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**MASTER OF DEFENCE STUDIES
RESEARCH PROJECT**

**IMPOSED RESTRICTION:
PANACEA OR PROBLEM?**

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ABSTRACT

Canadian demographic trends are showing that the quest for talent is becoming more and more competitive in the workplace. Birth rates are decreasing, as is the rate of population growth in Canada. At this same time, the average age of the population is increasing and larger numbers of people are leaving the workforce. These factors have combined to create a highly competitive environment for talent between public and private sector employers in Canada. Organizations are placing greater importance on attracting new talent, and retaining talent that they already have. This trend is not exclusive to the private sector, and has been acknowledged by the Canadian Forces. This paper will show that Canadian Forces imposed restriction policy is sound and should be maintained as a retention tool for Canadian Forces members. The paper will do this by defining key terms related to imposed restriction, explaining the general purpose behind this particular human resource policy and confirming if the purpose is still being achieved. It will examine the numbers around this policy, to include data about imposed restriction users as well as the financial costs of the policy. The paper will then examine the cost-effectiveness of the policy both on an individual and a macro level. The paper will then go on to compare Canadian Forces policies to those of other militaries in order to determine its consistency compared to our allies. The paper will consider private sector practices to determine if it is comparable to these private-industry standards. It will finish by looking at key conclusions drawn from the paper in order to identify possible policy gaps in the existing Canadian Forces imposed restriction with a view to improving the effectiveness and efficiency of the current imposed restriction policy.

CHAPTER 1 - INTRODUCTION

Canadian demographic trends are showing that the quest for talent is becoming more and more competitive in the workplace. Birth rates are decreasing, as is the rate of population growth in Canada. At this same time, the average age of the population is increasing and larger numbers of people are leaving the workforce. These factors have combined to create a highly competitive environment for talent between public and private sector employers in Canada. As a result, organizations are placing greater importance on attracting new talent, and retaining talent that they already have. This trend is not exclusive to the private sector, and has been acknowledged by public sector employers as well, including in Canada and the Canadian Forces.

While the overall size of the Canadian workforce (those aged 15-64) has continued to grow over the past fifty years, the demographic breakdown among Canadians of working age has not remained consistent. In particular, the proportion of workers between the ages of 55 to 64 grew from 2.87 million to 3.67 million persons between 2001 and 2006, an increase of 28 percent.¹ Because of this, while the number of workers in Canada has never been greater, 3.7 million workers out of a working population of 21.7 million Canadians of working age (or 16.9 % of the working population) is over the age of 55, the highest this ratio has ever been. The expectation is that the number of Canadians aged 55 to 64 will continue to grow and by 2016 could represent over 20 % of the Canadian working-age population.² According to Statistics

¹ Statistics Canada, *Portrait of the Canadian Population in 2006, by Age and Sex, 2006 Census, Age and Sex, 2006 Census, Census Year 2006* (Ottawa: Minister of Industry, 2007), 11.

Canada, by 2016, Canada may have more people reaching an age where they can leave the workforce than those reaching the age to enter it. Using the idea that those in the 16-24 year old age group make up those entering the workforce and those in the 55-64 year old age group represent those about to leave the workforce, in 2006, there were still 4.01 million people entering the workforce to 2.87 million persons leaving the workforce (for a ratio of 1.4 persons entering for every person leaving).³ Finally, the median age of Canadians has been rising steadily since 1966 and as of 2006 sat at 39.5, up 1.9 years from the previous census (2001), and this age is expected to continue increasing, possibly reaching as high as 44 years by 2031.⁴ Figure 1 illustrates the breakdown of population by various age ranges. These demographic changes indicate that Canadian employers may face a number of challenges in the future particularly in areas such as increased employee turnover. Employee retention and recruiting will likely become even more challenging in the future than they already are at the current time.

² *Ibid.*, 12.

³ *Ibid.*, 12.

⁴ *Ibid.*, 8.

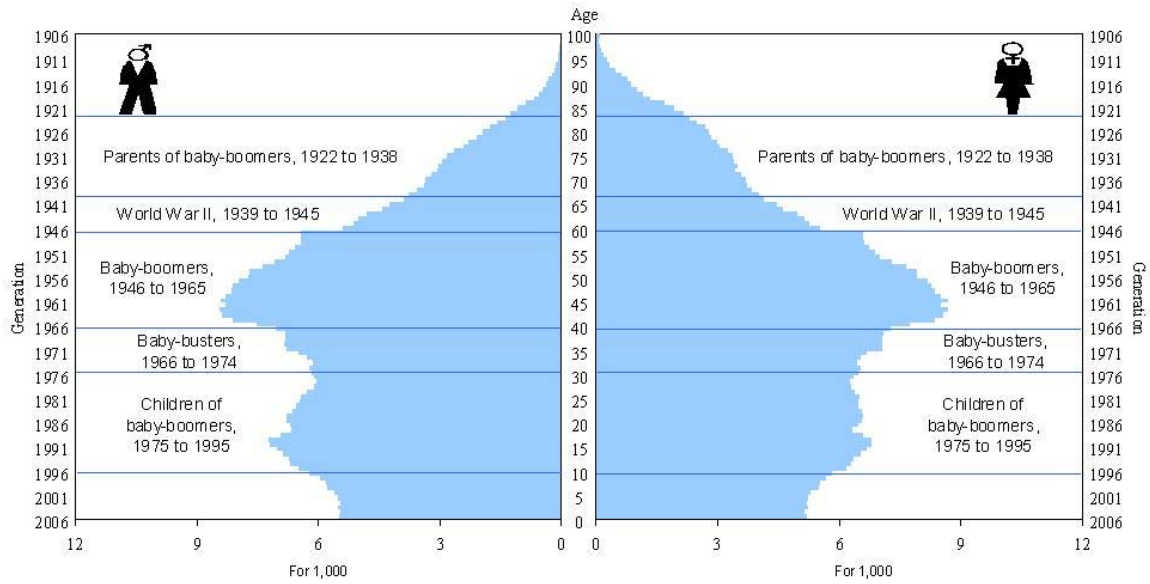


Figure 1 – Statistics Canada, 2006 Census

The Canadian Forces are not immune to these demographic trends. Over the years, the Canadian Forces has conducted its own research to determine possible impacts that these national demographic changes could have on military enrolment and retention. When considering these changes, some of the implications for the Canadian Forces include a decrease in the size of the traditional recruit pool, which had seen the military depend upon “homogenous community based involvement”.⁵ The traditional Canadian Forces applicant was fit, young (17-24), male, rural, white, with some prior military exposure and with a high school education (or sometimes less). In order to successfully recruit and retain quality personnel in the future, the status of the military profession must be enhanced in such a way as it becomes not a career of choice, but a profession of

⁵ T. Wait, *Canadian Demographics and Social Values at a Glance: Impact on Strategic HR Planning*, Report Prepared for the Department of National Defence (Ottawa: Directorate of Strategic Human Resource Coordination, 2002), 12.

choice.⁶ It must draw on a wider cross-section of the population and must improve its representativeness of the Canadian population.

While the Canadian Forces have grown slowly over the past few years, this growth has been accompanied by a steady increase in the average age of Canadian Forces members. While in 1997 the average age of Canadian Forces members was slightly over 31, by 2009 this number had reached slightly over 34 years of age, and it is projected to continue increasing for the foreseeable future.⁷ Additionally, the Canadian Forces has been dealing with a demographic bubble related to years of service the result of a disastrous force reduction program in the early 1990's.⁸ The number of personnel in their 18th to 20th year of service is greater than what would be regarded as optimal, while the numbers of personnel between 7 and 15 years of service is significantly lower than what is necessary to maintain the numbers of personnel required with certain levels of experience.⁹ Figure 2 provides a graphical representation of this shortfall, based on numbers current as of March 2008.

⁶ *Ibid.*, 25.

⁷ Brigadier-General J.Madower, "Dimensions and Demographic Challenges of Canadian HR & Their Effects on the CF," Lecture, Canadian Forces College (Toronto ON, November 30, 2009), slide 18.

⁸ Jeff Tasseran, "Military Manning and the Revolution in Social Affairs," *Canadian Military Journal* 2 no.3 (Autumn 2001): 54.

⁹ *Ibid.*, slide 27.

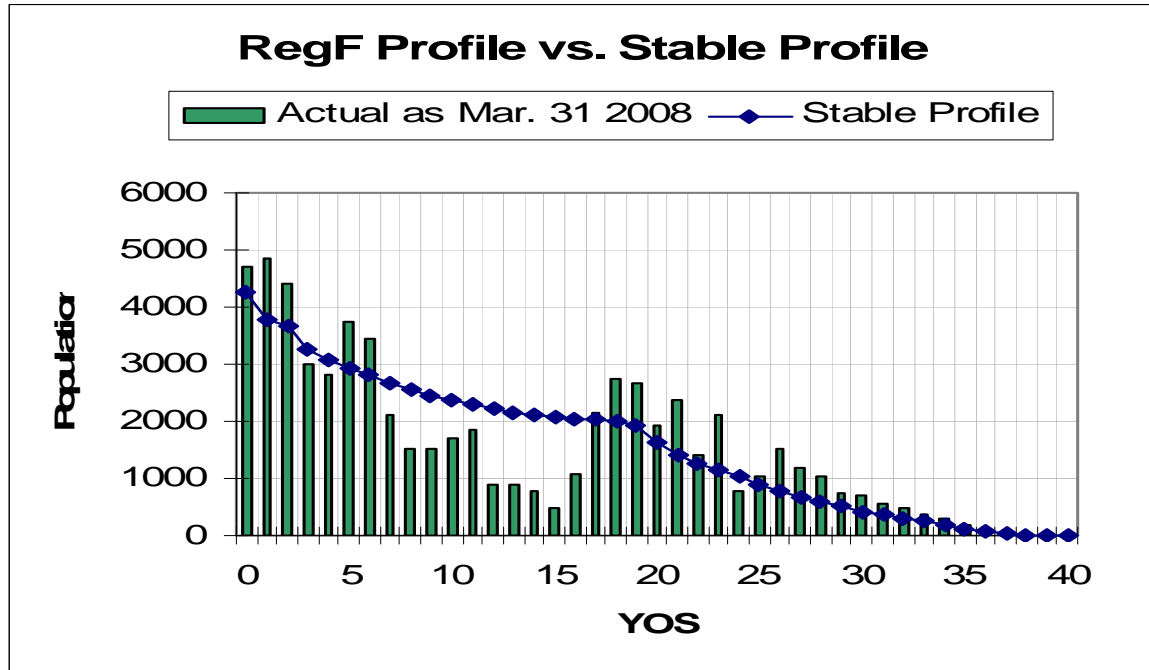


Figure 2 – Human Resource Management System Data March 2006

An additional demographic trend, the increasing numbers of dual-income families in Canada are leading military spouses and partners to expect and want to be suitably employed should they so desire. Dual income families are becoming more and more the norm because of factors such as the rising cost of living and the desire for both partners to achieve fulfillment in their employment after reaching their educational goals.

Concurrent with this trend, the Canadian Forces career management system continues to maintain the continual movement of its personnel through postings, leading to potential for conflict within Canadian Forces families as it relates to employment opportunities for military members' spouses.¹⁰

¹⁰ Julie Coulthard and Jason Dunn, *Canadian Forces Spousal/Partner Employment and Income Project: Research Framework and Methodology*, Report Prepared for Chief of Military Personnel (Ottawa: Director General Military Personnel Research and Analysis, 2009), 1.

The leadership of the Canadian Forces has noted these demographic changes in both the Canadian population at large and within the Canadian Forces, and has taken steps to address the challenges that will be faced in the coming years. The Canada First Defence Strategy has recognized people as being one of the four pillars of the new strategy, along with equipment, readiness, and infrastructure. The Canada First Defence Strategy goes further to identify personnel as Defence's most important resource and as the key pillar to the strategy. Within the personnel pillar, both the recruiting and the retention of "quality candidates that reflect the face of Canada"¹¹ are identified as critical objectives, particularly when taking into consideration the demographic challenges facing the Canadian workforce in the coming years. The Canadian Forces Military Personnel Retention Strategy acknowledges four key issues affecting the Canadian Forces' personnel-generation requirements. These four issues include the strong competition in the civilian labour market as a result of the increasing numbers of Canadians reaching retirement age, the distortion in Canadian Forces years of service due to an unusually large long-service population and an unusually small mid-career population, the difficulty in achieving work-life balance for Canadian Forces members due to shortages of trained personnel and high perstempo, and the fact that the Canadian Forces recruiting and training systems are operating close to or at capacity.¹² This strategy is looking at de-

¹¹ Department of National Defence, *Canada First Defence Strategy* (Ottawa: Chief of Defence Staff, 2008),

¹² Major-General W.Semianiw, *Military Personnel Retention Strategy*, (National Defence Headquarters: file 5000-1(CMP), 19 July 2009), 2/10.

emphasizing financial incentives and focusing greater effort and resources on strengthening members' commitment to the Canadian Forces.¹³

In order for the Canadian Forces to remain competitive in this demographic environment, personnel management policies are being modernized in order to create a working environment that is capable of attracting and retaining Canadian Forces members. The objectives towards which these policies are developed are detailed in Chief of Military Personnel's "Military HR Strategy 2020". This document defines the Military Human Resource mission as being "to develop and implement HR plans, policies and programs to recruit, develop and retain people to effectively support the CF in all operations it is asked to perform"¹⁴. There are a dozen human resource objectives identified in the Canadian Forces HR Strategy. These include leadership, culture, communication, and consultation. They also include such objectives as retention, recruitment, transition, well-being and health (among others). Finally, it lists professional development and human resource systems as its last two strategic objectives. It is these objectives that frame HR policy development for the Canadian Forces.

This paper will look in detail at one of these policies; the Canadian Forces imposed restriction policy, to evaluate its effectiveness as a personnel management tool. This paper will show that Canadian Forces imposed restriction policy is sound and should be maintained as a retention tool for Canadian Forces members. The paper will do this by first defining key terms related to imposed restriction, and then explaining the general

¹³ *Ibid.*, 3/10.

¹⁴ Department of National Defence, *Military HR Strategy 2020: Facing the People Challenges of the Future* (Ottawa: ADM (HR-Mil), 2002), 3.

purpose behind this particular human resource policy and confirming if the purpose is still being achieved. It will then examine the numbers around this policy, to include data about the users of imposed restriction as well as the financial costs of the policy.

Considering this data, the paper will then examine the cost-effectiveness of the policy both on an individual and a macro level. The paper will then go on to compare Canadian Forces policies to those of the Australian, British and United States military in order to determine its consistency as compared to our allies. The paper will next consider some private sector practices and areas of research as they relate to relocation, travel, spousal support and dependant education policies to determine if it is comparable to these private-industry standards. It will finish by looking at key conclusions drawn from earlier chapters in the paper in order to identify possible policy gaps in the existing Canadian Forces imposed restriction with a view to possibly improving the effectiveness and efficiency of the current imposed restriction policy.

In order to set the stage for what is to follow, this paper will first define some of the key terms that will appear throughout the paper, and will provide background information on Canadian Forces imposed restriction policy. These terms will recur throughout the paper and it is critical to understand them in order to properly evaluate the effectiveness of imposed restriction.

CHAPTER 2 - BACKGROUND

To provide the appropriate context for the discussion that is to follow, it is critical to first define key terms that will be brought up in the course of this paper. These terms will be referred to throughout the paper. These terms include imposed restriction, separation, relocation and perstempo. Some of these terms may have different definitions from different organizations, such as the Canadian Forces, other nations' armed forces, or civilian industry. Those terms that are defined differently by different organizations will be identified as such.

While the paper will look at what imposed restriction entails in more detail later in this chapter, it is important to explain the definition of the phrase at this point. Imposed restriction is a delay of the move of the dependants, household goods and effects at the request of the service member when being posted to a new place of duty. When a Canadian Forces member is posted to a new location and it is determined by the member that moving his dependants and household goods and effects will not be in the best interest of his or her family, the military member may be authorized by his or her career manager to move to the new place of duty on an imposed restriction, that is to say unaccompanied. The imposed restriction will remain valid for a period determined by consultation between the member and their career manager, or until the service member requests that the imposed restriction be lifted by the career manager in order to move dependants, household goods and effects to the new place of duty. The service member's posting message will serve as authority for payment of separation expense, which is an allowance designed to reimburse a service member for the additional living expenses incurred by his or her dependents as a result of the separation. This request is usually

submitted by a service member to his or her career manager prior to the issuing of a formal posting message. The member's career manager is then responsible to examine the request and prepare a recommendation to the approving authority. The career manager is then responsible to advise the member, normally by way of a posting message, of the decision taken by the approving authority.¹⁵

Separation, in the context of this paper, refers to a separation of the service member or employee from their family or dependants for service reasons or at the request of the service member. The separation in this context is temporary in nature and is intended to end either at the request of the member or when service reasons permit. Implicit in this is a geographical separation from the member's principal residence. Separation, as defined for this paper, is a prerequisite for imposed restriction, or for other benefits when considering those benefits available either to members of allied military forces or to employees in private industry. It is not meant to imply, in the context of this paper, any type of legal marital separation that is the result of marital discord and not related specifically to a physical separation of a service member or employee and their spouse or dependants as a result of employment requirements.

In the context of this paper, relocation refers to the movement of a service member or employee from one place of duty or place of work to another as a result of an employers' requirement for the person's services in a new location. It does not include movement related to changes in employers or release from military service, or moves related to retirement. It does however include changes in place of duty or employment at

¹⁵ Department of National Defence, *Imposed Restriction – Document Number QAWI 2352* (Ottawa: Director General Military Careers, Draft 9 July 1999), 3.

the request of the service member or employee, so long as the person's employer remains the same. Relocation can mean either the move of the employee or service member alone or with their dependants, as well as with or without their household goods and effects. Additionally, within the context of this paper, relocation refers to a move that is paid for by the employer and not by the employee or service member.

Perstempo is a term which has been developed by military organizations to describe the overall pace of work that military members face. The Canadian Forces definition is the total of all the demands made by military service on Canadian Forces members. More precisely, it is "the sum of the demands made by military service upon individual members, in terms of deployment load or the tempo of CF operations (optempo), the time members spent away from home for more than twenty-four hours/overnight, and general workload (garrison load)."¹⁶ This definition is similar to that used by the United States military, which defines perstempo as a quality-of-life measurement that measures the amount of time an individual spends away from his or her home station for operational and training purposes, including temporary duty, and designated unaccompanied assignments. It includes all situations where a service member is "...performing duties in a training exercise or operation at a location or under circumstances that make it impossible or infeasible for the member to spend off-duty time in the housing at the member's permanent duty station or home port."¹⁷ Differently from the Canadian forces definition, it does not include general workload.

¹⁶ Jason Dunn, Kim Ford and Steve Flemming, *PERSTEMPO and HDDS – Service Provider Interview and Focus Group Findings*, Report Prepared for Director Strategic Human Resources (Ottawa: Centre for Operational Research and Analysis, 2006), 3.

Now that these key terms have been defined in the context of how they are interpreted for the purposes of this paper, the paper will now briefly review the purpose of Canadian Forces imposed restriction, the regulations that govern it and the benefits that are related to it.

Imposed restriction provides an option for Canadian Forces members who are posted geographically to proceed unaccompanied to the new place of duty. It is intended to be a short term solution to mitigate potential friction between military service and family life, and as a means of mitigating the possible negative effects on military families that can result from frequent relocations. Imposed restriction in its current format came about as a result of interviews conducted by the Standing Committee on National Defence and Veterans' Affairs which took place in the early 1990's. These interviews led to a recommendation by the Committee that the military's system for selecting personnel for postings be made more flexible and responsive to the needs and desires of Canadian Forces families.¹⁸ The key change which came about from this recommendation was that members of all ranks would be able to request an imposed restriction in order to provide Canadian Forces members with greater more control over the disruptions related to relocation by providing them with the ability to influence when to move their families. Further refinement of imposed restriction policy came as a result of two other series of Standing Committee on National Defence and Veterans' Affairs interviews conducted in 1999 and 2000. Specifically, the committee's 2001 Annual

¹⁷ Office of the Executive Secretary of the Secretary of Defence, *2005 Annual Report to the President and the Congress*. (Washington, DC: U.S. Government Printing Office, 2001), B-1.

¹⁸ Department of National Defence, *CANFORGEN 080/99 – Imposed Restriction (IR) Policy* (Ottawa: ADM (HR-Mil), 1999).

Report stated that “the CF expects that its members will relocate their families when posted to a new location. The CF does, however, recognize that there are temporary circumstances that may require the member to elect to be separated from the family”.¹⁹ The report went on to recommend establishment of a Posting Policy Working Group to review imposed restriction policy with a view to providing the member more control over the decision to move the family. As it exists in its current format, based upon a 2005 Canadian Forces General Message, the policy bases imposed restriction requests on a number of possible reasons. These reasons include, but are not limited to, eight specific sets of circumstances that could justify placing a service member on imposed restriction.

Some of the reasons include domestic (referring to the uprooting of a family outside of the Annual Posting season), education (in order to avoid disrupting dependant children during an academic year or during a period of high school), or financial (breaking of a lease, inability to rent or sell a home, or when a working spouse wishes to continue current employment). They also include medical or dental (a dependant is undergoing medical or dental treatment), courses (where a member is posted on a course), or posting notice (when less than ninety days warning is provided for a posting). Finally, the reasons also include the ability for members who are within two years of reaching compulsory retirement age or those who are posted to high cost locations to be posted on imposed restriction. The policy also provides for a member requesting to be placed on an imposed restriction in any other circumstances where in the opinion of the

¹⁹ Department of National Defence and Department of Veterans Affairs, *2001 Annual Report to the Standing Committee on National Defence and Veterans Affairs* (Ottawa: Public Works and Government Services Canada, 2001), A-21/31.

member it would be in the best interests of the family to not move with the member.²⁰

One of the principal reasons to allow some flexibility for Canadian Forces members when it comes to relocation is to mitigate the turmoil on families as family dissatisfaction can have a significant influence on military retention. This link between family satisfaction and retention is looked at in more detail in the following chapter.

As indicated earlier in this paper when defining imposed restriction, the duration of an imposed restriction varies depending on an individual's circumstances, however the duration is usually agreed to between a Canadian Forces member and his or her career manager when a posting instruction is issued. When a member is posted on imposed restriction, they are entitled to receive separation expense, which is a benefit that compensates members for additional expenses as a result of the separation from the member's dependants. Additionally, members who are posted on an imposed restriction are entitled to rations and quarters at Crown expense. This is usually achieved by members living in single quarters on Canadian Forces Bases or, when single quarters are not available, paid for on the economy within a certain rent ceiling (which is dependant on the geographic location of the member's new place of duty).²¹ A final benefit available to Canadian Forces members who are on imposed restriction is Leave Travel Allowance. This allowance allows for reimbursement of travel costs from the member's place of duty to the location of his dependants (within Canada). The amount of the allowance is based upon high rate mileage allowance for the kilometric distance between

²⁰ Department of National Defence, *CANFORGEN 019/05 – Amendment to Imposed Restriction Policy* (Ottawa: ADM (HR-Mil), 2005).

²¹ Department of National Defence, *Compensation and Benefits Instructions* (Ottawa: Director General Compensation and Benefits, 5 November 2007 version).

the member's place of duty and the location of his dependants, less 800 kilometres.²²

This allowance will be explained in more detail in chapter 3.

This chapter has defined a number of key terms that will be used throughout this paper. These terms include imposed restriction, separation, relocation and perstempo. Additionally, this chapter has provided a background as to what the Canadian Forces imposed restriction is, how it is used, and why it exists. The criteria upon which requests for postings on imposed restriction have been introduced, and some of these criteria, particularly spousal employment, can be linked directly back to the demographic concerns raised in the first chapter (specifically to the rise in the number of dual income households). Based on these definitions, the paper will now consider who takes advantage of imposed restriction, why they use it, and how much it costs the Canadian Forces on an annual basis. It will also identify areas that the Canadian Forces have researched as well as areas where further research is required and is planned.

²² The Canadian Forces provides a kilometric rate for the use of a privately owned motor vehicle for the conduct of duty related travel. When it has been determined that it is in the best interests of the service for a member to use their own vehicle, and the costs are determined to be lower than other possible transportation options, then "high rate" mileage is authorized. This rate is typically between \$0.46 and \$0.60 depending on the location. "Low rate" mileage is rarely used, and only in circumstances where high rate mileage would be more expensive than alternate means of transportation, but where a service member still requests to use their own privately owned motor vehicle for their duty travel.

CHAPTER 3 – THE IMPOSED RESTRICTION NUMBERS

In order to understand the effectiveness of imposed restriction policy in the Canadian Forces, it is necessary to first understand the figures that are related to the policy. In this chapter, the paper will review the data around imposed restriction from a number of different perspectives. The chapter will begin by examining the numbers and types of Canadian Forces personnel who take advantage of imposed restriction and then consider the financial costs associated with the policy. Finally, the chapter will look briefly at the social issues associated with how current imposed restriction policy is implemented and areas where Chief of Military Personnel staff are interested in conducting more research.

When considering those Canadian Forces members who use request imposed restriction, it is important to note that the Canadian Forces has no specific method of tracking imposed restriction statistics. Information is gathered from multiple sources including the military's human resource management system and from attitudinal surveys administered to Canadian Forces members and in some cases their families. The surveys that were used to determine the data that follows include: the Fall 2008 Your-Say survey, the 2005 Perstempo survey of Canadian Forces spouses, and data from accommodation providers and personnel living in single quarters in the 2005 and 2006 Accommodations survey.²³

According to data provided by the Canadian Forces' Human Resource Management System, as of December 2008 there were 442 Canadian military personnel

²³ Kerry Sudom, Samantha Urban, and Karen Daley, *Impact of Imposed Restriction on CF Personnel and Their Families*, Briefing Note Prepared for the Chief of Military Personnel (Ottawa: DMPORA, 17 February 2009), 1.

living on imposed restriction. The age range of these personnel was between 23 and 58 years of age, with an average age of 44 years. Of the 442 personnel on imposed restriction 212, or almost 50 percent, were located in the National Capital Region. The next largest groups were located in St-Jean sur Richelieu, Quebec (71 or 16 percent) and Esquimalt, British Columbia (49 or 11 percent). The remaining personnel on imposed restriction were spread amongst 28 other Canadian Forces locations.²⁴ This is significant as it indicates the possibility that many personnel in the Canadian Forces who select imposed restriction see Ottawa as a short-term posting in between postings to what they may consider their home base. It is also important to note that while the majority of imposed restriction users are located in Ottawa, over half are spread across 30 different Canadian Forces bases or support units.

While imposed restriction and related benefits are intended for couples (either married or common-law) to avoid having to pay excessively to maintain two residences during periods of separation, the data shows that while close to 95 percent of members on imposed restriction are either married, married service couples (two service members married to one another), common-law or common-law service couples, close to five percent of personnel on imposed restriction do not fit any of these categories. This number includes single, divorced, separated and widowed personnel.²⁵ The importance of this is that it shows that of those members who are in receipt of imposed restriction benefits, a small number fit into one of two likely categories: they are either in receipt of benefits outside the scope of the intended target audience of the policy (either through

²⁴ *Ibid.*, A-1/3.

²⁵ *Ibid.*, A-1/3.

error or through consciously fraudulent behaviour), or policy exceptions have been made to accommodate a set of specific family circumstances.

Of the personnel on imposed restriction, the largest number belong to Chief of Military Personnel units, with 94 of 442 (or 21.2 percent) belonging to this organization. The next largest sources of personnel on imposed restriction are the Army (with 72 people), the Navy (with 61 people), Associate Deputy Minister – Materiel (50 people) and the Air Force (44 individuals). The remainders are spread among the remaining Canadian Forces level one organizations.²⁶ This breakdown across the Canadian Forces illustrates that the users of imposed restriction policy can be found across the military, and do not seem to be concentrated in any one environment or in any one command.

The majority of personnel on imposed restriction are senior non-commissioned members (Sergeant to Chief Warrant Officer), who make up 57 percent of these personnel, with junior non-commissioned members (Private to Master Corporal) making up sixteen percent of those personnel on imposed restriction. Senior officers, from Major up to General, make up fifteen percent of personnel on imposed restriction, while junior officers (ranks from Officer Cadet to Captain) make up twelve percent of imposed restriction users.²⁷ It can be drawn from this set of data that the users of the policy tend to be the more senior personnel in the Canadian Forces, since both senior non-commissioned members and senior officers are over-represented among imposed restriction users as compared to their proportion of the overall military membership.

²⁶ *Ibid.*, A-2/3.

²⁷ *Ibid.*, A-2/3.

The data drawn from the Fall 2008 Your-Say survey provides a picture of some of the additional information surrounding those personnel who elect to relocate on an imposed restriction. Of particular note are the reasons for opting for a posting on imposed restriction. It must be noted that according to the survey methodology, personnel completing the survey indicated all reasons for electing to be posted on imposed restriction and did not limit their responses to selecting only a single or most important reason for their decision. As a result, many offered multiple responses, leading to numbers that exceed 100%. Of the 73 respondents who completed the survey who were on imposed restriction, 80 percent indicated that the reason was based upon their spouse or partner's employment. 76 percent indicated that their children's education was a reason for electing to be posted on imposed restriction, while 69 percent indicated that stability in family life was a reason for imposed restriction. Other reasons that were indicated for opting for a posting on imposed restriction included a spouse or partner that was not interested in moving, family responsibilities, a spouse or partner's educating, marriage or relationship difficulties and children with special needs. The results of the survey also showed that only two respondents indicated that housing cost was a reason for opting for imposed restriction.²⁸ It is interesting to note from these numbers that it appears that the majority of respondents who opted to be posted on an imposed restriction did so for multiple reasons, and not simply because they met a single criteria.

²⁸ *Ibid.*, B-1/3.

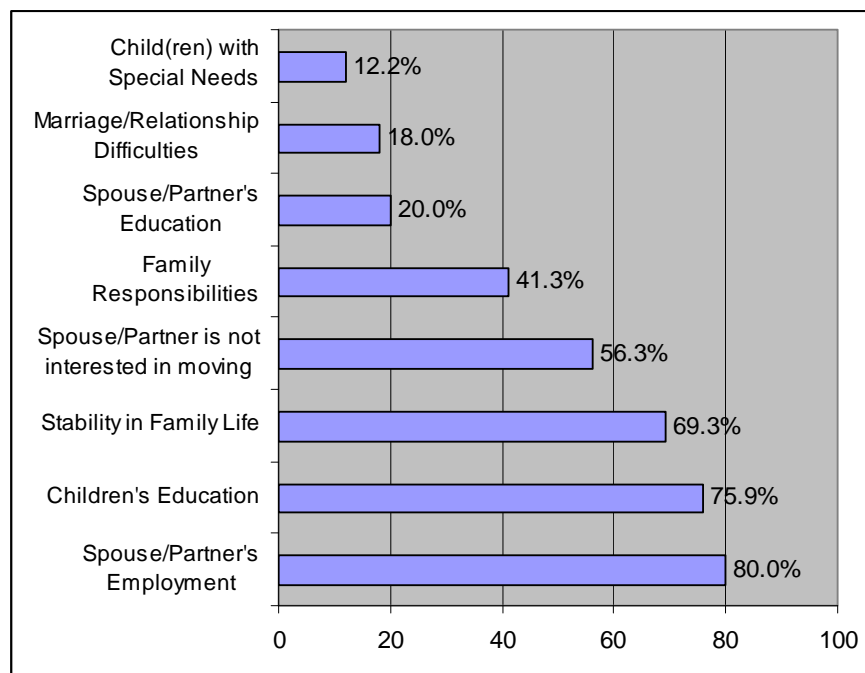


Figure 3 – Reasons for Being on Imposed Restriction

In the Your Say survey, the length of time which respondents were on imposed restriction varied between two months and nine years, with an average duration of slightly over 18 months. It can be drawn from this data that most users of imposed restriction, though not all, do so for a relatively short period of time. In fact, of the 73 respondents only twelve had been on imposed restrictions of greater than thirty months. This is important as it indicates that the majority of Canadian Forces members who opt to be posted on an imposed restriction do so for a relatively short term, which falls within the intent of the policy. It is also important to note that there are a number of imposed restriction users who regard imposed restriction as a lifestyle choice rather than as a temporary measure to relieve undue hardship on a member's family as a result of a move.

The survey of Canadian Forces spouses that was conducted in 2005 examined the impacts of military life on families. The imposed restriction data received from survey recipients was consistent with other surveys with 129 respondents of 1661 (7.8%)

reporting that their partner was on imposed restriction. This survey noted no particular differences in psychological well-being, depression or life satisfaction related to whether or not the individuals were on imposed restriction. It did however identify that military spouses whose partners were on imposed restriction were significantly more likely to report that the demands of military life interfered with their family life.²⁹ It is not clear from the survey results if this response is a result of the imposed restriction or whether the response generated the reason for the imposed restriction. Policy-makers would certainly hope it was the latter, since reducing the impact of military service on family life is one of the goals of imposed restriction policy.

It is important at this time to reiterate some of the demographic data provided in chapter one. The workplace has changed and now reflects more dual-career and dual-income families. The frequent relocations and separations associated with deployments and other military taskings have negatively affected the ability of military spouses to develop and maintain careers of their own.³⁰

There have been a number of work-family conflict items identified in the survey entitled “Impacts of Military Life on Families: Results from the Perstempo Survey on Canadian Forces Spouses” conducted in 2009 identified the following responses to questions regarding Family-Work conflict. 39% of respondents (spouses of military members) either agreed or strongly agreed with the statement “my career progression has suffered as a result of my family obligations”, while 32% of respondents agreed or

²⁹ *Ibid.*, 2.

³⁰ Sanela Dursun, *Impacts of Military Life on Families: Results from the Perstempo Survey of Canadian Forces Spouses*, Report Prepared for the Chief of Military Personnel (Ottawa: Director General Military Personnel Research and Analysis, 2009), 6.

strongly agreed with the statement that “the demands of my family or spouse/partner interfere with my work-related activities”.³¹ This is important because all of these issues of work-family conflict can impact on a service member’s overall satisfaction with the Canadian Forces, and in the longer term can impact on retention.

A final study which examined demographic aspects of imposed restriction was a 2005-2006 accommodations study, which collected data from both service members and accommodation providers. The accommodation providers surveyed included a number of personnel whose responsibilities and areas of expertise included accommodations as one of the aspects. These personnel included base, wing or support unit commanders and Chief Warrant Officers, administration officers, accommodation officers and engineering officers.

While this study did not directly examine why personnel opted to be posted on imposed restriction, it did look at the suitability of military accommodations for members on imposed restriction as well as the reasons that contributed to the decision to reside in crown-owned single quarters rather than living off-base. Of the 27 accommodation providers surveyed, only 21 percent believed that crown-owned single quarters were acceptable to house Canadian Forces personnel who were on an imposed restriction. The accommodation providers also indicated that sixteen percent have had to order personnel on imposed restriction out of single quarters due to higher priority accommodation requirements, most commonly reported at training and Army bases. Of the Canadian Forces members living in single quarters who were surveyed, 253 of 4224 reported being on imposed restriction. The other groups included normal “living-in” personnel, transient

³¹ *Ibid.*, 55.

members, personnel on training, and incremental staff. Both personnel on imposed restriction and those who were “living-in” rated cost and proximity to work as the most important reasons for living in crown-owned single accommodations. However, compared to those personnel who were “living-in”, those on imposed restriction rated lack of transportation as a significantly more important reason for living on base.³² When asked to rate the importance of accommodation conditions, convenience and security and privacy, members on imposed restriction rated these factors as more important than any of the other member groups surveyed.³³

All of the dissatisfiers listed above with regards to the quarters available to Canadian Forces members can have detrimental effects on their perceptions of military service. They could lead to members not opting to request imposed restriction, eventually having potentially adverse effects on the member’s attitudes towards military service and possibly negatively affecting their desire to remain in the Canadian Forces.

Overall, it is possible to conclude from these surveys that the users of imposed restriction policy can be found across the military, and do not seem to be concentrated in any one environment or in any one command. Many seem to see Ottawa as a short-term posting in between postings to what they may consider their home base. Users of the policy tend to be the more senior personnel in the Canadian Forces, since both senior non-commissioned members and senior officers are over-represented among imposed restriction users as compared to their proportion of the overall military membership.

³² Kerry Sudom, Samantha Urban, and Karen Daley, *Impact of Imposed Restriction on CF Personnel and Their Families*, Briefing Note Prepared for the Chief of Military Personnel (Ottawa: DMPORA, 17 February 2009), 3/4.

³³ *Ibid.*, E-1/1.

Spouses of military members are already concerned about the impact that military service has on their own employment and on their families, and imposed restriction provides service members and their families with some level of control over the amount of work-family conflict that service in the Canadian Forces creates. Finally, the condition of quarters can potentially have a negative effect on members' willingness to request imposed restriction, possibly leading to a negative influence on a members' retention in the longer term. This effect seems to be mitigated however by the positive aspects of quarters that many imposed restriction users have identified: proximity to place of work, convenience, and security and privacy.

Having looked at the types and numbers of Canadian Forces members who benefit from imposed restriction and having drawn some broad conclusions from their breakdown and their survey responses, this paper will now look at the financial costs associated with the application of this policy. The financial costs to the Canadian Forces associated with imposed restriction policy include costs related to relocation, the individual costs for separation expense, Leave Travel Allowance, and costs for rations and quarters. These costs will be considered on an individual basis (what it costs each year to keep a service member on imposed restriction), as well as costs on a macro scale (what the total costs to the Canadian Forces are on an annual basis).

Separation expense, as explained in the previous chapter, is an allowance intended to compensate a Canadian Forces member as a result of a separation from dependants when posted to a new place of duty and dependants have not been moved at public expense. The amount of compensation is based upon the daily rate for incidental expenses as defined by Treasury Board. The current rate for incidentals is \$17.30

(CAD)³⁴. This allowance is paid on a monthly basis based upon the number of days in a particular month, abated by two days each month to account for annual leave taken.

Abatement of this allowance is also done for days when a Canadian Forces member is on temporary duty, is on sick leave, or is admitted to hospital.

Leave Travel Allowance is an allowance paid out annually to service members for whom separation expense applies. The purpose of this benefit is to compensate Canadian Forces members for the cost of leave travel from their place of duty to the location of their dependants, when the move of their dependants has not been authorized. As discussed in chapter two, the amount of compensation is based upon the direct road distance between the place of duty and the location of the member's dependants, less 800 kilometres. The rate payable depends upon the location of the members' place of duty, but currently ranges between \$0.46 (Saskatchewan) and \$0.595 (Yukon). This benefit is claimable once per leave year (1 April to 31 March).

Canadian Forces members on imposed restriction are entitled to receive rations and quarters at crown expense for the duration of their separation. The preferred means of achieving this is for service members to occupy crown accommodations, such as single quarters available at most Canadian Forces Bases or support units. The costs associated with using available government rations and quarters are based on the monthly charges for rations and quarters and are currently \$420.00 monthly for quarters (as per the latest Director of Compensation and Benefits Administration direction from February 2010) and \$625.55 for rations (based upon Director Food Services direction from November

³⁴ Treasury Board Secretariat, *National Joint Council Travel Directive* (Ottawa: Treasury Board Secretariat, 2009), Appendix C.

2009). For members who are in locations where rations and accommodations are not available, the rate of reimbursement is based upon the actual cost of lodging, not to exceed 50% of the daily unaccompanied lodging rate for commercial lodging.

Entitlements for meals and incidental expenses are equal to 35% of the daily composite allowance (which includes amounts for three meals and for incidentals). The daily composite allowance in Canada and the United States is currently \$84.50, 35% of which is \$29.58. As with separation expense, this amount is abated by two days per month to account for annual leave as well as for any periods of temporary duty, sick leave or hospital admission.

Adding these numbers up, it is possible to see that at the low end of the spectrum, the monthly cost to maintain a Canadian Forces member on imposed restriction is currently just under \$1600 (separation expense plus costs of rations and quarters). Annualized, the cost would be in the vicinity of \$19000, not including the leave travel allowance benefit. This amount is comparable to the cost of an accompanied move, which according to 2006 data, costs approximately \$18000.³⁵ However, when taking into account the additional costs of imposed restriction when rations and quarters are not available, the monthly expenditure for a single individual on imposed restriction can go up quickly. Even relatively modest accommodations, rented on the economy, can cost upwards of \$1200 in many Canadian locations. Add to that the composite daily allowance (at 35%) of approximately \$900 monthly and the cost to maintain a Canadian

³⁵ According to the November 2006 Auditor General Report, the Integrated Relocation Program, contracted to administer relocations for both the Canadian Forces and the RCMP, conducted 15000 moves at a cost of \$272M in 2006. This translates to an average of \$18000 per move. Of the 15000 moves, 83% were moves of Canadian Forces personnel.

Forces member on imposed restriction would be at least \$2100 monthly, and potentially even higher depending on the cost of commercial accommodations at the new place of duty. This translates to a cost of over \$25000 on an annual basis.

Institutional costs of imposed restriction have not been well monitored over the years; however information from Director of Military Careers indicates that in the 2008 fiscal year, imposed restriction cost the Canadian Forces close to \$66-million dollars. There is also a sense at the Director of Military Careers level that in many instances imposed restriction has become a lifestyle choice rather than the temporary fix that it was intended to be.³⁶ When compared to the cost of cost moves, outlined in the paragraph above, it is clear that from a cost-effectiveness stand point, imposed restriction costs are comparable to an accompanied cost move when Canadian Forces members on imposed restriction are able to take advantage of available crown accommodations and rations. In fact, for imposed restrictions of lengths of two years or less, the cost is almost identical to the expense of the two accompanied cost moves that it would take to get a service member and their dependants to a new place of duty and then to move them again after two years. As the duration of a posting increases beyond the two year mark, however, the expenses related to imposed restriction exceed the expense of the two cost moves, making imposed restriction a less economical option for postings of greater than two years. When considering the expense related to providing a service member on imposed restriction with rations and quarters “on the economy”, it is clear that after about 18 months of imposed restriction, the two cost moves become the more cost-effective

³⁶ Steven Kiropoulos, *Briefing Note on IR*. (National Defence Headquarters: email, Tue 2/16/2010 12:51 PM).

option. A conclusion that can be drawn from this is that imposed restriction can be not only a benefit to a family from the point of view of minimizing spouse and dependant disruption, but can also be an economical option for the institution, so long as costs related to duration of imposed restriction and type of quarters and rations can be controlled by placing limits on the duration of imposed restrictions.

Having looked at the type and number of Canadian Forces personnel who are users of imposed restriction and the financial costs to the Canadian Forces to maintaining imposed restriction as an option available to service members on posting, this paper will now briefly consider the social issues associated with imposed restriction. These social issues have yet to be studied in detail; however Chief of Military Personnel staffs have indicated that it is an area in which they wish to conduct more research. Because of the shortage of research in this area, this section will not provide any specific data related to the social issues, but will rather consider the concerns that Chief of Military Personnel staffs have articulated.

One of the research shortfalls that human resources staffs in Ottawa have noted is in the area of analysis of the effectiveness of the policy while considering the effects that the separations that imposed restriction creates have on families. Of key concern is the effect that lengthy and repeated postings on imposed restriction have on the family unit. An area of particular interest is determining whether the separations caused by use of the policy strengthen family units by providing them with greater stability, or whether these separations caused by imposed restriction instead lead to greater levels of family and marital breakdown.

A second area of research that Chief of Military Personnel staffs are interested in pursuing is in what proportion of imposed restriction users have begun to regard imposed restriction as a lifestyle choice (discussed briefly earlier in this chapter). There is concern in Ottawa that a significant proportion of Canadian Forces personnel who have opted to be posted on imposed restriction are not in fact using the policy as a temporary measure, but instead have no intention of reuniting with their dependants except in the very long term. Again, while there is some data available which describes the length of time imposed restriction users are taking advantage of the policy, there has been no research to look specifically at these chronic users to better understand their long term goals and intentions.

A final area of interest for human resources staffs in Ottawa, primarily those who face budgetary pressures, is the number of personnel who defraud the system by opting to be posted on imposed restriction with no intention of ever reuniting with their families, but failing to indicate a change in family status. Information from Director of Military Careers staff indicate that as a result of situations such as that described above, whether by design or unintentionally, there is a requirement to recover benefits paid to Canadian Forces members either fraudulently or in because the benefits were granted in error. According to Director of Military Careers staff, these recoveries are conducted regularly, and can range from \$20-100K³⁷.

This chapter has examined the numbers around imposed restriction in the Canadian Forces. It has provided details about those members who opt to be posted on

³⁷ Steven Kiropoulos, *Briefing Note on IR*. (National Defence Headquarters: email, Tue 2/16/2010 12:51 PM).

imposed restriction. It has looked at the financial and economic costs to the Canadian Forces for maintaining imposed restriction. Finally, it briefly looked at the social issues associated with imposed restrictions and provided some information regarding future areas of research that the Canadian Forces is interested in pursuing in order to better understand the impact that imposed restriction has on families and the benefit that it also provides. Some conclusions that can be drawn from this chapter include the fact that from a demographic standpoint, imposed restriction is used by a fairly small number of personnel, although at a significant cost to the institution. It is also important to note that members on imposed restriction who are living in crown accommodation on military establishments appreciate the convenience, proximity to work, and privacy and security offered by military quarters. This is balanced out by concerns regarding the quality of accommodations, which can have a negative effect on a member's willingness to occupy military quarters. This chapter also identified costs associated with imposed restriction, and compared these costs to those associated with moving Canadian Forces personnel with their families. Finally, this chapter discussed briefly some research areas of interest for Chief of Military Personnel staff in order to better understand the social costs and effects of separations caused by the application of imposed restriction policy. The next chapter of this paper will look at policies used by some of Canada's allies to deal with situations similar to those created by imposed restriction.

CHAPTER 4 - ALLIED EXAMPLES

While imposed restriction is a uniquely Canadian creation in many respects, some Canada's allies maintain similar policies, or have developed slightly different policies in order to be able to deal with similar family situations. This chapter will look at some of the policies, practices and benefits offered by Australia, the United Kingdom and the United States. It will compare these policies to Canada's own imposed restriction policy, and will also compare the benefits offered by these other nations with those offered by Canada in order to determine whether Canadian policy is consistent with those of its allies both in its purpose and in the compensation provided. This chapter will also identify some of the research being conducted in other nations, particularly the United Kingdom and the United States, in order to identify the value of these kinds of policies as well as the best way to develop new policies and to compare these nations' research with that of Canada.

The Australian Defence Force, while not having a policy identical to Canadian Forces imposed restriction, does provide some financial compensation to its members when in situations similar to those that imposed restriction is designed to deal with. Specifically, the Australian Defence Force has a financial benefit entitled separation allowance which is designed to compensate a member when they spend time away from their families or dependants as a result of service reasons.³⁸ More precisely, it is intended to recognize that separation from one's home and family often incurs additional costs or

³⁸ Zhigang Wang and Leesa Tanner, *Military Compensation and Benefits – A Preliminary Exploration of Policies in TCCP Countries*, Report Prepared for Director General Military Personnel Research and Analysis (Ottawa: Centre for Operational Research and Analysis, 2008), 65.

expenses that are directly attributable to that separation. The particular circumstance under which the Australian Defence Force's benefit is payable that matches most closely what imposed restriction supports is that of "a member with dependants (unaccompanied) posted to a location away from where his/her dependants live".³⁹ In this circumstance, an Australian Defence Force member is entitled to a daily rate of \$7.64 (AUD) beginning on the fifteenth day of separation. This is considerably lower than the \$17.30 amount that the Canadian Forces pays to its members who are on imposed restriction, although there is no indication of any abatement that is done to account for days of annual leave or other circumstances as was identified in chapter 3 under the Canadian Forces imposed restriction policy.

The Armed Forces of the United Kingdom have a number of benefits available to them depending on their separation status. For this purpose, the United Kingdom recognizes two different separation statuses. The first is involuntary separation which is generally position-specific, meaning that a service member would be posted to a position where his dependants would be prohibited from accompanying them. Involuntary separation also applies under some additional circumstances where a member requests to be placed on this status, such as when dependant children are in their last two years of school, when they are posted to a course of up to twelve months duration, or when they are awaiting single family accommodations. The second status is a voluntary separation, where a service member has made a conscious decision to serve unaccompanied.⁴⁰ This

³⁹ Department of Defence, *Australian Defence Force Pay and Conditions Manual* (Canberra: Department of Defence, 2009), Chapter 6 Part 1 Division 1.

does not include separations that occur at the members' request that fall under the circumstances listed above.

When a member is on involuntary separation status, they are entitled to a number of different benefits. The first of these is longer separation allowance paid at a daily rate of 6.38 GBP in 2008. As with the separation allowance paid to members of the Australian Armed Forces, this amount is significantly lower than the amount paid to members of the Canadian Forces who are on imposed restriction. The aim of longer separation allowance is to support personnel and improve retention by compensating those members who experience separation over and above that for which they are already compensated by their basic pay formula. This allowance is paid to a member when he is posted to a different theatre than his family residence is located in. For policy purposes, the theatres recognized by the armed forces of the United Kingdom are Great Britain, Northern Ireland, Northwest Europe, and other countries (within the boundaries of that country). If the service member is posted on an involuntary or voluntary separation within a theatre, then the member is entitled to the Get You Home Travel benefit, which is discussed in more detail below. It is generally paid in increasing amounts with a view to targeting those service members who experience the greatest number and duration of separation throughout their service. The allowance recognizes the effects of separations where return to the duty station on weekends or holidays cannot occur because of either the nature or location of the duty. Rates of longer separation allowance are based upon the daily rate indicated above which increases by approximately 15 percent after the first 400 days in receipt of longer separation allowance and again after every additional 300

⁴⁰ Ministry of Defence, *JSP 752 – Tri Service Regulations for Allowances Version 9* (London, UK: Ministry of Defence, 17 December 2008), 1-2-B-1.

days during which they receive the allowance.⁴¹ These increases are cumulative over the course of a United Kingdom service member's career.

A second benefit to which United Kingdom service members may be entitled to if separated from their families on involuntary separation status is continuity of education allowance. The aim of continuity of education allowance is to assist military personnel in achieving continuity in the education of their dependant children that would otherwise be impossible to achieve if their children accompanied them on frequent assignments both within the United Kingdom and abroad. This benefit is intended to be used only until a dependant child reaches a pre-determined stage in their education, at which time the benefit ceases or else must be re-applied for.

For United Kingdom service members who are on voluntary separation, the only entitlement is for longer separation allowance at the lowest rate for the duration of their separation (6.38 GBP in 2008). There is no increase in this rate when on a voluntary separation and their days in receipt of longer separation allowance do not accumulate towards higher allowance rates.

A benefit program which is unique to the armed services of the United Kingdom is the Army Over 37 provision. The aim of the Army Over 37 provision is to enable the domestic stability of military families of those service personnel who choose to serve unaccompanied in the later part of their careers. It does so by assisting with the costs of settling their immediate family at a selected place of residence in the United Kingdom and enabling them to serve voluntarily separated at their new place of duty without

⁴¹ *Ibid.*, 5-1-4, para 05.0109.

financial hardship.⁴² Service members who take advantage of the Army Over 37 provision receive normal move benefits if they are moving their dependants to a selected place of residence and can receive longer separation allowance if entitled based upon the geographic separation from their dependants. Additionally, they are entitled to a waiver of single living accommodations charges for the duration of the voluntary separation. Despite its name, the Army Over 37 provision benefits are equally applicable to members of other branches of the United Kingdom armed forces.

The final benefit offered to United Kingdom service members who are separated from their dependants is the Get You Home Travel benefit. The aim of Get You Home Travel is to support service personnel and improve retention by reducing the impact of separation on service personnel and their immediate family. This is achieved by assisting United Kingdom service personnel who have the opportunity to return to their qualifying residence with the costs of their travel where the duty unit and the qualifying residence are within the same theatre.⁴³ It is paid as a daily rate which is dependant upon the distance to be travelled, and applies only in circumstances where it is feasible for a service member to reach his qualifying residence for a weekend or holiday (in other circumstances, longer separation allowance would apply). A service member cannot receive both the Get You Home travel benefit and longer separation allowance at the same post. This is comparable to the Canadian Forces' leave travel allowance; however the Get You Home Travel benefit is not limited in terms of frequency of use, where the Canadian Forces' comparable benefit is only payable once per leave year. This is

⁴² *Ibid.*, 7-8-1, para 07.0801.

⁴³ *Ibid.*, 5-2-1, para 05.0201.

balanced by the fact that this particular benefit (Get You Home Travel) is only payable to those United Kingdom service members who are not in receipt of long separation allowance.

The United States military has much more restrictive policies where voluntary separation from dependants is concerned. They also recognize that some separations are involuntary and provide associated benefits; however when the separation is at the request of the service member, special circumstances must exist for any separation benefits to be approved.

The most common benefit available to American service men and women is the family separation allowance. Family separation allowance provides United States service members with direct compensation for additional expenses incurred as a result of a family separation situation resulting from military necessity. It is normally only available to service members when the move of dependants to the new post is not authorized (what would generally be considered an involuntary separation). The only circumstance under which family separation allowance would normally be authorized as a result of a voluntary separation would be when the move of dependents is authorized at government expense, but the member opts for an unaccompanied tour of duty because a dependent is unable accompany the service member to that new place of duty because of a certified medical reasons.⁴⁴ Family separation allowance is payable to American service members at a fixed rate of \$250 (USD) regardless of location or duration of the separation.

⁴⁴ Department of Defense, *Financial Management Regulation Volume 7A* (Washington, DC: U.S, Government Printing Office, June 2009), 27-4.

While the three armed forces being looked at, Australia, the United Kingdom and the United States, all have similar policies, practices and benefits to those offered by the Canadian Forces, the circumstances in which members are entitled to receive them as well as the amount of compensation provided vary greatly. Both the United Kingdom and Australia accept circumstances similar to Canada to justify the provision of benefits, while the United States military is far more restrictive in the application of its separation policy. From a benefits standpoint, Canada appears to provide better compensation to its service members than all three of its allies, offering a larger monthly allowance for incremental expenses associated with separation than do any of the three other countries. Canada also offers similar accommodation and rations allowance to all three, although Canadian Forces policy appears to be more generous in terms of not only providing free crown accommodations and rations, but by also offering to cover costs associated with commercial lodgings when military quarters are not available. Of the other three countries examined, only the United Kingdom is equally generous. In terms of travel allowances, the leave travel benefit offered by the Canadian Forces is less generous than that offered by the United Kingdom, but this benefit is not provided by either the United States or Australia. Overall, the application of Canadian imposed restriction policy is consistent with the policies of the other western militaries being considered.

In addition to already established human resources policies to deal with separation of military members from their families or dependants, both the United Kingdom and the United States are conducting research to determine the effectiveness of existing policies as well as to assist in the development of new policies to deal with changing expectations on the part of service members.

A particularly relevant report by the RAND Corporation that looked at remuneration in the armed forces of the United Kingdom drew some interesting conclusions related to their policies on separation as well as on attitudes towards the military. The study was done through the use of focus groups at six sites. The study participants included 162 service members (from the Army, Royal Navy and Royal Airforce). Additionally, 35 military spouses or partners participated in the study. The study participants were broken down into 21 focus groups and represented Junior Ranks, Senior Ranks and Officers. One observation in particular identified unwanted behaviours created by certain compensation and benefit practices. Specifically, some United Kingdom service members were encouraged to distort their mobility in order to continue drawing continuity of education allowance and continue sending their children to boarding school.⁴⁵ This same report identified disruption and family instability as being the highest rated negative aspect of service in the armed forces by spouses. The desire for reduced disruption was the highest rated factor providing influence in deciding to stay on in the armed force of the United Kingdom among military spouses.⁴⁶ The overwhelming perception among survey respondents was that the British Ministry of Defence needed to do more to counter the effects that disruptions had on military families. The particular concerns identified were spouses' ability to work, spouse and family access to medical care, and on education of dependant children.⁴⁷ Finally, the

⁴⁵ Hans Pung, Laurence Smallman, Tom Ling, Michael Hallsworth and Samir Puri, *Remuneration and its Motivation of Service Personnel - Focus Group Investigation and Analysis*, Report Prepared for the UK Ministry of Defence (Santa Monica, CA: RAND Corporation, 2007), 7.

⁴⁶ *Ibid.*, ix.

report made a recommendation for further study to be done of disruption and family stability issues.⁴⁸

The United States military conducts research regularly on various aspects of its armed forces, including on military families. One report particularly applicable to the subject of this paper is entitled “What We Know About Army Families: 2007 update”. This is an update from a 1993 report that looked at military families with a view to influencing policies and programs. The report is a compilation of data from various other reports and surveys, as well as general military demographic data. Of primary relevance to this paper are issues raised regarding relocation and family well-being. When considering relocation, the report acknowledges that Army families tend to relocate more frequently than their civilian counterparts. The report also identifies that research over the past few decades has emphasized the unintended negative consequences that repeated relocations can have on family life. Of particular note were the following problem areas: changes in the cost of living, loss or reduction of spouse income and changing dependants’ schools.⁴⁹ Significantly, the report identifies that United States military spouses are less likely to be in the labour force, less likely to work full-time, more likely to be unemployed and tend to earn significantly less than their civilian counterparts. Specific mention is made of the fact that the lower earnings of military spouses are

⁴⁷ *Ibid.*, 42.

⁴⁸ *Ibid.*, 50.

⁴⁹ Bradford Booth, Mady Wechsler Segal, and D. Bruce Ball, *What We Know About Army Families: 2007 Update*, Report Prepared for the Family and Morale, Welfare and Recreation Command (Alexandria, VA: Family and Morale, Welfare and Recreation Command, 2007), 26.

related primarily to frequent relocations.⁵⁰ The report goes on to recommend that the Army “Continue to develop strategies to enhance the earnings and employment opportunities of Army spouses.”⁵¹

These surveys highlight the common dilemmas faced by military families surrounding relocation, spousal employment and dependant education. All of these factors tend to be dissatisfiers to military spouses, and by extension to military members. These factors also tend to form the basis for members requesting separation from their families, or in the case of the Canadian Forces, requests for imposed restriction. We can also see that these dissatisfiers can possibly lead to retention difficulties if service members and their families become overly frustrated with the demands of relocation and military service.

This chapter has looked at policies and benefits provided by allied militaries to their personnel when they are placed in circumstances similar to those which Canadian Forces imposed restriction policy was designed to deal with. It has also looked at some of the research in this area being conducted by the United States and the United Kingdom. Based upon the policies of Canada’s allies, it is clear that many have policies similar to imposed restriction in place to deal with challenging family circumstances where it may not be possible or desirable to move one’s family for any one of a number of reasons. It can be seen that the Canadian Forces’ imposed restriction policy is consistent with the policies in place in other similar armed forces, and that the benefits offered by the Canadian Forces are in most cases comparable to those offered by other

⁵⁰ *Ibid.*, 81-82.

⁵¹ *Ibid.*, 86.

nations. The one exception would be the United States armed forces, which have a very limited policy on separation that is far more rigid and less flexible than the policies of Australia, the United Kingdom or Canada. The areas of research being looked by the Canadian Forces are also similar to those being examined by its allies. Common areas of research include attitudes of members and spouses towards the military, issues of spousal employment and family disruption and finally misuse and abuse of the benefits available to service members who are separated from their dependants. Having now considered the similarities and differences between the Canadian Forces and some of its allies in terms of how they deal with separation and what aspects of separation they are conducting research into, the paper will now look at how private industry deals with separation and the concerns faced by those working outside the military environment.

CHAPTER 5 – INDUSTRY RELOCATION PRACTICES

While military organizations tend to offer specific policies to deal with separation of families due to unaccompanied postings, private industry does not specifically address this issue by providing benefit packages to those who elect to be relocated to a new place of work without their families. That is not to say that private industry is not aware of the concerns families have, however relocation of individuals in private industry tends to be on a volunteer basis rather than the mandatory (or almost mandatory) manner in which it is dealt by militaries. This chapter will look at some of the ways that private industry deals with these types of situations, as well as looking at the areas of concern that the private sector has identified and is researching further.

Where military service members are expected to accept postings and geographical moves in order to meet service requirement, private industry does not relocate their personnel in the same manner. Relocations and assignments in the private sector are almost always on a volunteer basis, meaning that the concept of relocating without your partner or family is almost unheard of. The primary means used by the private sector to deal with employee relocations in which the family unit does not move with the employee is the use of what is referred to as extended business travel.⁵² Under this kind of program, employees travel to their new place of work as if they were working there temporarily. They reside in transient accommodations such as hotels or short-term stay apartments and receive either reimbursement or per diem amounts to cover food and incidental expenses. They also tend to have home travel expenses reimbursed to varying degrees. This level of compensation is similar to that provided to Canadian Forces

⁵² KPMG, *Global Assignment Policies and Practices – Survey 2008*, Report Prepared for KPMG International Executive Services (United States of America: KPMG, 2008), 7.

members who proceed on imposed restriction but must stay in commercial accommodations. Due to the significant costs involved, this type of extended business travel tends to only be used for short-term assignments or in anticipation of the employee eventually relocating his family.

Despite the existence of practices such as extended business travel, many private sector businesses have noted difficulties in finding suitable volunteers for positions that would require a relocation of the member and their family and are taking steps to address this problem. Much like the military, the private sector has begun to acknowledge the demographic shifts outlined in the first chapter of this paper. Of particular interest in the private sector is the rise of dual income families, and the need to accommodate or at least acknowledge the impact that relocation can have on an employee's spouse.

Surveys conducted in of the relocation industry indicate that "family and spouse career issues were the most cited reason for rejecting assignments relocation"⁵³ in the private sector. With an ever increasing number of dual income families in Canada, this can be extrapolated to suggest that the private sector is facing a reduction in the numbers and quality of volunteers for relocation to a new assignment.⁵⁴ Reasons identified by employees for turning down assignments are similar to the reasons offered for Canadian Forces members to request imposed restriction, with include spouse or family members' career issues being the most frequent reason given for rejecting relocation to new

⁵³ Lorraine Bello and Galen Tinder, "Dual Career Implications on Workforce Mobility: The Evolution of the Relocating Spouse/Partner," *Benefits and Compensation Digest* (September 2009): 36.

⁵⁴ *Ibid.*, 38.

assignments.⁵⁵ Other research in the area of international human resource management has identified that it is an employee's partner or spouse that has the greatest influence in affecting, either positively or negatively, an employee's successful adjustment to a new assignment.⁵⁶

In assessing means to improve their ability to relocate employees, many companies in the private sector have developed ways to support employee's family members when they take on new assignments which require relocation. A KPMG survey on global assignment policies and practices asked companies what types of assistance they provided to the accompanying partners of employees being relocated globally if the partners' careers were interrupted by the relocation. Two thirds of the companies surveyed provided some kind of spousal assistance; with the most frequent being work visa assistance (only relevant to international moves), an allowance or payment for specific expenses such as job search, reimbursement of education expenses, and actual job search assistance at the new location. In very rare cases some organizations actually offered partial or full financial compensation for lost salary.⁵⁷ The Canadian Forces do currently offer some spousal career support to members when posted, but this is fairly limited and covers only expenses related to the preparation of curriculum vitae and some limited job search assistance. While it would be possible for the Canadian Forces to

⁵⁵ *Ibid.*, 38.

⁵⁶ Robert Konopaske, Chet Robie, and John M. Ivancevich, "A Preliminary Model of Spouse Influence on Managerial Global Assignment Willingness," *International Journal of Human Resource Management* 16:3 (March 2005): 407.

⁵⁷ KPMG, *Global Assignment Policies and Practices – Survey 2008*, Report Prepared for KPMG International Executive Services (United States of America: KPMG, 2008), 18.

improve upon these benefits as a means of reducing interest in imposed restriction, the military faces hurdles which the private sector does not have to deal with. The biggest obstacle to simply improving spousal employment benefits for service members is the relatively remote locations of many Canadian Forces Bases and units, as well as the limited career opportunities available to working spouses in many of these locations.

This chapter has examined some relocation and separation policies and practices in the private sector as compared to those available to members of the Canadian Forces. While the practices of the private sector do not coincide with those of the military, there are structural reasons for this, particularly the fact that for service members, relocation is generally not a choice and is regarded as a necessity to meet service requirements. This can be contrasted with the private sector where most employee relocations occur on a volunteer basis. The private sector has acknowledged however that the demographic changes in Canadian society and in particular the increased participation of spouses in the workplace has meant that it is becoming more and more challenging to find the volunteers willing to relocate. The private sector has taken steps to address this, most of which revolve around compensation for spouses and spousal employment assistance at the employee's new place of work. Having now considered briefly the policies, practices and benefits offered in the private sector relating to relocation and separation, and having contrasted those with the policies of the Canadian Forces, this paper will go on to look at policy gaps that could be addressed in order to improve the effectiveness and efficiency of imposed restriction policy.

CHAPTER 6 – POLICY GAPS

Up to this point, this paper has looked at the policies and research areas of the Canadian Force and allied militaries as they relate to separation and relocation, and has examined some private industry practices and research. It has shown that Canadian Forces imposed restriction policy and the benefits associated with it are consistent with these allies although not with the private sector. It has also shown that the policy is effective in addressing some of the concerns of service members and their families with respect to the disruptions caused by frequent relocation, and the effects that relocation can have on spousal employment, dependant education and family medical care. This paper has also linked the satisfaction of military spouses and families to the retention of service members. This paper will now examine some possible actions to address gaps in Canadian Forces imposed restriction policy. It is important in the context of this paper to identify those gaps or weaknesses in imposed restriction policy that could be addressed, as imposed restriction has been identified by National Defence Headquarters as a policy target. It is seen as an expensive policy that serves a limited number of personnel and that does little to advance the interests of the Canadian Forces. This chapter will look at how the Canadian Forces could address some of these gaps in order to modernize its imposed restriction policies with a view to reducing or at least reining in costs while still providing the option of imposed restriction for those who depend on the flexibility it provides, and by extension making imposed restriction more palatable to policy makers in Ottawa. The three policy areas which this chapter will consider include duration of imposed restriction postings, screening of personnel prior to approving imposed restrictions, and improving access to government quarters and rations.

Under current imposed restriction policy, there are no firm limits to the duration that an imposed restriction should last. While the initial duration of an imposed restriction is coordinated between a service member and his or her career manager, military members are not restricted from requesting extensions beyond the originally agreed to duration.⁵⁸ The end result of this type of weak control system can be members who spend inordinate amounts of time on imposed restriction, potentially creating more family instability than it should be preventing, while at the same time costing the Canadian Forces significant sums, as discussed in chapter 3. It is clear that many members are taking advantage of the lack of formal limits on imposed restriction duration and extensions when one considers twelve of the 73 respondents to the Fall 2008 Your-Say survey were identified as being on imposed restriction for a period of greater than 30 months.⁵⁹

Length of Time in Months	Frequency (n)	Percent (%)
1-10	31	42.5
11-20	17	23.3
21-30	13	17.8
31-40	5	6.8
41-50	4	5.5
51-60	2	2.7
<60 (1 response was 108)	1	1.4
TOTAL	73	100

Figure 4 – Duration of Imposed Restriction

The risks, both financial and social, associated with these long-duration imposed restriction postings could be addressed by placing firmer limits on the length of time a

⁵⁸ Department of National Defence, *CANFORGEN 019/05 – Amendment to Imposed Restriction Policy* (Ottawa: ADM (HR-Mil), 2005).

⁵⁹ Kerry Sudom, Samantha Urban, and Karen Daley, *Impact of Imposed Restriction on CF Personnel and Their Families*, Briefing Note Prepared for the Chief of Military Personnel (Ottawa: DMPORA, 17 February 2009), B-1/3.

service member could spend on imposed restriction during a single posting. As indicated in chapter two, at two years duration, the financial costs associated with imposed restriction are equal to or less than the expenditure made on two cost moves when the imposed restriction is no more than two years in duration. A two year limit would ensure the cost-neutrality of imposed restriction, while at the same time still providing the option to service members to relocate without uprooting their families. A two year limit would still accommodate many possible posting scenarios that currently depend on imposed restriction. These include year long postings for courses or training on the advanced training list, command postings for officers and senior non-commissioned members, which tend to be limited to two years duration, as well as shore postings for naval personnel. This could allow naval personnel to leave their home port for two years to fill critical staff roles in locations such as Ottawa, while allowing them to avoid the family disruption and frustration associated with moving from your home port only to return a short number of years later. While limits to the duration of imposed restriction would be the norm, there would still be a requirement to maintain flexibility with the policy and allow for the possibility for extensions if absolutely necessary. Limits to the duration of imposed restriction would hopefully reduce the numbers of personnel who would seek extensions, thereby allowing career managers and approving authorities the ability to look at extension requests with greater scrutiny. This would ensure that abuses of the policy were minimized, but still allow for cases where truly unforeseen or unexpected circumstances would lead a member to request an extension.

When Canadian Forces personnel are selected for out of Canada postings or for operational tours where they will be separated from their families for extended periods of

time, they are required to undergo an extensive screening process. While this screening process includes ensuring that numerous routine administrative details are taken care of, the process in both cases also includes psychosocial screening interviews to confirm family stability as well as the member's ability to cope with the stresses associated with operational duty or military foreign service.⁶⁰ When Canadian Forces members request that they be posted on an imposed restriction, there is no similar screening process that is undertaken. Though the addition of a screening process similar to that used for postings outside Canada may create an additional resource burden on already stretched administrative and medical staffs, there are benefits to this screening process that would have the potential to balance out any additional resource costs.

One of the benefits to conducting routine screening of personnel who request to be posted on an imposed restriction is the potential to identify individuals or families who would suffer possible negative effects as a result of a prolonged separation. This has already been identified as an area of concern by Canadian Forces human resource staffs, and an area that warrants further study and research. It is likely that screening personnel in advance of approving an imposed restriction would mitigate the lack of research that exists in this particular area and weed out those service members for whom the separation caused by imposed restriction would exact too great a toll.

Screening Canadian Forces personnel prior to authorizing them to be posted on an imposed restriction could also have the effect of avoiding authorizing related benefits in error. A screening process could ensure with greater certainty that military members

⁶⁰ Department of National Defence, *OUTCAN Screening Checklist* (Ottawa: Vice Chief of Defence Staff, 2010), 8/12.

applying for the benefits associated with imposed restriction in fact do meet the qualifying criteria identified in chapter two. Screening could also identify situations where a possible fraud could occur, thus avoiding administrative measures such as having to recover payments made to individuals who received benefits they were not in fact entitled to. This screening process could also prevent the worst case scenario of having to also take disciplinary action against an individual for fraudulently claiming imposed restriction benefits by weeding out those members who are not eligible to receive the benefits but who apply regardless. The screening process could also confirm a Canadian Forces member's intentions with regards to imposed restriction, identifying those service personnel who do not intend on reuniting with their family members except in the long term, that is those members who have made imposed restriction a "lifestyle choice".

A third policy gap that the Canadian Forces could address in order to improve the effectiveness of imposed restriction policy would be to improve access to government quarters and rations for members on imposed restriction. As was identified in chapter three of this paper, the cost of providing a service member with commercial rations and accommodations is approximately \$7000 greater on an annual basis than when they occupy military quarters and have their rations provided by the crown. Improving access to military quarters for personnel on imposed restriction would allow the Canadian Forces to minimize the costs associated this policy, while taking advantage of existing government infrastructure. Improving access to military accommodations would also take advantage of the many positive aspects Canadian Forces members noted when asked about military accommodations. As was identified in the Canadian Forces accommodation members study, personnel on imposed restriction identified a number of

factors which made the military quarters more appealing to them as an accommodation option. These included proximity to their place of work, convenience, security and privacy.⁶¹ A critical limitation to improving access to government rations and quarters for personnel proceeding on imposed restriction is the fact that due to a lack of quarters in what is the largest imposed restriction location, Ottawa, the impact of improved access elsewhere would provide little positive economic return for the Canadian Forces. Additionally, improving access at major training bases where large numbers of personnel are transients or personnel undergoing training would be difficult to achieve.

While addressing these three policy gaps could deal with some of the financial and social concerns surrounding imposed restriction policy, tackling them could bring its own pitfalls. Certainly by making the application process and extension process more rigid, there is potential for the policy to become inflexible, and for it to be applied inconsistently in some cases. By implementing a screening process similar to that used for Canadian Forces members being deployed or posted outside the country and by placing requests for imposed restriction under greater scrutiny, there will most definitely be an additional administrative and staff burden placed on both local and national human resources staffs. Finally, there is also the distinct possibility of discontent among members due to the potential restrictiveness caused by closing these policy gaps, leading to increased grievances and complaints by members, and creating an even greater administrative burden on human resources staffs.

⁶¹ Kerry Sudom, Samantha Urban, and Karen Daley, *Impact of Imposed Restriction on CF Personnel and Their Families*, Briefing Note Prepared for the Chief of Military Personnel (Ottawa: DMPORA, 17 February 2009), E-1/1.

In this chapter, a number of possibilities for improving existing imposed restriction policy while at the same time retaining its strengths have been discussed. These modifications would still maintain its consistency with the policies of the armed forces of Australia, the United Kingdom and the United States, but have the potential to make imposed restriction more efficient and cost effective. By limiting the duration of imposed restrictions and making the extension process more proscribed the military can better monitor those who take advantage of the policy and can better control costs. By adding a screening process similar to that used for overseas postings or operational deployments the Canadian Forces can ensure that personnel whom separation will affect negatively are identified and are not adversely impacted by being posted on imposed restriction. Finally, by improving accessibility to military rations and quarters the military can leverage existing infrastructure and at the same time maintain better control over imposed restriction costs.

CHAPTER 7 – CONCLUSION

This paper has examined Canadian Forces imposed restriction policy with a view to confirming its relevance and its effectiveness as a human resource management tool and retention tool. The first chapter identified some of the key demographic challenges facing the Canadian Forces in the years to come. These included an aging workforce, a decreasing birth rate and a decreasing rate of growth of the Canadian population.

Canadian employers, including the military, may face challenges in the future particularly in areas such as increased employee turnover, with employee retention and recruiting will likely become even more challenging in the future. Additionally, the first chapter of this paper indicated that the increasing numbers of dual income families in Canada are leading military spouses and partners to expect and desire to be suitably employed. Dual income families are becoming the norm because of factors such as the rising cost of living and the desire for both partners to achieve fulfillment in their careers. The significance of dual income families is also being addressed by changes to private sector policies and practices as briefly discussed in chapter five. Concurrently, the Canadian Forces career management system maintains the continual movement of its personnel through postings, leading to the possibility of conflict within Canadian Forces families as it relates to employment opportunities for military members' spouses.

The second chapter provided definitions of key terms used in the paper and most importantly laid out what exactly imposed restriction is and why its Canadian Forces members request it. This is particularly relevant when looking at the increase in dual income families, and the potential effect that spousal discontent can have on a member's desire to remain in the military.

The paper then went on to examine who imposed restriction users are, their motivations and the considerations that they identify as being important to them when making the decision to request imposed restriction. It also identified the financial costs associated with the policy, and identified a duration for which it is in fact cost-effective (or at worst cost-neutral). The third chapter went on to examine research gaps that military human resources staffs are interested in examining to determine with more precision the social costs associated with posting personnel on imposed restriction and separating them from their families for extended periods of time.

Next the paper examined the policies of the Australian, American and British militaries relating to relocation and separation from families and partners. When examining the policies of Canada's allies, it is clear that policies similar to imposed restriction are in place to deal with challenging family circumstances where it may not be possible or desirable to move a service member's dependants. Canadian Forces' imposed restriction policy is consistent with the policies in place in other similar armed forces, and the benefits offered by the Canadian Forces are in most cases comparable to those offered by other nations. Common areas of research between Canada and its allies include attitudes of members and spouses towards the military, issues of spousal employment and family disruption and finally misuse and abuse of the benefits available to service members who are separated from their dependants.

Chapter five examined human resource practices in private industry that are comparable to those offered by the Canadian Forces. Clear similarities exist in terms of acknowledgement of the demographic challenges presenting themselves in the Canadian workforce, particularly with the growth of dual income and dual career families. That

being said, rather than instituting policies and practices that would create scenarios similar to imposed restriction, the focus in the private sector has been to attempt to engage the employee's spouse or partner and provide some sort of compensation framework for them that supports the spouses' continued employment at the employees new place of work. The private sector has clearly identified that spousal engagement and support is critical to successful relocations, although it goes about it in ways that are different from the Canadian Forces approach.

The final chapter of the paper looked at possible adjustments to imposed restriction policy that would address some of the current policy's inefficiencies. Limiting the duration of imposed restrictions and making the extension process more proscribed, adding a screening process similar to that used for overseas postings or operational deployments the Canadian Forces and improving accessibility to military rations and quarters the can allow the military can better monitor those personnel who take advantage of the policy and can better control costs.

It is clear that based upon the demographic challenges facing the Canadian Forces in the near future as well as the motivations of Canadian Forces members that imposed restriction is an effective policy that needs to be retained either in its current form or possibly modified slightly to improve its efficiency. When considering the need to retain highly trained personnel, as well as the increase in dual income families, it is clear that a policy such as imposed restriction does much to improve satisfaction levels among both service members and their families. As a policy, it is consistent with the separation and relocation policies of like-minded military forces such as those of Australia, the United Kingdom and the United States. While not directly comparable to the policies in

existence in the private sector, it nevertheless serves to address the same demographic concerns facing both the public and private sectors. By addressing issues that can create spousal or family discontent, such as family disruption and spousal employment, imposed restriction proves itself as an effective retention tool for the Canadian Forces by mitigating the effects of frequent and repeated relocations. While there is certainly some room for improvement in order to better manage the financial and potential social costs associated with the policy, it is clear that Canadian Forces imposed restriction policy achieves its goals for which it was established in an effective manner and must not be eliminated simply in a short sighted effort to reduce costs to the Canadian Forces.

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