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RCAF LOGISTICS OFFICERS SUCCESSION PLANNING: VALIDATING THE NEED FOR CHANGE

Maj Amanda Aldous

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VALIDATING THE NEED FOR CHANGE**

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RCAF LOGISTICS OFFICERS SUCCESSION PLANNING: VALIDATING THE NEED FOR CHANGE

AIM

1. The incoming A4, in discussion with Logistics Branch peers and leadership, has drafted a directive on Royal Canadian Air Force (RCAF) – Logistics Officers Succession Planning, which proposes a change to the current methodology used to succession plan key RCAF Logistics Officers¹. This service paper will validate the change requirement by identifying issues with the current approach and by discussing the values and expectations of the Branch, manning considerations, and the importance of transparency and credibility (within the Branch and with operators/other elements), with trust as the key centre of gravity. It will conclude by recommending ways to manage this change effectively, thereby ensuring an improved succession planning process is efficiently implemented within the confines of the greater Logistics Branch Succession Management directive and process.

INTRODUCTION

2. The need for formal succession planning is seen in both the public and private sectors as a key enabler for ensuring continuity and success. Within a hierarchical organization such as the RCAF it is particularly important to ensure institutional success through the proper selection and

¹ Luc Girouard, “Draft: RCAF – Logistics Officers Succession Planning Directive.” 2018.

development of future leaders². As described in RCAF Doctrine, the generation and employment of personnel with the requisite training and experience into the right positions are the optimal time are critical to achieving operational success.³ This principle of human resources management must also be applied to strategic succession planning for senior RCAF Logistics Officers in order to maintain effectiveness and credibility, and to meet air power characteristics and tenets such as support dependency, flexibility, versatility and priority⁴. As the RCAF continues to face manning shortages, recruitment and retention challenges and an increasingly complex operating environment characterized by workforce heterogeneity⁵, talent management through succession planning will be vital to mission and institutional success.

3. Despite efforts of previous RCAF Logistics leadership, RCAF Logistics Officers are currently struggling to compete against Army and Navy peers for key Command and Staff appointments across the Canadian Armed Forces (CAF)⁶. As described by the RCAF Commander, expertise is best exercised across the CAF when senior leadership is representative of all three services.⁷ He notes, however, that the RCAF can only make this contribution if senior Air personnel are competitive with their Army and Navy peers.⁸ Though Air Logisticians are competing well within the RCAF at Wing-level ranking boards, using the current model they are struggling to compete against personnel from the two other elements at national-level Logistics

² Department of National Defence, A-PA-005-000/AP-005, *Leadership in the Canadian Forces: Leading the Institution* (Ottawa: DND Canada, 2007), 139.

³ Department of National Defence, B-GA-400-000/FP-100, *Royal Canadian Air Force Doctrine* (Ottawa: DND Canada, 2016), 27.

⁴ *Ibid.*, 15-17.

⁵ Andres Hatum, *Next Generation Talent Management: Talent Management to Survive Turmoil* (New York: Palgrave Macmillan, 2010), 2.

⁶ Brent Maurice, conversation with current RCAF Logistics Officers Career Manager, 26 January 2018.

⁷ Michael J. Hood, "Why Canadian Airmen are not Commanding," *Canadian Military Journal* 11, no. 3 (2011): 47.

⁸ *Ibid.*

Branch boards for senior positions, thereby limiting amount of RCAF Logistics expertise and influence in the higher echelons of leadership.

DISCUSSION

4. To date RCAF Logistics Officer Succession Planning, an environmental responsibility, has been conducted informally when compared with that of the Army and Navy, using an approach that has often been viewed as ‘ad hoc’. Since the leadership of Army Logistics formalized and improved its own succession planning, senior Army Logistics Officers have been more successful at merit boards and are being selected more frequently for key positions than their RCAF counterparts⁹. While RCAF Logistics Officer merit board scoring criteria are circulated and Officers have a general idea of what their career path should include, the actual succession planning process is conducted somewhat shortsightedly in comparison with the other elements. The current approach focuses effort on identifying short term solutions for key position vacancies and is often heavily influenced by an individual’s personal authority (reputation and credibility) rather than their overall competence and experience.¹⁰ Such a process misses the true intent of succession planning, in that it is too focused on micro-level solutions to identify patterns at the macro-level, and then develop a strategic plan in turn.¹¹ This approach creates opportunities for Logisticians to distrust the system and their superiors, and also creates situations that are at high risk for failure should the wrong person be selected for a key position.

⁹ Brent Maurice, conversation with current RCAF Logistics Officers Career Manager, 26 January 2018.

¹⁰ Ross Pigeau and Carol McCann, “Re-conceptualizing Command and Control,” *Canadian Military Journal* 3, no. 1 (2002): 55.

¹¹ Charles Greer, *Strategic Human Resource Management: A General Managerial Approach* (New Jersey: Prentice Hall, 2001), 150.

This results in a lack of credibility with Army and Navy Logisticians and particularly with the operators who rely on the Branch to provide leaders with the right experience to enable their operations.

5. In order to improve these outcomes and ensure that RCAF Logisticians are being developed into competitive leaders who can be selected for such key positions, a new directive for RCAF Logistics Officers Succession Planning was drafted. This directive includes the creation of Regional Representatives, made up of senior logisticians on RCAF Wings, who will exist alongside RCAF Logistics Specialty Advisors. These representatives will be responsible for communication with members and their local chains of command, and will then inform the Specialty Advisors and senior RCAF logisticians on their officers' circumstances and interests¹². The approach also includes a new information sheet for identified members to complete, plus revised scoring criteria for merit boards to express Branch values and expectations, which will assist in creating a Common Operating Picture.¹³

6. There are several reasons that this change is required for RCAF Logistics Officers to become more competitive from both a promotion and selection perspective. First, it will assist those members identified as having high levels of potential in understanding the values and expectations of the Branch. Succession planning is an offer: *both* the member and the Branch must agree that their potential is desirable and that their career will be succession planned. Thus, it is essential that any individual receiving a formal offer of succession planning understand the expectations that their acceptance dictates. The scoring criteria proposed¹⁴ clearly outlines the

¹² Luc Girouard, "Draft: RCAF – Logistics Officers Succession Planning Directive." 2018.

¹³ Ibid.

¹⁴ Ibid.

standard performance and potential items expected such as completion of higher education levels and maintenance of second language profiles, but also score potentials for items the Branch values such as geographic mobility and flexibility. By outlining these expectations both in the scoring criteria, in the directive and through the Regional Representatives and Specialty Advisors, the RCAF Logistics Branch leadership will ensure that personnel accepting an offer of succession planning understand the requirements and values they are expected to meet and uphold, and thus will ensure that common intent is communicated across all levels.

7. The new succession planning approach will also better address the many manning considerations the RCAF Logistics Branch leadership is currently struggling with. Due to the gap between established number of Logistics Officers and actuals across the Branch and in the specialties, senior leadership is often taking a reactive posture to human resources issues such as operational tempo, position vacancies, and retention. This becomes a cyclical issue – because the current approach is short-sighted, these long-term challenges are not addressed or resolved, and the cycle begins again¹⁵. The new approach will allow Regional Representatives, Specialty Advisors and senior leadership to look out on a 3-5 year time frame, identifying upcoming key vacancies or desirable positions and mapping out a plan for succession planned individuals. This will help personnel feel valued, challenged and will increase job satisfaction while minimizing burn out of high performers, while at the same time allow for a more pro-active and strategic approach to vacancy filling for key positions.

8. The change will also greatly assist in transparency. Because the current system is seen as ad hoc and mysterious, personnel are often confused and concerned about the decision-making

¹⁵ Kathleen Quinn Votaw, *Solve the People Puzzle: How High-Growth Companies Attract and Retain Top Talent* (Charleston: Advantage, 2016), 24.

processes surrounding regarding their career path. It is essential for RCAF Logistics leadership to be honest and transparent in their actions and decisions¹⁶, and to demonstrate fairness and justification for decisions taken when possible. By conducting succession planning in a more open manner, succession planned personnel will be better able to understand why certain decisions are made regarding their career and manage their own expectations, and they will in turn be able to more ably communicate a response back to leadership should there be a concern. Though competitive, there is no requirement for succession planning to be secretive in nature.

9. Finally, the change – having improved all the aforementioned areas – will greatly increase communication both up and down the chain of command and with key stakeholders, which will in turn improve the levels of trust felt by all. Trust is the centre of gravity in succession planning. RCAF and Logistics Branch leadership must be able to trust that the people they have identified, trained, prepared and advocated for will be able to perform at a high level as future leaders. Likewise, personnel who are being succession planned must be able to trust that the leadership does in fact have a plan for them, and be able to communicate their own career ambitions and personal circumstances as much as possible within that plan.

10. The RCAF Logistics Officer community faces several risks if a new, more formalized approach to succession planning is not adopted. At macro level, there is significant cost of leadership failure to both the institution and the individual.¹⁷ At an institutional level, if the future RCAF Logistics leadership is not selected carefully and given the correct opportunities to develop, credibility with the other services and the operators the Branch supports will be lost.

¹⁶ Kathleen Quinn Votaw, *Solve the People Puzzle: How High-Growth Companies Attract and Retain Top Talent* (Charleston: Advantage, 2016), 162.

¹⁷ Nat Stoddard and Claire Wyckoff, *The Right Leader: Selecting Executives Who Fit* (New Jersey: John Wiley & Sons, Inc., 2009), 5.

Thus far the Branch has been fairly lucky in that the individuals selected without significant strategic thought have been capable of taking on the challenges presented to them, but the risk is too high for this method to remain the status quo. Putting an individual who doesn't have the requisite training, experience and capability into a key position could lead to mission failure, and a loss of trust from an operations focused organization requiring logistics expertise. Further, the impact to the individual must also be considered. If personnel are not prepared for the significant challenges they will face in today's CAF, the organization risks breaking them or losing them. Personnel being considered for senior key appointments must be selected carefully and within a longer-term plan that is shared by all. To do otherwise is a disservice to the RCAF Logistics Officers within the Branch and could lead to retention issues either through mistrust, lack of job satisfaction or burn out.

11. While this new directive will be beneficial for the progression of RCAF Logistics Officers, it must be noted that individuals – even those in the CAF who are used to challenging situations that require frequent adaptation - typically resist change¹⁸. When approaching procedural or structural change, identifying the requirements of change management – and the skills required to implement those requirements – is essential. These skills include anticipating the future, facilitating changes and developing organizational activities¹⁹. In proceeding with the new organization-wide succession planning mindset, successful change management driven by senior leadership is key²⁰ will be key to its successful implementation. One of the challenges to this will be the establishment of buy in from all levels and areas of leadership, including the

¹⁸ Department of National Defence, A-PA-005-000/AP-005, *Leadership in the Canadian Forces: Leading the Institution* (Ottawa: DND Canada, 2007), 92.

¹⁹ Charles Greer, *Strategic Human Resource Management: A General Managerial Approach* (New Jersey: Prentice Hall, 2001), 150.

²⁰ Andres Hatum, *Next Generation Talent Management: Talent Management to Survive Turmoil* (New York: Palgrave Macmillan, 2010), 18.

RCAF, Logistics Branch and Director Military Careers. Having the endorsement of these significant parties will be essential to ensure that not only is a consistent way forward is being passed, but also that the overlapping areas of responsibility do not create confusion or friction for key players²¹, which would in turn result in confusion and frustration of the succession planned individuals trying to understand their new system.

12. Benefits of the new RCAF Logistics Officers Succession Planning Directive are easily identifiable. This new approach includes long understood best practices of talent management from both the private and public sectors, such as planning 3-5 years out, ensuring full involvement, fostering open and ongoing dialogue and using agreed-upon selection criteria and formal assessment processes.²² The change will improve communication between senior RCAF Logisticians and key stakeholders, succession planned Officers and local chains of command, and will provide members with better insight into the expectations of the Branch. It will also allow senior leadership to be more proactive in identifying longer term plans for succession planned individuals, which will help ensure they get the training and experience they require. This will foster trust not only from the member up to leadership, but also will assist in maintaining credibility with senior Army and Navy Logisticians, as well as the operators who rely on logistics expertise.

²¹ Michael Jeffery, *Inside Canadian Forces Transformation: Institutional Leadership as a Catalyst for Change* (Kingston: Canadian Defence Academy Press, 2009), 95.

²² Nat Stoddard and Claire Wyckoff, *The Right Leader: Selecting Executives Who Fit* (New Jersey: John Wiley & Sons, Inc., 2009), 251.

CONCLUSION

13. As the CAF workplace demographics and operating environment continue to evolve, change is required to meet both new and old institutional demands. Personnel shortages will continue to be a significant challenge for all occupations within the CAF, including RCAF Logistics Officers. As such, the succession planning process internal to RCAF Logistics must improve to better identify, prepare and compete these individuals as senior leaders. To do so, the aforementioned elements of values and expectations of the Branch, manning considerations, transparency, communication and trust must be carefully contemplated and included in the change. Personnel identified for succession planning must be provided great management through coaching and mentorship, feedback and opportunities to develop, but must also be able to trust in senior leadership²³ that their needs and the needs of the CAF are being balanced. In order to ensure this, communication of the changes to succession planning methodology must be clear, driven from the top, and must include the reasons *why* the change is necessary, *when* it will be implemented and *how* the changes will impact succession planned personnel.

RECOMMENDATION

14. It is recommended that under the oversight of the Strategic Joint Staff J4 and under the careful management of the 1 Canadian Air Division A4, the new directive should be released to succession planned RCAF Logistics Officers as soon as possible once it is finalized. A

²³ Kathleen Quinn Votaw, *Solve the People Puzzle: How High-Growth Companies Attract and Retain Top Talent* (Charleston: Advantage, 2016), 170.

communication strategy should be created, with input from key stakeholders²⁴, to ensure that the change is communicated in a direct and effective manner. It is particularly essential that specific terms of reference (TOR) are developed for Regional Representatives, Specialty Advisors, and Career Managers to minimize confusion and overlap and to assign areas of responsibility. These TORs should be distributed, along with the directive, a vision statement, new scoring criteria, information sheet, for both member understanding and Branch transparency. By distributing such a package, the RCAF Logistics leadership will take control of the leadership of this change, which will lead to more efficient and effective implementation and an improved succession planning process established in anticipation of the 2018 merit boards. Within a short time period, the RCAF leadership should expect to see an improvement with the success of their Logisticians at national merit boards and in the selection of key Command and Staff appointments.

²⁴ Department of National Defence, A-PA-005-000/AP-005, *Leadership in the Canadian Forces: Leading the Institution* (Ottawa: DND Canada, 2007), 93.

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