruction combinée pour la préparation de missions faisant l'objet d'une approche globale (AG) de même que sur d'autres problèmes sociaux et organisationnels clés ayant des répercussions sur la collaboration dans un contexte global. En fin de compte, la recherche améliore notre capacité à fournir des conseils scientifiques aux décideurs en s'inspirant des commentaires systématiques des gens qui font le travail, dans le but d'améliorer la planification et l'instruction relatives aux contextes d'approche globale (AG) et ainsi, pour améliorer la probabilité qu'une mission réussisse.

Travaux futurs : D'autres recherches devraient continuer d'examiner l'efficacité de l'instruction combinée relativement à l'AG. À titre d'exemple, en tenant compte de ce qu'englobe la collaboration, il y aurait lieu d'examiner jusqu'à quel point les possibilités d'instruction combinée reflètent les cultures/structures organisationnelles des organisations civiles et militaires, et jusqu'à quel point les participants civils et militaires à ces activités d'instruction considèrent que leur expertise est valorisée.

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Table of contents

Abstract	i
Résumé	ii
Executive summary	iii
Sommaire	vii
Table of contents	xi
List of figures	xiii
List of tables	xiv
Acknowledgements	xv
1 Introduction.....	1
1.1 Background	1
1.2 Joint Training	1
1.3 Exercise FRONTIER SENTINEL 2012.....	2
1.4 Purpose of the Study.....	4
2 Method.....	5
2.1 Participants and Procedures.....	5
3 Results.....	7
3.1 Overview	7
3.2 Previous WoG Experience	7
3.3 Pre-Planning Preparation.....	9
3.4 Experiences at the FPC.....	9
3.4.1 Perceptions of the FPC Outcomes	10
3.4.2 Perceptions of Information Sharing.....	10
3.4.3 Perceptions of Group Interactions	10
3.4.4 Perceptions of Individual Contributions.....	11
3.4.5 Perceptions of the Other Organizations	12
3.4.6 Perceptions of the WoG Team.....	12
3.5 Understanding Other Organizations in the WoG Team	13
3.6 Planning.....	14
3.7 Coordination and Collaboration	15
3.7.1 Integration of Different Organizational Cultures and Structures.....	15
3.7.2 Collaboration Within the WoG Team.....	16
4 Summary and Discussion of Findings	18
4.1 Information Sharing, Planning, Coordination, and Collaboration at the FPC for EX FS12	18
4.2 Recommendations for Enhancing the FPC.....	20
4.3 Conclusions	21
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Annex A	Information Sheet—Survey	25
Annex B	EX FS12 FPC Survey	26
Annex C	Qualitative Responses	30
Annex D	Frequency Distributions	33
	List of symbols/abbreviations/acronyms/initialisms	35

List of figures

Figure 1: Age distribution of participants.....	6
Figure 2: Perceptions of collaboration within the WoG team.	16

List of tables

Table 1: Number of previous experiences participating in WoG exercises.	8
Table 2: Number of previous experiences participating in WoG training/education.	8
Table 3: Number of respondents who participated in previous planning sessions.	9
Table 4: Perceptions of information sharing.	10
Table 5: Perceptions of group interactions.	11
Table 6: Perceptions of individual contributions.	12
Table 7: Perceptions of the other organizations.	12
Table 8: Perceptions of the WoG team.	13
Table 9: Understanding of other organizations.	14
Table 10: Organizational planning processes.	15
Table 11: Organization’s culture/structure.	16

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1 Introduction

1.1 Background

For the past several years, the Canadian Armed Forces (CAF) has been adopting a comprehensive approach (CA) to operations, which is predicated upon effective joint, interagency, multinational, public (JIMP) collaboration. The capacity to be “JIMP-capable” has been cited by the Director of Land Concepts and Designs (DLCD) as an important enabler of CAF operations and a key means to ensure mission success in an increasingly complex mission environment (Leslie, Gizewski, & Rostek, 2008). From the military’s perspective, CA specifically entails an increased integration of two relatively new features: increased emphasis on interagency coordination within a “Whole of Government” (WoG) response, and an increased focus on the indigenous population as the true centre of gravity in comprehensive missions. As a result, there is a need to better understand the “interagency” and “public” aspects of JIMP/CA, respectively, both of which focus on the civil-military relationship. In order to address this need, two Applied Research Projects (ARPs) were developed within the Organizational Behaviour Group at Defence Research and Development Canada, Toronto Research Centre (DRDC, Toronto Research Centre): *Interagency Trust* (14ci), led by Dr. Megan Thompson, and *JIMP Essentials in the Public Domain: Implications for the Tactical Commander* (12og), led by Dr. Angela Febbraro. A common objective underlying both of these ARPs was to understand the key social and organizational issues that affect civil-military interactions within the JIMP/CA context.

As noted above, one aspect of optimal CA is predicated on an increased emphasis on coordination within a WoG response. However, and perhaps because of its basis in interdependency and collaboration among diverse players within a multi-team system (see DeChurch & Marks, 2006), a number of challenges to smooth and effective CA missions exists. Conflicting political agendas or at least incompatible objectives; organizational structure disparities (hierarchical and centralized vs. flat and decentralized); incompatible financial, knowledge management, and communication systems; little or no corporate memory; few formal lessons-learned mechanisms; poor funding and personnel shortfalls; and “competition for resources and agency profile” (Olson & Gregorian, 2007, p. 13) are all challenges to effective coordination in comprehensive operations (see also DeConing, 2008; Morcos, 2005; Patrick & Brown, 2007; Spence, 2002; Stephenson & Schnitzer, 2006; Winslow, 2002). All of these factors have contributed to increased tensions, for example, between civilian government and military personnel. Indeed, Patrick and Brown (2007) have concluded that, although individual successes have occurred, consistent and effective collaboration remains an elusive goal in such missions despite strategic-level endorsement. Similarly, Rietjens (2008) has noted that successes in these sorts of collaborations have often appeared to be ad hoc rather than systematic in nature. Thus, “[b]y all accounts the consensus ... at the policy level often bears little relationship to the messy reality of coordination efforts and practices” (Olson & Gregorian, 2007, p. 26). Applying this literature to a Canadian context suggests that, in general, there is a clear need to better understand the collaboration efforts among CAF personnel and civilian partners, including Canadian government partners (GPs).

1.2 Joint Training

The CA literature has suggested that joint training opportunities may be one important way to ensure better coordination among different organizations within comprehensive missions (e.g.,

Jenny, 2001; Mockaitis, 2004; Spence, 2002).¹ Joint training opportunities are thought to encourage information sharing and the development of shared understanding of each other's cultures, norms, priorities, and constraints before hitting the high risk and stress of operations. Despite such calls, there have been relatively few opportunities, to date, for training of this kind for CA civilian players and the military. Further, although initial anecdotal evidence has tended to support the importance of such joint training, thus far there have been few systematic assessments of the perceptions of those who have participated in training for comprehensive operations. Our efforts in this area have begun to address this gap. Specifically, our previous research assessed the impact, from the perspective of civilian government agency participants, of the joint training opportunity afforded by the CAF-led Exercise (EX) MAPLE GUARDIAN (Thompson, Febbraro, & Blais, 2011); a subsequent study explored the perceptions of training effectiveness among members of Non-Governmental Organizations (NGOs) and the CAF of the Canadian Army Formation Operations Centre of Excellence's first civil-military seminar held in March 2011 (Thompson, Febbraro, & Holton, 2012); and a third study explored perceptions of the training effectiveness of the second civil-military seminar, held in October 2011, among members of the CAF, NGOs, international organizations (IOs), and governmental organizations. Altogether, these studies indicate that such joint training experiences can be useful in fostering mutual understanding of organizational mandates and in promoting professional networks that may, in turn, be useful for future deployments, operations, or collaborations. Overall, despite the challenges inherent in such training, the data suggest that players in the CA sphere, both military and civilian, should consider this training as important preparation for missions in the comprehensive context. The present study builds on this previous work by exploring the perceptions of participants in another training opportunity, that of the Final Planning Conference (FPC) for Exercise FRONTIER SENTINEL 2012 (EX FS12), which was held 13–15 March 2012 (i.e., a few weeks prior to EX FS12). For this study, the first within our research program conducted in a maritime context, the perceptions of members of the CAF, the US military, and Canadian civilian government departments or agencies who attended the FPC were obtained.

1.3 Exercise FRONTIER SENTINEL 2012

Exercise FRONTIER SENTINEL began in 2006 for the purpose of exercising collaborative information exchange, planning, and coordination among civilian and military organizations that defend against threats to the maritime security of Canada and the United States. Organizations involved in the exercise include the CAF Joint Task Force Atlantic (JTFA) Headquarters, the United States Coast Guard (USCG), the United States Fleet Forces (USFF) and their tactical elements, as well as government and non-government agencies. The aim of EX FS12, which took place in April–May 2012, was to evaluate interagency planning and interoperability at the operational and tactical levels for the relevant maritime commands—USCG Atlantic Area (LANTAREA), USFF, and JTFA (the lead planning agent for EX FS12)—and other federal, state/provincial, and local government agencies. The exercise emphasized testing and validating applicable plans, treaties, and standard operating procedures in order to enhance maritime security operations within each command's Area of Operations. Specific objectives for EX FS12 that are relevant to CA missions included: conducting collaborative domestic security planning, including refining higher-echelon requests for information/intelligence (RFI) management, tools, and overall coordination/collaboration processes; exercising interaction with interagency security operations centres; and conducting collaborative maritime security planning and response.

¹ Although, in the military lexicon, the term “joint” refers to activities involving multiple services or environments (e.g., army, navy, and air force), it is used here to refer to civil-military or WoG activities and, in particular, training activities.

In terms of the concept of the exercise, EX FS12 was a combined US Commander Second Fleet (C2F), Commander US Coast Guard Atlantic Area (CAA), and CAF JTFA Full Scale Exercise (FSE).² The overall purpose of this bilateral, combined exercise was to conduct interagency planning and interoperability at the operational and tactical level to enable the development of combined information and/or intelligence exchange and planning, in order to generate a coordinated response in the execution of naval mine countermeasures (NMCM) operations following the simulated mining of a port in Canadian waters. During the initial phase of the exercise (intelligence buildup), injects were made to intelligence centres indicating that a criminal/terrorist organization had laid sea mines that threatened North American shipping lanes. In addition, an unrelated mass migrant incident developed, necessitating a coordinated regional WoG response from Canadian stakeholders. The initial phase included unrelated information (“chaff”) to add to the challenge of discerning relevant from irrelevant data. The initial phase then led to an assessment that eastern seaboard harbours—including Sydney, Nova Scotia, and Groton, Connecticut—had been mined. This set the stage for the Live Exercise (LIVEX) phase during which Canadian and US resources conducted NMCM operations to clear the approaches. Simultaneous exercise play continued with the combined participants intercepting and boarding one or more perpetrators of the mining, as well as coordinating their response to the mass migrant vessel.

In the year prior to EX FS12, a series of planning conferences were held. These included the Initial Planning Conference (IPC) (May 2011), the Main Planning Conference (MPC) (September 2011), the Master Scenario Events List (MSEL) (November-December 2011) and, as mentioned above, the final (and largest) joint planning conference, the FPC (March 2012). In general, such planning conferences are held in order to provide all partners and stakeholders with opportunities to consult with one another in the development of the Operational Plan (OP Plan) for an exercise.³ The scope of the OP plan and scenario(s) is developed at the IPC.⁴ Functional plans in support of the OP plan are developed at the MPC. The chronological listing of events (or injects) that drive operations-based exercise play⁵ is worked out at the MSEL. Lastly, the details of the various plans and directives are finalized at the FPC. The present study focused on the FPC for EX FS12, which, like the exercise proper, included a variety of military and civilian GP participants, as indicated above.

² The principal audience for the exercise included the USCG, USFF, NORAD Northern Command (NORAD N-C), Canada Command (CANCOM), the Royal Canadian Mounted Police (RCMP), Canada Border Service Agency (CBSA), Correctional Service of Canada (CSC), Transport Canada (TC), the Department of Fisheries and Oceans (DFO), the Nova Scotia Department of Health and Welfare (NS Dept H&W), the Public Health Agency of Canada (PHAC), the Red Cross, JTFA Headquarters, and 4 Engineer Support Regiment (4 ESR).

³ Associated functional, support, and Government Partner (GP) plans are produced using the Operational Planning Process (OPP).

⁴ The call letters for this conference are typically distributed to all L1s and Government Partners (GPs) several months in advance.

⁵ Similarly, a Scenario Writing Board (SWB) may be held to develop the scenario directive and script that will direct exercise play during the employment phase of an exercise.

1.4 Purpose of the Study

As part of the Lessons Learned (LL) process for the FPC component of EX FS12,⁶ the present study sought to generate knowledge about the usefulness of the FPC from the perspective of the participants, both military and civilian. This knowledge will be used to inform future iterations of the FPC, future exercise planning processes, as well as, potentially, other similar WoG/interagency planning meetings within a CA context. More specifically, a paper-and-pencil survey was used to assess perceptions of the FPC in terms of the opportunities afforded for information sharing, planning, coordination, and collaboration. Thus, the purpose of this study was to contribute to the development of a systematic understanding of participant perceptions related to joint training exercises—specifically, in the present case, the FPC for EX FS12—within the JIMP/WoG/CA paradigm.

⁶ On conclusion of EX FS12, the JTFA J7 Lessons Learned cell was responsible for co-ordinating an after-action process to include a *Canadian Interdepartmental Lessons Learned Report* compiled by Public Safety, with specific focus on the migrant vessel event.

2 Method

2.1 Participants and Procedures

Participants in this study were individuals who attended the FPC for EX FS12, which took place on March 13–15, 2012, at the Maritime Forces Atlantic (MARLANT) JTFA Headquarters building D-201 in Halifax, Nova Scotia. Participants, all of whom were volunteers, included civilian representatives from a variety of Canadian government departments as well as CAF and US military personnel.

During the afternoon of the second day of the three-day conference, the study's co-investigator, Adrienne Turnbull, invited FPC attendees to complete a short (20-minute) paper-and-pencil survey (see Annex A for the survey information sheet). The survey was designed to elicit information regarding participants' perceptions of the FPC in terms of the opportunities afforded for information sharing, planning, coordination, and collaboration. The survey also solicited demographic information such as gender, age, and type of organization (i.e., civilian government partner vs. military). It asked participants about their WoG experience—whether they had previous experience participating in WoG exercises, training, or education. Finally, it inquired as to participants' involvement in other planning sessions prior to the FPC as well as their plans to attend EX FS12 (see Annex B for the FPC survey).

All individuals were informed prior to completing the survey that their participation was entirely voluntary and that their responses would remain confidential and anonymous. Further, they were assured that only authorized researchers would have access to the data, and that only group results (or results unattributed to source in the case of participants' open-ended survey comments) would be presented.⁷ Participants did not receive any remuneration.

A total of 21 individuals completed the FPC survey, which represented a response rate of approximately 35% (an estimated 60 individuals participated in the FPC). Survey participants were military personnel ($n = 10$) or civilian employees ($n = 11$) from a variety of government organizations. Military participants included individuals from the CAF ($n = 7$), the US Navy ($n = 2$), and the USCG ($n = 1$). Civilian participants included employees of the Department of National Defence ($n = 4$) and other (non-defence) Canadian government agencies and departments ($n = 7$).

Participants ranged in age from 25–34 ($n = 3$), 35–44 ($n = 7$), 45–54 ($n = 7$), and 55 years and older ($n = 3$).⁸ As shown in Figure 1, civilian participants varied in age more than military participants. That is, civilian participants were spread out over all four age categories and were more likely than military participants to fall into the younger (25–34, $n = 3$ vs. $n = 0$) and older age brackets (55+, $n = 2$ vs. $n = 1$). Military participants, on the other hand, were more likely than civilian participants to fall into the two middle-age brackets (35–44, $n = 4$ vs. $n = 3$; 45–54, $n = 4$ vs. $n = 3$). Notably, the youngest group of participants (the 25–34 group) were all civilian ($n = 3$). The majority of survey respondents (76%) were male ($n = 16$). Of the five female respondents, one was a military member and four were civilian employees. Thus, 10% of the military participants in the study were female, whereas 36% of the civilian participants were female.

⁷ Given the small number of participants and the minimal risk nature of this study, we used an unsigned consent procedure.

⁸ One respondent did not provide information on age.

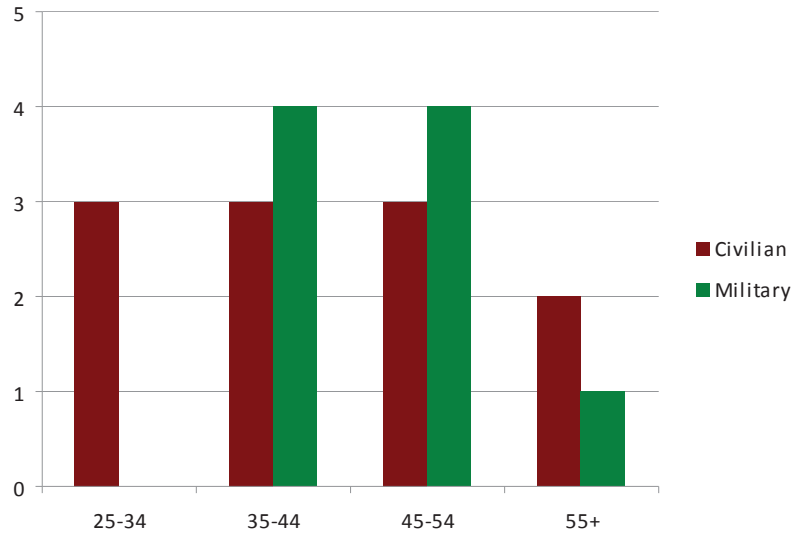


Figure 1: Age distribution of participants.

All but one respondent indicated that they would be participating in EX FS12, either as part of the “blue team” (i.e., as participants in the exercise; $n = 4$), the “white cell” (i.e., as organizers of the exercise; $n = 11$), or as an “other” attendee (i.e., neither an organizer nor exercise participant; this group included computer technicians, lawyers, etc.; $n = 5$).

3 Results

3.1 Overview

Participants' responses to the survey were analysed in terms of descriptive statistics (i.e., frequencies, means, and standard deviations). To identify differences in mean ratings between military and civilian participants, Independent Groups t-test analyses were also computed. Group differences that were statistically significant (using an alpha level of .05) are highlighted; however, due to the small sample size, these results should be interpreted with caution⁹.

Where relevant, responses to open-ended questions were also included in order to supplement the quantitative data, to illustrate particular findings (Johnson, 1998; King, 2004; Strauss & Corbin, 1990), and to highlight participant recommendations. Qualitative responses to the open-ended questions are provided in Annex C.

The results are presented thematically in the following order:

- previous WoG experience,
- pre-planning preparation,
- experiences at the FPC (i.e., perceptions of the FPC outcomes, information sharing, group interactions, individual contributions, other organizations, and the WoG team),
- understanding of other organizations in the WoG team,
- planning, and
- coordination and collaboration.

3.2 Previous WoG Experience

Participants were asked to indicate the number of times they had previously participated in a WoG exercise. The majority of survey respondents ($n = 16$; 76%) reported having at least one prior experience. As Table 1 shows, four participants (19%) had previously participated in one other WoG exercise, two participants (9.5%) had two prior experiences, four participants (19%) had three prior experiences, and six participants (28.6%) had four or more prior experiences. Subgroup comparisons revealed that military and civilian participants had similar numbers of prior WoG experiences, with an average of 2.4 and 2.2 experiences, respectively.¹⁰

⁹ In order to conduct inferential statistical analyses with sufficient *power*—defined as the probability that the test will reject the null hypothesis (e.g., that there is no difference between the two groups) when the null hypothesis is indeed false—a sample size twice as large as the current sample of 21 (i.e., approximately 40 individuals) is recommended.

¹⁰ To calculate these averages, participants who selected “4 or more” were counted as having participated in four exercises.

Table 1: Number of previous experiences participating in WoG exercises.

	Military		Civilian		Total	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
0	1	10.0%	2	18.2%	3	14.3%
1	2	20.0%	2	18.2%	4	19.0%
2	1	10.0%	1	9.1%	2	9.5%
3	2	20.0%	2	18.2%	4	19.0%
4+	3	30.0%	3	27.3%	6	28.6%
Total	9	90.0%	10	90.9%	19	90.5%

Note. Two participants (1 military and 1 civilian) did not provide a response to this question.

Participants were also asked to indicate the number of times they had previously participated in WoG training or education. The majority of respondents ($n = 14$; 67%) reported having received prior WoG training/education. As can be seen in Table 2, four participants had one prior training/education experience (19%), three participants had two (14.3%), one participant had three (4.8%), and six participants (28.6%) had four or more prior experiences. As with the above findings, military and civilian participants had a similar number of prior experiences participating in WoG training or education (an average of 1.9 vs. 1.8 experiences, respectively).

Table 2: Number of previous experiences participating in WoG training/education.

	Military		Civilian		Total	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
0	3	30.0%	3	27.3%	6	28.6%
1	2	20.0%	2	18.2%	4	19.0%
2	1	10.0%	2	18.2%	3	14.3%
3	1	10.0%	0	0%	1	4.8%
4+	3	30.0%	3	27.3%	6	28.6%
Total	10	100%	10	90.9%	20	95.2%

Note. One civilian participant did not provide a response to this question.

Respondents were asked to indicate whether or not they had participated in the IPC, the MPC, the MSEL development meeting, or other planning sessions. As Table 3 illustrates, most participants took part in MSEL development ($n = 13$; 61.9%) and the MPC ($n = 12$; 57.1%). Comparatively fewer participants took part in the IPC ($n = 6$; 28.6%). Military participants were more likely than civilian participants to have taken part in the IPC, MPC, and MSEL development, whereas civilian participants were slightly more likely than military participants to have taken part in other planning sessions.

Table 3: Number of respondents who participated in previous planning sessions.

	Military		Civilian		Total	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
IPC	4	40.0%	2	18.2%	6	28.6%
MPC	8	80.0%	4	36.4%	12	57.1%
MSEL Development	7	70.0%	6	54.5%	13	61.9%
Other	4	40.0%	5	45.5%	9	42.9%

Note. Two civilian participants did not provide a response to this question.

3.3 Pre-Planning Preparation

Respondents were asked to rate the extent to which they felt adequately prepared for the FPC on a 5–point scale (1 = *not at all*; 2 = *a little*; 3 = *somewhat*; 4 = *mostly*; 5 = *completely*). The mean rating across participants was 3.81 ($SD = .81$). Overall, participants felt “mostly” prepared ($n = 16$; 76%), with fewer participants feeling “a little” prepared ($n = 3$; 14%) or “completely” prepared ($n = 2$; 10%). Subgroup comparisons revealed no significant differences in mean ratings between military participants ($M = 3.80$; $SD = .63$) and civilian participants ($M = 3.82$; $SD = .98$).

Participants were asked to comment specifically on what they found useful as preparation for the FPC. Some participants noted that attending other planning conferences and events (e.g., the MPC and MSEL) was helpful, while other participants commented on a specific aspect of a planning session that was particularly useful (e.g., “MSEL writing board”; “Timeline information at MSEL”). Other respondents noted that previously reviewing planning documents or interacting with other organizations was useful. For example, one participant commented that “it was useful to plan in small groups and then come together to see how everything fits together.”

In terms of what participants would have found useful as preparation, responses were varied. Several participants commented on the potential benefit of having a common “place” (e.g., SharePoint portal or website) for sharing information, such as contact lists or common products, or for posting current draft documents. Other comments included having the meaning of various acronyms explained beforehand, having an opportunity to review the exercise plan before the FPC, having an overall preparation session, and having opportunities for smaller meetings with specialized discussions prior to the FPC.

3.4 Experiences at the FPC

Participants’ experiences at the FPC were evaluated by asking them to rate their level of agreement with 20 statements. These statements were designed to assess participants’ perceptions of the FPC experience in terms of (a) outcomes, (b) information sharing, (c) group interactions, (d) individual contributions, (e) other participating organizations, and (f) the WoG team. The statements were rated on a 6–point scale (1 = *strongly disagree*; 2 = *disagree*; 3 = *slightly disagree*; 4 = *slightly agree*; 5 = *agree*; 6 = *strongly agree*). The frequency ratings for each statement are provided in Annex D.

3.4.1 Perceptions of the FPC Outcomes

Participants were asked to indicate their level of agreement with the statement “*From my perspective, the FPC was successful.*” Overall, the majority (90%) of participants “agreed” ($n = 14$) or “strongly agreed” ($n = 5$) that the FPC was successful.¹¹ Across participants, the mean rating was 5.20 ($SD = .52$) out of a possible score of 6.00. Subgroup analyses revealed that military participants ($M = 5.30$; $SD = .48$) and civilian participants ($M = 5.10$; $SD = .57$) did not differ significantly in their ratings of FPC success.

When asked to comment on aspects of the FPC that were successful or unsuccessful, some participants noted that the FPC could be improved by providing certain materials to participants in advance of the meeting. Comments from civilian participants included having a list of acronyms, a draft of the MSEL, and the exercise concept prior to the meeting. Comments from military participants included having a copy of the agenda prior to the meeting.

3.4.2 Perceptions of Information Sharing

Participants were asked to rate their level of agreement with three statements pertaining to information sharing between the various organizations at the FPC (see Table 4). The average rating across the three statements was 5.14 ($SD = .68$) out of a possible score of 6.00. The majority of respondents “agreed” or “strongly agreed” that (a) information sharing was adequate ($n = 18$; 86%), (b) the WoG team had good communication ($n = 17$; 81%), and (c) the WoG team exchanged ideas freely ($n = 18$; 86%).

The mean ratings of military participants were higher than the mean ratings of civilian participants for all three statements, and these ratings were statistically significantly different for two of the statements. Specifically, military participants ($M = 5.50$; $SD = .53$) were significantly more likely than civilian participants ($M = 4.91$; $SD = .70$) to perceive that information sharing was adequate, $t(19) = 2.17$, $p = .043$. Military participants ($M = 5.40$; $SD = .52$) were also significantly more likely than civilian participants ($M = 4.73$; $SD = .65$) to perceive that the WoG team had good communication, $t(19) = 2.62$, $p = .017$.

Table 4: Perceptions of information sharing.

	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
Information sharing was adequate.	5.19	.68	5.50	.53	4.91	.70	2.17	.043
The WoG team had good communication.	5.05	.67	5.40	.52	4.73	.65	2.62	.017
The WoG team exchanged ideas freely.	5.19	.68	5.40	.70	5.00	.63	1.38	.185

Note. Responses were made on a 6–point scale: 1 = strongly disagree; 2 = disagree; 3 = slightly disagree; 4 = slightly agree; 5 = agree; 6 = strongly agree.

3.4.3 Perceptions of Group Interactions

Participants were asked to rate their level of agreement with five statements pertaining to group interactions between the various organizations at the FPC (see Table 5). The average rating across the five statements was 4.85 ($SD = .65$) out of a possible score of 6.00. The majority of respondents

¹¹ One civilian participant did not provide a response.

“agreed” or “strongly agreed” that (a) shared situational awareness was achieved ($n = 17$; 81%); (b) the CAF was sufficiently aware of the roles, responsibilities, resources, and constraints of the GPs ($n = 16$; 76%); (c) the GPs were sufficiently aware of the roles, responsibilities, resources, and constraints of the CAF ($n = 16$; 76%); (d) the goals of the different organizations overlapped ($n = 12$; 57%); and (e) the values of the different organizations were compatible ($n = 17$; 81%).

The mean ratings of military participants were higher than the mean ratings of civilian participants for all five statements; however, none of these ratings were statistically significantly different.

Table 5: Perceptions of group interactions.

	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
Shared situational awareness was achieved.	5.05	.67	5.30	.68	4.82	.60	1.73	.100
The CAF was sufficiently aware of the roles, responsibilities, resources, and constraints of the GPs during the FPC.	4.86	.57	5.00	.47	4.73	.65	1.09	.288
The GPs were sufficiently aware of the roles, responsibilities, resources, and constraints of the CAF during the FPC. ^a	4.90	.55	5.11	.33	4.73	.65	1.71	.107
My organization's goals overlap with the rest of the WoG team. ^a	4.50	.89	4.67	1.12	4.36	.67	.396	.537
My organization's values are generally compatible with the values of the WoG team.	4.95	.59	5.10	.74	4.82	.41	2.21	.153

Note. Responses were made on a 6–point scale: 1 = strongly disagree; 2 = disagree; 3 = slightly disagree; 4 = slightly agree; 5 = agree; 6 = strongly agree.

^a One military participant did not respond to this statement.

3.4.4 Perceptions of Individual Contributions

Participants rated their level of agreement with five statements pertaining to perceptions of their individual contributions at the FPC (see Table 6). The average rating across the five statements was 4.84 ($SD = .68$) out of a possible score of 6.00. The majority of participants “agreed” or “strongly agreed” that (a) their role and responsibilities were clear ($n = 20$; 95%), (b) their participation was valued ($n = 13$; 62%), (c) their expertise was acknowledged ($n = 14$; 67%), (d) their experience was valued ($n = 14$; 67%), and (e) they were able to influence the decisions and actions of the WoG team ($n = 14$; 67%).

The mean ratings of military participants were higher than the mean ratings of civilian participants for all five statements. These ratings were statistically significantly different for two of the five statements. In particular, military participants ($M = 5.10$; $SD = .57$) were significantly more likely than civilian participants ($M = 4.36$; $SD = .67$) to perceive that their expertise was acknowledged and that their experience was valued, $t(19) = 2.69$, $p = .014$.

Table 6: Perceptions of individual contributions.

	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
My role and responsibilities were clear.	5.14	.48	5.20	.63	5.09	.30	.497	.628
My participation was valued.	4.76	.70	5.00	.67	4.55	.69	1.54	.141
My expertise was acknowledged.	4.71	.72	5.10	.57	4.36	.67	2.69	.014
My experience was valued.	4.71	.72	5.10	.57	4.36	.67	2.69	.014
I felt as though I was able to influence the decisions made and actions taken.	4.90	.77	5.20	.63	4.64	.81	1.77	.094

Note. Responses were made on a 6-point scale: 1 = strongly disagree; 2 = disagree; 3 = slightly disagree; 4 = slightly agree; 5 = agree; 6 = strongly agree.

3.4.5 Perceptions of the Other Organizations

Participants were asked to indicate their level of agreement with three statements pertaining to their perceptions of the other organizations at the FPC (see Table 7). The average rating across the three statements was 4.94 (*SD* = .64) out of a possible score of 6.00. The majority of participants “agreed” or “strongly agreed” that the other organizations in the WoG team were (a) competent (*n* = 17; 81%), (b) motivated to facilitate the goals of the respondent’s organization (*n* = 18; 86%), and (c) reliable (*n* = 19; 91%). It is worth noting that aspects such as competence and reliability are relevant to building inter-organizational trust.

The mean ratings of military participants were higher than the mean ratings of civilian participants for all three statements; however, none of these ratings were statistically significantly different.

Table 7: Perceptions of the other organizations.

	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
I have faith in the abilities of the other organizations in the WoG team.	4.86	.79	5.00	.47	4.73	1.01	.780	.445
The other organizations in the WoG team are motivated to facilitate the goals of my organization.	4.90	.63	5.00	.67	4.82	.60	.656	.519
The other organizations in the WoG team are reliable.	5.05	.50	5.10	.57	5.00	.45	.451	.657

Note. Responses were made on a 6-point scale: 1 = strongly disagree; 2 = disagree; 3 = slightly disagree; 4 = slightly agree; 5 = agree; 6 = strongly agree.

3.4.6 Perceptions of the WoG Team

Participants were asked to indicate their agreement with three statements pertaining to perceptions of the WoG team (see Table 8). The average rating across the three statements was 5.02 (*SD* = .71) out of a possible score of 6.00. The majority of participants “agreed” or “strongly agreed” that (a) the WoG team fulfilled its roles and responsibilities (*n* = 19; 91%); (b) the WoG team’s objectives, methods, and end state were clearly communicated and understood (*n* = 16; 76%); and (c) the WoG team built a good foundation for a positive future relationship (*n* = 20; 95%).

The mean ratings of military participants were higher than the mean ratings of civilian participants for all three statements; however, none of these ratings were statistically significantly different.

Table 8: Perceptions of the WoG team.

	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
Overall, I am confident that the WoG team fulfilled its roles and responsibilities. ^a	5.15	.49	5.30	.48	5.00	.47	1.41	.177
The WoG team's objectives, methods, and end state were clearly communicated and understood.	4.62	.92	4.80	1.03	4.45	.82	.853	.404
The WoG team built a good foundation for a positive future relationship.	5.29	.72	5.50	.53	5.09	.83	1.33	.199

Note. Responses were made on a 6-point scale: 1 = strongly disagree; 2 = disagree; 3 = slightly disagree; 4 = slightly agree; 5 = agree; 6 = strongly agree.

^a One civilian participant did not respond to this statement.

3.5 Understanding Other Organizations in the WoG Team

Participants were asked to rate the extent to which the FPC contributed to their understanding of (a) GPs, (b) the CAF, and (c) the US military. Responses were made on a 5-point scale (1 = *not at all/none*; 2 = *a little*; 3 = *some/somewhat*; 4 = *a great deal*; 5 = *extensively/completely*).

All participants agreed (at least to some extent) that the FPC contributed to their understanding of GPs ($M = 3.71$; $SD = .64$), with the majority of participants indicating that the FPC contributed “a great deal” ($n = 11$; 52%) or “extensively/completely” ($n = 2$; 10%) to their understanding. Eight respondents (38%) indicated that the FPC contributed “somewhat” to their understanding of GPs (see Table 9).

All but one participant¹² (95%) agreed that the FPC contributed to their understanding of the CAF ($M = 3.71$; $SD = .90$). Again, the majority of participants indicated that the FPC contributed either “a great deal” ($n = 11$; 52%) or “extensively/completely” ($n = 3$; 14%) to their understanding, and six participants (29%) indicated that the FPC contributed “somewhat” to their understanding of the CAF.

With regards to the US military, the mean rating was slightly lower in comparison ($M = 3.24$; $SD = 1.04$), with less than half of the participants indicating that the FPC contributed “a great deal” ($n = 7$; 33%) or “extensively/completely” ($n = 2$; 10%) to their understanding. Seven participants (33%) indicated that the FPC contributed “somewhat” to their understanding of the US forces, whereas four participants (19%) indicated that it only contributed “a little.” One participant (5%) indicated that the FPC did not contribute at all to his/her understanding of the US forces.

The mean ratings of military participants were higher than the mean ratings of civilian participants for all three statements. In particular, military participants ($M = 3.90$; $SD = .74$) were significantly more likely than civilian participants ($M = 2.64$; $SD = .92$) to indicate that the FPC contributed to their understanding of the US military, $t(19) = 3.44$, $p = .003$.

¹² This participant, a civilian, indicated having no contact with members of the CAF during the FPC.

Table 9: Understanding of other organizations.

Did this FPC contribute to your understanding of:	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
GPs	3.71	.64	3.80	.79	3.64	.51	.572	.574
CAF	3.71	.90	3.80	1.23	3.64	.51	.406	.689
US Forces	3.24	1.04	3.90	.74	2.64	.92	3.44	.003

Note. Responses were made on a 5–point scale: 1 = *not at all/none*; 2 = *a little*; 3 = *some/somewhat*; 4 = *a great deal*; 5 = *extensively/completely*.

3.6 Planning

Participants were asked to respond to three questions concerning the planning process used by the different organizations (see Table 10). Responses were made on a 5–point scale (1 = *not at all/none*; 2 = *a little*; 3 = *some/somewhat*; 4 = *a great deal*; 5 = *extensively/completely*). All participants agreed (at least to some extent) that the planning processes of the CAF and GPs were compatible ($M = 3.52$; $SD = .51$), with approximately half of the participants indicating that they were “a great deal” compatible ($n = 11$; 52%) and the other half indicating that they were “somewhat” compatible ($n = 10$; 48%).

Participants also agreed that the CAF and GP emergency plans were complementary ($M = 3.55$; $SD = .69$); one participant (5%) felt they were “extensively/completely” complementary, 10 participants (48%) felt they were “a great deal” complementary, eight participants (38%) felt they were “somewhat” complementary, and one participant (5%) felt they were “a little” complementary.

With regards to planning with other departments, all participants indicated that they were able to develop a common and unified approach to mission planning ($M = 3.71$, $SD = .64$). Two participants (10%) indicated that they were “completely” able, 11 participants (52%) that they were “a great deal” able, and eight participants (38%) that they were “somewhat” able to develop a common and unified approach to mission planning.

Subgroup analyses revealed that military participants ($M = 4.00$; $SD = .67$) were significantly more likely than civilian participants ($M = 3.27$; $SD = .65$) to believe that the CAF and GP emergency plans were complementary, $t(18) = 2.19$, $p = .042$. Military participants ($M = 4.00$; $SD = .67$) were also somewhat more likely than civilian participants ($M = 3.45$; $SD = .51$) to perceive that they were able to develop a common and unified approach to mission planning, with mean differences between the two groups approaching statistical significance, $t(19) = 2.10$, $p = .050$. However, there were no group differences between military and civilian participants in terms of whether the CAF and GP planning processes were seen as compatible.

Table 10: Organizational planning processes.

	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
Were the CAF and GP planning processes compatible?	3.52	.51	3.50	.53	3.55	.52	.198	.845
Do you believe the respective emergency plans are complementary?	3.55	.69	3.89	.60	3.27	.65	2.19	.042
When planning with other departments, were you able to develop a common and unified approach to mission planning?	3.71	.64	4.00	.67	3.45	.51	2.098	.050

Note. Responses were made on a 5-point scale: 1 = *not at all/none*; 2 = *a little*; 3 = *some/somewhat*; 4 = *a great deal*; 5 = *extensively/completely*.

Four participants (19%) felt they should have been more involved earlier in the planning process. Of these participants, two felt they should have been more involved at the IPC, one felt he/she should have been involved at the concept and objectives meeting, and one thought that more general information on the exercise should have been received prior to the meeting.

Participants made several suggestions for improving the planning process in WoG operations to ensure inclusion of the planning needs and requirements of all organizations. These included (a) having a “table top exercise prior to exercise day as a final coordination,” (b) distributing materials prior to the meeting (e.g., exercise concept, draft MSEL, newest editions of work, list of common acronyms used by each organization, etc.), (c) having greater knowledge of other government departments (OGDs) prior to the meeting, (d) using smaller group sizes for meetings, and (e) maintaining agreements and commitments made throughout the planning process (i.e., not changing these later in the process).

3.7 Coordination and Collaboration

3.7.1 Integration of Different Organizational Cultures and Structures

Participants were asked to rate the extent to which they believed the FPC took into account various aspects of their organization’s culture and structure (see Table 11). Responses were made on a 5-point scale (1 = *not at all/none*; 2 = *a little*; 3 = *some/somewhat*; 4 = *a great deal*; 5 = *extensively/completely*). Across participants, the average rating was 3.74 (*SD* = .75) out of a possible score of 5.00. All respondents agreed (at least to some extent) that the FPC took into account their organization’s procedures (*M* = 3.65; *SD* = .67), goals and objectives (*M* = 3.95; *SD* = .61), values (*M* = 3.86; *SD* = .66), mandates or roles (*M* = 3.86; *SD* = .79), and communication style (*M* = 3.76; *SD* = .77). All but one participant agreed (at least to some extent) that the FPC took into account their organization’s terminology (*M* = 3.38; *SD* = .97).

In terms of subgroup differences, the mean ratings of military participants were higher than the mean ratings of civilian participants for all six aspects of organizational culture/structure assessed. Military participants (*M* = 3.80; *SD* = .79) were somewhat more likely than civilian participants (*M* = 3.00; *SD* = 1.00) to perceive that the FPC took into account their organization’s approach to terminology, with mean differences between the two groups approaching statistical significance, *t* (19) = 2.02, *p* = .058). None of the mean ratings for the other five aspects of organizational culture/structure were significantly different.

Table 11: Organization's culture/structure.

Do you feel that the FPC took into account your organization's approach to...	Total		Military		Civilian		<i>t</i>	<i>p</i>
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>		
Procedures	3.65	.67	3.78	.67	3.55	.69	.764	.455
Goals and objectives	3.95	.61	4.00	.67	3.90	.57	.361	.722
Values	3.86	.66	4.00	.67	3.73	.65	.951	.353
Mandates or roles	3.86	.79	4.00	.67	3.73	.91	.780	.445
Communication style	3.76	.77	3.80	.79	3.73	.79	.211	.835
Terminology	3.38	.97	3.80	.79	3.00	1.00	2.02	.058

Note. Responses were made on a 5-point scale: 1 = not at all/none; 2 = a little; 3 = some/somewhat; 4 = a great deal; 5 = extensively/completely.

3.7.2 Collaboration Within the WoG Team

Participants were asked to choose the term that best defined the extent of their organization's collaboration within the WoG team. As can be seen in Figure 2, the majority of participants ($n = 12$; 57%) chose the term "coordinated"—that is, their organization actively sought and received information from the rest of the WoG team, and was actively included by the rest of the WoG team in the information process. Eight of these participants were civilians and four were military. Five participants (24%)—three civilians and two military—selected the term "cooperated," meaning their organization provided or received information that influenced their own plans. Three participants (14%)—all military—selected "integrated," implying that their organization was a full partner in planning, operational execution, information sharing, situational updates, etc. One military participant (5%) selected the term "informed," suggesting that their organization was involved at the information level only.

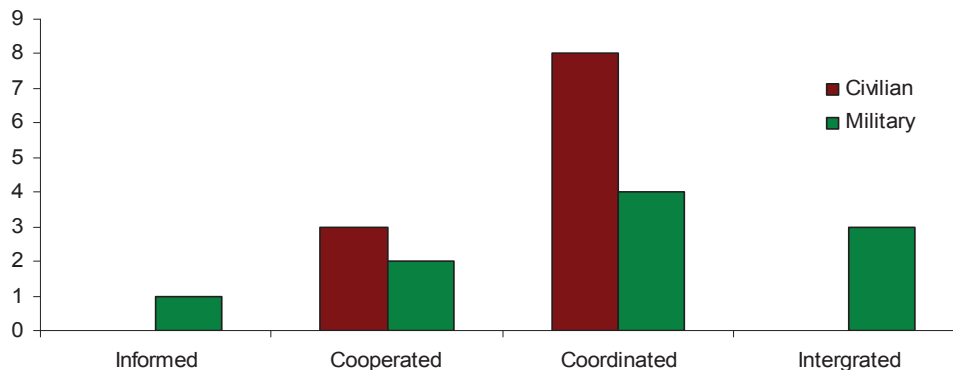


Figure 2: Perceptions of collaboration within the WoG team.

Participants were encouraged to provide recommendations or strategies for facilitating WoG collaboration in the future. Suggestions were made in terms of training/education and policy improvements. More specifically, recommendations from military participants regarding training and education included (a) providing training at least once a year; (b) incorporating full-scale exercises, table top exercises, and command post exercises into training as well as staff discussions; and (c) providing emphasis in training courses that "no agency works in isolation." Recommendations from civilian participants regarding training and education included (a) providing more opportunities to work together and to understand the roles of each organization

(including the opportunity for GPs to provide overviews of each other's organizations), (b) developing an acronym dictionary and sharing this in advance of meetings, and (c) distributing materials (e.g., a draft MSEL) in advance of the meeting. Policy-related recommendations for facilitating WoG collaboration included (a) creating a document that explains the roles, responsibilities, missions, mandates, and generic functions of each organization; and (b) establishing a process for outlining various aspects of the meeting (e.g., the aim, objectives, legal and union constraints, etc.). Both of these recommendations came from military participants.

4 Summary and Discussion of Findings

Joint training opportunities are considered an important means for facilitating teamwork within a comprehensive context (Jenny, 2001) and for addressing some of the challenges to effective collaboration identified in such contexts (Olson & Gregorian, 2007). The present study contributes to our current understanding of joint training for comprehensive or WoG/interagency operations by assessing the perceptions of participants, both military and civilian, of the opportunities for information sharing, planning, coordination, and collaboration afforded by the FPC for EX FS12. In addition, this study also generated participant feedback regarding other relevant social- and organizational-psychological phenomena associated with group interactions and teamwork. These include communication, mutual understanding of roles and responsibilities, the importance of adequate preparation for collaboration, and trust. Taken together, the results of this study will contribute to the LL process for the FPC component of EX FS12 and may be used to inform future iterations of the FPC as well as similar joint/WoG training efforts. The following summary and discussion highlights some of the most salient findings from the study.

4.1 Information Sharing, Planning, Coordination, and Collaboration at the FPC for EX FS12

The findings from this study were generally very positive regarding participant evaluations of the FPC for EX FS12. For instance, our study found that the vast majority of participants, both military and civilian, felt that the FPC was successful. In describing their experiences at the FPC, most participants felt that information sharing was adequate, that the WoG team had good communication, and that the team exchanged ideas freely. Military participants' perceptions of their experiences tended to be slightly more positive than civilians' perceptions, especially in regard to information sharing and communication. In terms of group interactions, most participants agreed that shared situational awareness was achieved and that the CAF and GPs were sufficiently aware of the roles, responsibilities, resources, and constraints of the other organizations. Moreover, participants believed that the goals of the different organizations overlapped and that their values were compatible. Although the ratings of military participants tended to be slightly higher than civilians' ratings on these issues, group differences were not statistically different. Such findings are encouraging given the challenges that can arise within WoG training related to different organizational goals and values (Olson & Gregorian, 2007; Patrick & Brown, 2007; Winslow, 2002).

Further, our results highlighted the importance of advanced preparation for maximizing the perceived success and usefulness of joint training opportunities such as the FPC. Notably, the majority of participants in this study, both military and civilian, felt well prepared for the FPC. This positive finding is perhaps not surprising given that most participants had participated in one or more WoG exercise or training/education opportunities prior to the FPC. Moreover, most participants had taken part in meetings leading up to the FPC, such as the MSEL development meeting, the MPC, or other planning sessions. Indeed, when asked to comment on what they had found useful as preparation for the FPC, participants specifically cited attending other planning conferences and events (such as the MPC or MSEL), reviewing planning documents, and interacting with other organizations. This finding is consistent with our previous research on WoG training (e.g., Thompson et al., 2011; Thompson et al., 2012) suggesting that joint training experiences can promote professional networks that in turn may facilitate future collaborations. Our previous research has also indicated the importance of being adequately prepared for joint training

(Thompson et al., 2011), that, in a sense, there is need for participants to be “trained for the training.” For example, participants should be provided information about other organizations prior to undergoing joint training.

In terms of perceptions of individual contributions at the FPC, the majority of respondents agreed that their roles and responsibilities were clear, their participation and experience were valued, their expertise was acknowledged, and they were able to influence the decisions and actions of the WoG team. These findings suggest a level of mutual respect at the FPC that is conducive to effective inter-organizational cooperation and collaboration (see Thomson, Adams, Hall, Brown, & Flear, 2011a). However, military participants tended to endorse these statements to a greater degree than did civilian participants. In particular, military participants were significantly more likely than civilian participants to feel that their expertise was acknowledged and their experience was valued. As well, the majority of participants agreed that the other organizations in the WoG team possessed characteristics suggesting trustworthiness —competence, motivation to facilitate the goals of the respondent’s organization, and reliability. Although military participants tended to provide higher ratings on these items than civilian participants, there were no statistically significant group differences in these areas. This suggests that some of the conditions for engendering inter-organizational trust may have been present at the FPC. In addition, most participants agreed that the WoG team fulfilled its roles and responsibilities, that its objectives, methods, and end state were clearly communicated and understood, and that the team built a good foundation for a positive future relationship. Once again, military participants’ average ratings were higher than those of civilian participants but were not significantly different.

All participants agreed that the FPC contributed to their understanding of GPs, and all but one participant agreed that the FPC contributed to their understanding of the CAF. However, the FPC contributed comparatively less to participants’ understanding of the US forces. Once again, the ratings of military participants were higher than those of civilian participants in these areas, but only in the latter case (regarding the US military) was the group difference statistically significant.

Notably, all participants agreed that the planning processes of the CAF and GP, even if not identical, were compatible. This finding is interesting in light of the fact that the OPP used by the CAF has sometimes been contrasted with the planning processes of other civilian organizations (see, for example, Thomson, Adams, Hall, Brown, & Flear, 2011b). Participants also agreed that the CAF and GP emergency plans were complementary. Further, all participants indicated that they were able to develop a common and unified approach to mission planning. However, military participants were significantly more likely than civilian participants to believe that the CAF and GP emergency plans were complementary. Military participants were also somewhat more likely than civilian participants to perceive that they were able to develop a common and unified approach to mission planning, with average differences between the two groups approaching statistical significance. However, there were no statistically significant differences between military and civilian participants in terms of whether the CAF and GP planning processes were seen as compatible.

In the present study, only a few participants expressed the view that they should have been more involved earlier in the planning process (e.g., at the IPC or the concept and objectives meeting). Given that civilian participants in our previous research (e.g., Ex MAPLE GUARDIAN; Thompson et al., 2011) recommended that they be included at an earlier stage of the exercise planning process, the results here are encouraging in that they indicate that most participants felt they were included at an appropriate stage in the planning process. Indeed, most of them had participated in previous planning sessions leading up to the FPC.

All respondents in this study agreed that, at least to some extent, the FPC took into account their organization's procedures, goals and objectives, values, mandates or roles, and communication style; all but one participant agreed that their organization's terminology was taken into account. Once again, the average ratings of military participants were higher than those of civilian participants for each of these aspects of organizational culture/structure. However, only the group difference regarding terminology approached statistical significance (military participants tended to endorse this item more strongly than civilian participants). These findings suggest that, at least in some respects, the FPC seemed to allow for an *integration* of two organizational cultures (military and civilian) rather than the complete *assimilation* of one culture to the other (see Berry, 1989). Such integration may provide the foundation for effective cooperation or collaboration rather than simply coordination (see Ankerson, 2004). Yet, when asked to describe the extent of their organization's collaboration within the WoG team, the majority of participants (12 of 21, or 57%) chose the term "coordinated while few (3 of 21, or 14%, all military) selected "integrated." These results suggest that, although aspects of both military and civilian organizational cultures were reportedly taken into account at the FPC, most participants perceived teamwork at the FPC as functioning at the level of coordination and less so at the level of integration.

4.2 Recommendations for Enhancing the FPC

As part of the survey, we also obtained participants' recommendations for enhancing future iterations of the FPC. For example, some participants suggested practical ways in which preparation for the FPC could be enhanced. These recommendations included having a common "place" (e.g., a SharePoint portal or website) for sharing information, such as contact lists or common products, or for posting current draft documents. Other recommendations included providing information upfront regarding the meaning of various acronyms, having an opportunity to review the exercise plan before the FPC, convening an overall preparation session, and holding smaller meetings with specialized discussions prior to the FPC. Similarly, when asked what aspects of the FPC were successful or unsuccessful, some participants noted that the FPC could be improved by providing certain materials to participants in advance of the meeting, such as a list of acronyms, a draft MSEL, the exercise concept, and the agenda. Such recommendations speak to the importance of advanced preparation for joint training in order to maximize its usefulness to participants.

Participants made several suggestions concerning improvements to the planning process such that the planning needs and requirements of all WoG organizations are assured. These included holding a table top exercise as a final coordination, distributing materials, and enhancing knowledge of OGDs, all prior to the meeting. These recommendations reflect once again the importance of advanced preparation. Other recommendations focused on using smaller group sizes for meetings, and on maintaining agreements and commitments throughout the planning process (i.e., not changing these later in the process).

Participants also provided practical recommendations or strategies for facilitating future WoG collaboration in terms of training/education and policy improvements. Recommendations for training and education from military participants included (a) providing training at least once a year, (b) incorporating full-scale, table top and command post exercises into training as well as staff discussions, and (c) emphasizing in training courses that "no agency works in isolation." Recommendations from civilian participants included (a) providing more opportunities to work together and to understand the roles of each organization (including exchanging overviews of GPs' organizations), (b) developing an acronym dictionary and sharing this in advance of meetings, and (c) distributing materials (e.g., draft MSEL) beforehand.

Policy-related recommendations for facilitating WoG collaboration included (a) creating a document that explains the roles, responsibilities, missions, mandates, and generic functions of each organization, and (b) establishing a process for outlining various aspects of the meeting (e.g., its aim, objectives, legal and union constraints, etc.). Both recommendations came from military participants.

4.3 Conclusions

The present study contributes to both practical and scientific knowledge on comprehensive operations by assessing perceptions of CAF and GP participants in the FPC for EX FS12. Specifically, a paper-and-pencil survey was used to assess perceptions of opportunities afforded at the FPC for information sharing, planning, coordination, and collaboration. Overall, our survey results indicated that the FPC was viewed positively by both military and civilian participants in terms of planning, information sharing, collaboration, and coordination. However, as noted above, some differences in the views of military and civilian respondents were evident. In most of these instances, military respondents held relatively more positive views than civilian respondents. Given the small sample sizes, such differences must be interpreted with caution and are subject to validation in future research. Yet, this general trend of more positive attitudes on the part of military as opposed to civilian participants in joint (interagency) training has been found in our previous research as well (e.g., Thompson et al., 2011) and warrants further research. In particular, future research should examine the extent to which joint/WoG training opportunities reflect an integration of both civilian and military organizational cultures, as well as the extent to which both military and civilian participants in such training activities feel that their expertise and experience is valued.

This study contributes to the development of a systematic understanding of participant perceptions related to joint training exercises within the JIMP/CA paradigm and, specifically, the FPC for EX FS12. Findings from this research will inform and improve future iterations of the FPC as well as, potentially, other similar WoG/interagency planning meetings within a CA context. More broadly, the research contributes to a greater understanding of the key social- and organizational-psychological issues that affect collaboration in a comprehensive environment. This will improve the ability of decision makers to address issues based on systematic feedback from the people who do the jobs and to improve planning and training for these contexts, thus enhancing the probability of mission success. Overall, the study generates information on how we can best tailor training and education to optimize WoG missions. As well, it identifies strategies for effective collaboration between the CAF and non-military actors, including the development of training and education tools (e.g., best practices, lessons learned, etc.). In so doing, this research contributes to a larger DRDC Toronto research program investigating the effectiveness of joint training as preparation for CA missions, and thus enhances our understanding of civil-military relationships within the JIMP/CA/WoG context.

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Annex A Information Sheet—Survey

PLEASE READ THIS PAGE CAREFULLY. FEEL FREE TO KEEP THIS GENERAL INFORMATION SHEET.

Background	Defence R&D Canada - Toronto (DRDC Toronto) is a human sciences laboratory within DRDC, an agency within DND. DRDC - Centre for Operational research and Analysis (DRDC CORA) is an operational research centre within DND providing decision support for operations. The following questions support two research projects whose overall objectives are to understand the key social and organizational issues that affect working within the comprehensive approach to operations (e.g., involving the Canadian Forces and governmental partners). One aspect of these two projects is to explore the impact of integrated training opportunities, such as Exercise Frontier Sentinel 2012 (FS 12).		
Benefits include improving the ability of decision makers to address specific training-related issues based on systematic feedback from the people who do the jobs, and to improve education and training for comprehensive missions.		
The Questionsask you to consider a few questions concerning your background and experience. We then ask questions directly related to your training experience in the Final Planning Conference (FPC) for FS 12. Some of these questions ask for a rating and then provide space for comments related to specific questions. We expect that the survey will take about 20 minutes to complete. By completing this survey you are indicating your consent to participate in this study. There are no right or wrong answers to these questions. People may have differing views and we are interested in what your experiences are.		
Your Rights as a Participant:	<ol style="list-style-type: none"> 1. Your answers are anonymous and confidential and your participation is completely voluntary. 2. Only authorized researchers will have access to the data and only group results are presented. 3. You may skip individual questions and can end your participation at any time. 4. Your answers will be assigned a unique identification number. 5. The Directorate of Access to Information and Privacy (DAIP) is required by law to screen data to ensure that individual identities are not disclosed, prior to releasing any information request filed under the Access to Information Act or the Privacy Act. 		
Potential Risks:	There are no known risks associated with this study beyond minor eyestrain and boredom. However, participation in this study, or indeed any research, may involve risks that are currently unforeseen by DRDC.		
Who can I contact with any additional questions or comments?	The Co-Investigator, Ms. Adrienne Turnbull, DRDC CORA, will be present at the FPC for FS 12 to answer your questions. You may also contact the project managers (listed below) at any time during or subsequent to the FPC.		
DRDC Toronto Project Managers	<table> <tr> <td>Dr. Megan M. Thompson, PhD Interagency Trust Project Megan.Thompson@drdc-rddc.gc.ca 416-635-2040 Co-Investigator</td> <td>Dr. Angela R. Febbraro, PhD JIMP Essentials in the Public Domain Angela.Febbraro@drdc-rddc.gc.ca 416-635-2000 Ext. 3120 Principal Investigator</td> </tr> </table>	Dr. Megan M. Thompson, PhD Interagency Trust Project Megan.Thompson@drdc-rddc.gc.ca 416-635-2040 Co-Investigator	Dr. Angela R. Febbraro, PhD JIMP Essentials in the Public Domain Angela.Febbraro@drdc-rddc.gc.ca 416-635-2000 Ext. 3120 Principal Investigator
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DRDC Human Research Ethics Review	This research has been reviewed, approved and given the ethics protocol number L-729, Amendment #2, by the DRDC Human Research Ethics Committee, Dr. Jack Landolt, Chair, who may be reached at 416-635-2120; jack.landolt@drdc-rddc.gc.ca). The research has been coordinated by the Director General Military Personnel Research and Analysis (DGMPPRA) Social Science Research Review Board, in accordance with CANFORGEN 198/08. The Coordination number is 1078/12-N.		

WE APPRECIATE YOUR INPUT AND ASK THAT YOU BE AS HONEST AS POSSIBLE SO THAT OUR INFORMATION ACCURATELY REFLECTS YOUR BACKGROUND AND EXPERIENCE.

Annex B EX FS12 FPC Survey

- 1a. Gender: Male Female 1b. Age: 8-24 25-34 35-44 45-54 55+
2. I am currently working for:
 a Government Partner (GP)
 the Canadian Forces (CF)
 Other (please specify: _____)
3. How many times have you participated in a Whole-of-Government / WoG (CF + GP) exercise:
 0 1 2 3 4 or more
4. How many times have you previously participated in WoG (CF + GP) training or education:
 0 1 2 3 4 or more times
5. Did you participate at (check all that apply):
 the IPC ? the MPC? the MSEL development? Any other planning session?
6. Will you be participating in the FS Exercise? Yes No
 If yes... As part of the blue team? As part of the white cell? Other?

Pre-planning

7. Did you feel adequately prepared for this FPC?
 Not at all A little Somewhat Mostly Completely
8. What did you find useful as preparation? _____

9. What else would you have found useful as preparation? _____

Experiences at the FPC

10. Please rate your agreement with the following statements as they relate to **your experiences at the FPC**.
 Please provide additional comments where possible.

	Strongly disagree	Disagree	Slightly disagree	Slightly agree	Agree	Strongly agree	Comments
a. From my perspective, the FPC was successful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
b. My role and responsibilities were clear.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
c. Overall, I am confident that the WoG team fulfilled its roles and responsibilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
d. Information sharing was adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
e. Shared situational awareness was achieved.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

	Strongly disagree	Disagree	Slightly disagree	Slightly agree	Agree	Strongly agree	Comments
f. The CF was sufficiently aware of the roles, responsibilities, resources, and constraints of the GPs during the FPC.	0	0	0	0	0	0	
g. The GPs were sufficiently aware of the roles, responsibilities, resources, and constraints of the CF during the FPC.	0	0	0	0	0	0	
h. The WoG team's objectives, methods, and end state were clearly communicated and understood.	0	0	0	0	0	0	
i. My participation was valued.	0	0	0	0	0	0	
j. My expertise was acknowledged.	0	0	0	0	0	0	
k. My experience was valued.	0	0	0	0	0	0	
l. I felt as though I was able to influence the decisions made and actions taken.	0	0	0	0	0	0	
m. I have faith in the abilities of the other organizations in the WoG team.	0	0	0	0	0	0	
n. The other organizations in the WoG team is motivated to facilitate the goals of my organization.	0	0	0	0	0	0	
o. The other organizations in the WoG team is reliable.	0	0	0	0	0	0	
p. The WoG team built a good foundation for a positive future relationship.	0	0	0	0	0	0	
q. The WoG team had good communication.	0	0	0	0	0	0	
r. The WoG team exchanged ideas freely.	0	0	0	0	0	0	
s. My organization's goals overlap with the rest of the WoG team.	0	0	0	0	0	0	
t. My organization's values are generally compatible with the values of the WoG team.	0	0	0	0	0	0	

11.

	Not at all / None	A little	Some/ Somewhat	A great deal	Extensively / Completely	Comments
Do you feel that the FPC took into account your organization's approach to:						
a. Procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
b. Goals and objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
c. Values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
d. Mandates or roles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
e. Communication style	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
f. Terminology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

12.

	Not informed / included	Informed (organization involved at information level only)	Cooperated (organization provided or received information that influenced own plans)	Coordinated (organization actively sought and received information from rest of WoG team, and was actively included by rest of WoG in the information process)	Integrated (organization fully integrated into planning, operational execution, information sharing, situational updates, etc.)	Comments
Please indicate the term that best defines the collaboration of your organization within the WoG team:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

13. Do you feel that you should have been more involved earlier in the planning process? Yes No

14. If so, when? _____

How? _____

15.

	Not at all / None	A little	Some/ Somewhat	A great deal	Extensively / Completely	Comments
a. Were the CF and GP planning processes compatible?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
b. Do you believe the respective emergency plans are complementary?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
c. When planning with other departments, were you able to develop a common and unified approach to mission planning?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

16.

	Not at all / None	A little	Some/ Somewhat	A great deal	Extensively / Completely	Comments
Did this FPC contribute to your understanding of:						
a. Government Partners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
b. Canadian Forces	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
c. U.S. Forces	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

17. How can the planning process be improved in Whole-of-Government (WoG) operations to ensure inclusion of the planning needs and requirements of all departments or organizations?

18. Do you have any recommendations that might facilitate WoG collaboration in future?

Training: _____

Policy: _____

Education: _____

Other: _____

19. Was there anything that was successful, or unsuccessful, about the FPC that you have not already mentioned?

Thank you very much for your participation.

Please return your completed survey to Ms. Turnbull.

Annex C Qualitative Responses

What did you find useful as preparation?

Military	Civilian
Attending MPC / Scenario writing board	Reviewing various planning documents
Calling message	Attendance at all planning events and communication with other organizations
Constant contact with JTFA	Invite admin
Interaction with other players in my field, and discussions focused on my small piece of the Ex	It was useful to plan in small groups and then come together to see how everything fits together
Last minute coordination and confirmation	Lots of planning time, sufficient and ample time to ask questions and work the gremlins out
MPC	MSEL, Planning conferences, working groups
Timeline information at MSEL	MSEL writing board
	Admin order
	Planning / going step-by-step
	Preliminary discussions

What else would you have found useful as preparation?

Military	Civilian
Agenda in calling message	A community or place for contact lists and common products -> like a sharepoint portal
Common website for posting current draft documents	A list of MSELs
Going through the MSEL which covers the entire exercise. A table top exercise might have been a good addition	Break down to smaller groups who will actually interact together
Since we were reviewing the ExPlan we could have likely done it quicker if we had been given a copy before the FPC with instructions to come to the mtg with our recommended suggestions	More explanation on what certain acronyms are
Smaller meeting with specialised discussion	Overall prep session
	Preliminary exercise plan (i.e. draft)
	Previous versions of line by line wargame

Do you feel that you should have been more involved earlier in the planning process? If so, when? And how?

Military	Civilian
From the concept and objectives meeting, this was not a fault of anyone from Canada	IPC, early decisions
IPC	General info on exercise coming up

How can the planning process be improved in WoG operations to ensure inclusion of the planning needs and requirements of all departments or organizations?

Military	Civilian
	It would have been helpful to have emailed the newest editions of work done as time went on
All partners need to be planning to get there from start to finish	Less assumptions on state of knowledge of other WoG acronyms and inter relationships
Early commitments and agreements are not changing either during process	Not sure - I really think CF did a great job and was grateful for their knowledgeable and experienced guidance
There is a requirement to have a table top exercise prior to exercise day as a final coordination	Pre-distribute some materials - ExCon draft form for contacts, draft MSEL
	We all have some knowledge of other government departments but it could be better
	While meetings are helpful, the size of these meetings sometimes made it difficult to share ideas or garner understanding on some topics

Do you have any recommendations that might facilitate WoG collaboration in Future?

Training:

Military	Civilian
At least once a year as a mandate	Generate an acronym dictionary
Use full scale exercises, table top and command post exercises as well as staff discussions	More opportunities to work together and understand the roles of each agency

Education:

Military	Civilian
Keep the consistency of having one exercise a year	Sharing an acronym list in advance of meetings
When training / educating staff ensure they understand that no agency works in isolation	

Policy:

Military	Civilian
To possibly create a document explaining roles, responsibilities, missions, mandates and generic functions of each organization	
Work such that information can be released versus working under a no release policy just to cover one's ass	

Other:

Military	Civilian
Early in process have meetings(s) outlining aim, objectives, constraints, legal, union	Perhaps opportunities for various GPs to present overviews of the above to each other
	Pre-distribute some materials - ExCon draft form for contacts, draft MSEL

Was there anything that was successful, or unsuccessful, about the FPC that you have not already mentioned?

Military	Civilian
As with most planning meetings or conferences, the "side bar" conversations amongst the different groups always generate interesting/useful information exchange	As a civilian, the large number of acronyms is a problem. However, people were very helpful to give definitions.
Thanks - good conference as I finalised the details	I did come away with some issues identified for my agency to action, which is good, but it does mean that the FPC is maybe not so "final"
Thank you very much for a hospitable experience. The lodging galley was great and the refreshments in the meetings were great too.	Pre-distribute some materials - ExCon draft form for contacts, draft MSEL
We did not get the agenda prior to the meeting. It would have been helpful.	Working through the MSEL (spelled MEASEL on the form, but we worked on the MSEL, pronounced the same way) is very successful and should iron out any items missed before implementation

Annex D Frequency Distributions

Experiences at the FPC	D	SD	SA	A	StA	N	M	SD	t	p
From my perspective, the FPC was successful.	0	0	1	14	5	20	5.20	.52	.849	.407
My role and responsibilities were clear.	0	0	1	16	4	21	5.14	.48	.497	.628
Overall, I am confident that the WoG team fulfilled its roles and responsibilities.	0	0	1	15	4	20	5.15	.49	1.406	.177
Information sharing was adequate.	0	0	3	11	7	21	5.19	.68	2.166	.043
Shared situational awareness was achieved.	0	0	4	12	5	21	5.05	.67	1.728	.100
The CF was sufficiently aware of the roles, responsibilities, resources, and constraints of the GPs during the FPC.	0	0	5	14	2	21	4.86	.57	1.094	.188
The GPs were sufficiently aware of the roles, responsibilities, resources, and constraints of the CF during the FPC.	0	0	4	14	2	20	4.90	.55	1.710	.107
The WoG team's objectives, methods, and end state were clearly communicated and understood.	1	2	2	15	1	21	4.62	.92	.853	.404
My participation was valued.	0	0	8	10	3	21	4.76	.70	1.535	.141
My expertise was acknowledged.	0	1	6	12	2	21	4.71	.72	2.692	.014
My experience was valued.	0	1	6	12	2	21	4.71	.72	2.692	.014
I felt as though I was able to influence the decisions made and actions taken.	0	0	7	9	5	21	4.90	.77	1.765	.094
I have faith in the abilities of the other organizations in the WoG team.	0	2	2	14	3	21	4.86	.79	.805	.434
The other organizations in the WoG team are motivated to facilitate the goals of my organization.	0	1	2	16	2	21	4.90	.63	.656	.519
The other organizations in the WoG team are reliable.	0	0	2	16	3	21	5.05	.50	.451	.657
The WoG team built a good foundation for a positive future relationship.	0	1	0	12	8	21	5.29	.72	1.330	.199
The WoG team had good communication.	0	0	4	12	5	21	5.05	.67	2.616	.017
The WoG team exchanged ideas freely.	0	0	3	11	7	21	5.19	.68	1.377	.185
My organization's goals overlap with the rest of the WoG team.	1	1	6	11	1	20	4.50	.89	.750	.463
My organization's values are generally compatible with the values of the WoG team.	0	0	4	14	3	21	4.95	.59	1.100	.285

D = Disagree; SD = Slightly Disagree; SA = Slightly Agree; A = Agree; StA = Strongly Agree

Do you feel that the FPC took into account your organization's approach										
	N	AL	S	AGD	E/C	N	M	SD	t	p
Procedures	0	0	9	9	2	20	3.65	.67	.672	.456
Goals and objectives	0	0	4	13	3	20	3.95	.61	.361	.722
Values	0	0	6	12	3	21	3.86	.66	.951	.353
Mandates or roles	0	1	5	11	4	21	3.86	.79	.780	.445
Communication style	0	1	6	11	3	21	3.76	.77	.211	.835
Terminology	1	3	5	11	1	21	3.38	.97	2.02	.058

N = Not at all/None; AL = A little; S = Somewhat; AGD = A great Deal; E = Extensively/Completely

Planning										
	N	AL	S	AGD	E/C	N	M	SD	t	p
Were the CF and GP planning processes compatible?	0	0	10	11	0	21	3.52	.51	.198	.845
Do you believe the respective emergency plans are complementary?	0	1	8	10	1	20	3.55	.69	2.187	.042
When planning with other departments, were you able to develop a common and unified approach to mission planning?	0	0	8	11	2	21	3.71	.64	2.098	.050

N = Not at all/None; AL = A little; S = Somewhat; AGD = A great Deal; E = Extensively/Completely

Did this FPC contribute to your understanding of:										
	N	AL	S	AGD	E/C	N	M	SD	t	p
GPs	0	0	8	11	2	21	3.71	.64	.572	.574
CF	1	0	6	11	3	21	3.71	.90	.406	.689
US Forces	1	4	7	7	2	21	3.24	1.04	3.438	.003

N = Not at all/None; AL = A little; S = Somewhat; AGD = A great Deal; E = Extensively/Completely

List of symbols/abbreviations/acronyms/initialisms

ARP	Applied Research Project
C2F	Commander Second Fleet
CA	Comprehensive Approach
CAA	Commander, United States Coast Guard Atlantic Area
CAF	Canadian Armed Forces
CANCOM	Canada Command
CBSA	Canada Border Services Agency
CSC	Correctional Service of Canada
DFO	Department of Fisheries and Oceans
DGMPRA	Director General Military Personnel Research and Analysis
DLCD	Director of Land Concepts and Designs
DND	Department of National Defence
DRDC	Defence R&D Canada
DRDC CORA	Defence R&D Canada, Centre for Operational Research and Analysis
DRDC Toronto	Defence R&D Canada, Toronto Research Centre
DRDKIM	Director Research and Development Knowledge and Information Management
4 ESR	4 Engineer Support Regiment
EX	Exercise
FPC	Final Planning Conference
FSE	Full Scale Exercise
EX FS12	Exercise FRONTIER SENTINEL 2012
GP	Government Partner
IO	International Organization
IPC	Initial Planning Conference
JIMP	Joint, Interagency, Multinational, Public
JTFA	Joint Task Force Atlantic
LANTAREA	United States Coast Guard Atlantic Area
LIVEX	Live Exercise
LL	Lessons Learned

MARLANT	Maritime Forces Atlantic
MPC	Main Planning Conference
MSEL	Master Scenario Events List
NMCM	Naval Mine Counter Measures
NORAD N-C	North American Aerospace Defense Command Northern Command
NS Dept H&W	Nova Scotia Department of Health and Welfare
NGO	Non-Governmental Organization
OPI	Officer of Primary Interest
OGDs	Other Government Departments
OP Plan	Operational Plan
OPP	Operational Planning Process
PHAC	Public Health Agency of Canada
RCMP	Royal Canadian Mounted Police
RFI	Requests for Information/Intelligence
SWB	Scenario Writing Board
TC	Transport Canada
US	United States
USCG	United States Coast Guard
USFF	United States Fleet Forces
WoG	Whole of Government

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13. **ABSTRACT** (A brief and factual summary of the document. It may also appear elsewhere in the body of the document itself. It is highly desirable that the abstract of classified documents be unclassified. Each paragraph of the abstract shall begin with an indication of the security classification of the information in the paragraph (unless the document itself is unclassified) represented as (S), (C), (R), or (U). It is not necessary to include here abstracts in both official languages unless the text is bilingual.)

This study investigated participant evaluations of the Final Planning Conference (FPC) for Exercise FRONTIER SENTINEL 2012 (EX FS12), one of a series of planning meetings that was held in preparation for EX FS12 proper, a “Whole-of-Government” (WoG) or interagency exercise, in order to provide opportunities for partners and stakeholders to consult with one another in the development of exercise plans. The present study was designed to contribute to the Lessons Learned (LL) process for this FPC and to enhance the exercise planning process. Twenty-one participants (11 civilians representing Canadian government agencies/departments and 10 military personnel, including seven from the Canadian Armed Forces and three from the United States military) completed a survey that assessed perceptions of the FPC in terms of opportunities afforded for information sharing, planning, coordination, and collaboration. Results indicated that the vast majority of participants, both civilian and military, felt that they were well prepared for the FPC and that the FPC was a success. Most felt that information sharing was adequate and that ideas were exchanged freely; most agreed that the planning processes of the military and civilian organizations were compatible and that participants were able to develop a common and unified approach to mission planning; and all agreed, to some extent, that the FPC took into account their respective organization’s procedures, goals and objectives, values, mandates or roles, and communication style. In describing the extent of their organization’s collaboration within the WoG team, most participants chose the term “coordinated,” whereas a few participants chose the term “cooperated,” “integrated,” or “informed.” However, in some areas, military participants’ assessments were slightly more positive than those of civilian participants (e.g., military participants were significantly more likely than civilian participants to report that their expertise and experience were valued), although such differences must be interpreted with caution, given small sample sizes. In addition, participants offered recommendations for training, education, and policy relevant to future iterations of the FPC. In addition to contributing to the LL process for the FPC component of EX FS12 and enhancing the exercise planning process, the present findings help to address a gap in knowledge about the perceived effectiveness of joint training for WoG/interagency or comprehensive operations and thus may be used more generally to enhance training activities within a comprehensive context.

La présente étude traite de l’évaluation que des participants ont réalisée sur la Conférence de planification finale (CPF) de l’exercice FRONTIER SENTINEL 2012 (EX FS12), l’une des rencontres de planification préparatoires à l’EX FS12, un exercice pangouvernemental ou interorganismes visant à donner l’occasion aux partenaires et aux intervenants de se consulter sur l’élaboration de plans d’exercice. L’étude a été conçue pour contribuer au processus des leçons retenues (LR) de cette CPF et pour améliorer le processus de planification des exercices. Vingt-et-un participants (onze civils représentant des organisations/ministères du gouvernement canadien et dix militaires, dont sept des Forces armées canadiennes et trois des forces armées des États-Unis) ont évalué les perceptions de la CPF en matière de partage et de planification des renseignements ainsi que de coordination et de collaboration. Les résultats indiquent que la grande majorité des participants, civils et militaires, estiment avoir été bien préparés pour la CPF et que celle-ci a été une réussite. La plupart considèrent que le partage des renseignements a été adéquat et que les idées ont circulé librement. La plupart estiment que les processus de planification des organisations civiles et militaires étaient compatibles et que les participants ont été en mesure de développer une démarche commune et unifiée pour la planification d’une mission. Tous conviennent, dans une certaine mesure, que la CPF a tenu compte des procédures, des buts et objectifs, des valeurs, des mandats ou des rôles et du style de communication de leur organisation respective. Pour décrire la portée de la collaboration de leur organisation au sein de l’équipe pangouvernementale, la plupart des participants ont choisi le terme « coordonnée » et quelques-uns, le terme « en coopération », « intégrée » ou « informée ». Toutefois, dans certains domaines, l’évaluation des participants militaires a été légèrement plus positive que celle des participants civils (p. ex., les participants militaires ont eu beaucoup plus tendance que les participants civils à affirmer que leur expertise et leur expérience étaient précieuses), bien qu’il faille prendre ces écarts avec prudence compte tenu du fait que l’échantillonnage était relativement petit. Les participants ont également formulé des recommandations relatives à l’instruction, à l’éducation et à la politique propres à la tenue de prochaines CPF. Outre la contribution au processus de LR de l’élément CPF de l’EX FS12 et l’amélioration du processus de planification des exercices, les présentes conclusions aident à combler certaines lacunes à propos de l’efficacité perçue de l’instruction combinée relative à des opérations pangouvernementales/interorganisationnelles ou générales et peuvent ainsi être utilisées de façon plus exhaustive pour améliorer les activités d’instruction dans un contexte global.

14. **KEYWORDS, DESCRIPTORS or IDENTIFIERS** (Technically meaningful terms or short phrases that characterize a document and could be helpful in cataloguing the document. They should be selected so that no security classification is required. Identifiers, such as equipment model designation, trade name, military project code name, geographic location may also be included. If possible keywords should be selected from a published thesaurus, e.g. Thesaurus of Engineering and Scientific Terms (TEST) and that thesaurus identified. If it is not possible to select indexing terms which are Unclassified, the classification of each should be indicated as with the title.)

Whole of Government; Comprehensive Approach; JIMP; interagency training; Exercise Frontier Sentinel

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