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Improving Extended Leave Options for the CAF

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Solo Flight

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IMPROVING EXTENDED LEAVE OPTIONS FOR THE CAF

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IMPROVING EXTENDED LEAVE OPTIONS IN THE CAF

In the recent decade, the military has struggled to recruit and retain personnel in an increasingly competitive job market and changing demographic. The Auditor General reported that the CAF had a shortage of 2300 personnel in 2011-12, which widened to 4200 personnel by 2015-16.¹ Employers are realizing they must offer competitive benefits to attract and retain talented individuals in their organizations, such as offering extended leave or sabbatical opportunities.² Strong, Secure, Engaged (SSE) recognizes that the CAF must have a comprehensive benefits package and increase career flexibility. This paper will argue that to remain competitive within the job market and to reach the objectives of SSE and CAF preferred personnel levels, the CAF should offer greater options for extended leave through the adoption of a leave with income averaging (LWIA) policy. The Pal model for policy analysis will be used to demonstrate that such a policy change is possible and would provide members an additional avenue to take time off for their personal goals and circumstances, be a mechanism for improving recruiting, retention and moral, and hence be in the benefit of the CAF.

The model of policy analysis proposed by Leslie Pal consists of three steps; defining the problem, defining the goal, and defining the instruments that must be used to achieve the goal.³ This model for policy analysis is intuitive and should achieve the goal of exploring the problem

¹ Office of the Auditor General of Canada, *Report 5-Canadian Armed Forces Recruitment and Retention-National Defence*, last accessed 24 May 2021. https://www.oag-bvg.gc.ca/internet/english/parl_oag_201611_05_e_41834.html

² Soulaima Gourani, "Why Employers Should Embrace Sabbatical Leave Programs," *Forbes* (Forbes Magazine, January 24, 2020), last accessed 24 May 2021. <https://www.forbes.com/sites/soulaimagourani/2020/01/24/why-employers-should-embrace-sabbatical-leave-programs/?sh=1cd34b8d7c05>

³ Leslie A. Pal, "Policy Analysis: Concepts and Practice," in *Beyond Policy Analysis: Public Issue Management in Turbulent Times*. (Toronto: Nelson, 2014), 7, last accessed 24 May 2021. https://mars.cfc.forces.gc.ca/CFCLearn/pluginfile.php/21186/mod_folder/content/0/policy_analysis_concepts_and_practice_1-36%20%281%29.pdf?forcedownload=1

of providing extended leave in the CAF. The Pal model starts with defining the problem as being central to reaching a common understanding that something is wrong and needs to be changed.⁴

A policy change must then have goals or objectives to address the problem. Once these first steps are defined, the final step is to determine what policy instruments are available to meet the goals and therein resolve the problem. Underlying this process is that the public interest is the most important value in developing public policy.⁵

DEFINING THE PROBLEM

The central problem is that the CAF has not met its preferred personnel levels. These personnel short falls create difficulties in force generation and force employment.⁶ As a military organization the CAF does not have many options of hiring members directly from industry, and the personnel levels of the CAF are primarily a function of recruitment and retention.⁷ To increase personnel levels, the CAF must fundamentally recruit (intake) people at a greater rate than it releases (outtake). Factors for recruitment and release are multi-fold, but a key assumption in this paper will be that certain elements of the CAF's benefits package could be improved to increase recruiting, moral, and retention; based on employment trends that are occurring external to the military. SSE states that "The Canadian Armed Forces' competitive compensation package goes beyond an adequate salary and includes a wide range of benefits, recognition, care and

⁴ *Ibid.*, 7.

⁵ *Ibid.*, 9.

⁶ Office of the Auditor General of Canada, *Report 5-Canadian Armed Forces Recruitment and Retention-National Defence...*, https://www.oag-bvg.gc.ca/internet/english/parl_oag_201611_05_e_41834.html

⁷ National Defence, *Recruitment and Retention in the Canadian Armed Forces in Supplementary Estimates B 2019-20 – Appearance of the Minister of National Defence Before the Standing Committee on National Defence*, last accessed 24 May 2021. <https://www.canada.ca/en/departement-national-defence/corporate/reports-publications/proactive-disclosure/supplementary-budget-b-2019-2020/other-issues/personnel.html>

support throughout military members' careers."⁸ It continues by stating the following required initiatives:

- Develop and implement a comprehensive Canadian Armed Forces Retention Strategy to keep our talented people in uniform with a welcoming and healthy work environment.
- Undertake a comprehensive review of conditions of service and career paths to allow much more personalized career choices and flexibility.⁹

Despite these SSE objectives, CAF service tends to be inflexible and centers on a predictable and rigid career development path. Long engagement contracts, frequent relocations, a strict regulatory environment, operational requirements and deployments, the code of service discipline and the conservative military institutional culture tend to run in the opposite direction of flexible work practices. This has real implications, as one study showed that the impact of service life on family and personal life was 64% of reasons for leaving military in the UK. The leading external reason for leaving the CAF was cited as a lack of energy or motivation, or the need for a break or change. The top internal reason for leaving the CAF was job dissatisfaction, with work-life balance, organizational cynicism, and burnout being other areas of concern.¹⁰ These factors are not unique to the CAF, as studies in the United States Navy have shown that high-operational tempo and long deployments have left some officers tired and weary in their careers. An improving economy intersecting this has left the USN with its greatest shortage of Officers since the Vietnam war, with similar effects in its junior ranks.¹¹ All of these factors

⁸ National Defence, *Strong, Secure, Engaged*, last accessed 24 May 2021. <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/canada-defence-policy.html>

⁹ *Ibid.*

¹⁰ Nicholas Bremner, Ph.D. and Glen Budgell, Ph.D., "The 2016 CAF Retention Survey: Descriptive Analysis" (Ottawa: Human Resource Systems Group, Ltd, 2017), 24, quoted in Amanda Huddleston, "Canadian Armed Forces Retention: A Wicked Problem?" (master's thesis, University of Manitoba), 41, last accessed 24 May 2021. https://mspace.lib.umanitoba.ca/bitstream/handle/1993/34939/Huddleston_Amanda.pdf?sequence=1

¹¹ Guy M, Snodgrass, "Keep a Weather Eye on the Horizon: A Navy Officer Retention Study." *Naval War College Review* 67, no. 4 (Autumn, 2014), last accessed 24 May 2021. <https://search-proquest-com.cfc.idm.oclc.org/scholarly-journals/keep-weather-eye-on-horizon-navy-officer/docview/1559528022/se-2?accountid=9867>

point to a problem of worker fatigue, a lack of flexibility, and the need for a basic relief valve where personnel could take a break and re-group. In contrast, flexible benefits are becoming increasingly popular in the civilian workplace and are shown to have positive impacts on employee performance.¹² There are broad definitions of flexibility, ranging from flexible work hours, working from home, or extended time off and sabbatical opportunities.

Recent research from the Harvard Business Review has shown that sabbaticals are growing in corporate America. Various forms of paid or un-paid sabbaticals were available in 17% of employers in 2017. Two primary positive benefits of sabbaticals are individual rest and the opportunities that they provide for leadership growth by providing vacancy opportunities. The CAF does not necessarily have the latter as a challenge with existing vacancies abounding, but the former topic of rest is important. Research showed that individuals that proceeded on sabbaticals experienced a decline in stress, increase in psychological resources and overall well-being which lasted long after the sabbatical was over. Leaders who engaged in sabbaticals reported that the experience provided them time to generate new and innovative ideas and gain confidence as leaders.¹³ This was also confirmed in research on sabbaticals in the non profit sector, where “Executive directors come back rejuvenated, with a fresh vision and innovative ideas, and tend to extend their tenure with the organization.”¹⁴ There could be benefits to the application of extended leave practices to the CAF in providing time to mitigate the unique

¹² Employment and Social Development Canada, “Flexible Work Arrangements: What was heard”, last accessed 24 May 2021. <https://www.canada.ca/en/employment-social-development/corporate/portfolio/labour/programs/labour-standards/reports/what-we-heard-flexible-work-arrangements.html>

¹³ Claudio Fernández-Aráoz, Neil Pasricha and Shashank Nigam, and Deborah M. Kolb and Sharon M. Brady, “Research Shows That Organizations Benefit When Employees Take Sabbaticals,” Harvard Business Review, last accessed 24 May 2021. <https://hbr.org/2017/08/research-shows-that-organizations-benefit-when-employees-take-sabbaticals#:~:text=It's%20not%20surprising%20that%20the,sabbatical%20takers%20returned%20to%20work>

¹⁴ Deborah S Linnell and Tim Wolfred, “Creative Disruption,” last accessed 24 May 2021. <https://www.tsne.org/creative-disruption>

stressors of CAF service. In addition, the CAF as an institution is vulnerable to groupthink, and opportunities to withdraw oneself from the military institution could be a vehicle for creative injection of new ideas.¹⁵

The RAND corporation was tasked by the US Department of Defence to conduct research on the merits of an officer sabbatical program. Their findings were that programs targeting populations with the highest likelihood of changing retention behaviour were more efficient, and that programs that were a combination of small, short, and low cost had the greatest return on investment. Their findings also showed that the return on investment (ROI) benefits outweighed the cost of sabbaticals and recommended a flexible range of personal extended leave programs. Implementing such programs could have concrete impacts such as improved retention rates, but also help “reinforce the military’s reputation as a competitive, attentive, and conscientious employer.”¹⁶

Extended leave is not without its negative aspects. Some downsides can include emotional disconnection from the institution, decreased productivity during absences, administrative challenges, resentment among employees, and finally the temptation to not return to the employer on completion of the leave.¹⁷ In the CAF context, one could judge that many of these aspects already exist under other programs. For example, the CAF offers parental leave or

¹⁵ James M. Gerlach, “A Comprehensive Officer Sabbatical Program: Rethinking the Military Officer Career Path”, (Strategy Research Project, US Army War College, 2009), 12, last accessed 24 May 2021. <https://apps.dtic.mil/sti/pdfs/ADA499117.pdf>.

¹⁶ Harry J. Thie,, Margaret C. Harrell, and Marc Thibault, “Officer Sabbaticals: Analysis of Extended Leave Options.” Santa Monica, CA: RAND Corporation, 2003, xx, last accessed 24 May 2021. https://www.rand.org/pubs/monograph_reports/MR1752.html.

¹⁷ Linda Villalobos, “Employee Sabbaticals: Are They Right for Your Company?” Insperity, last accessed 24 May 2021. <https://www.insperity.com/blog/employee-sabbaticals/>

subsidized post-graduation training, which can trigger many of the downsides. Despite this, the organization can conduct these programs.

In summary, the CAF's personnel problem is complex, and one factor is a lack of flexibility related to military employment. There is documented evidence that extended leave can be a solution to improve flexibility and could be a mitigation for the stressors of military career, whilst having other benefits.

DEFINING THE GOAL

The goal in this proposed change would be to offer an extended leave policy that would benefit member flexibility and be a retention tool for the CAF. Extended leave will be defined in an approach like the public service leave with income averaging policy¹⁸ of an additional five weeks to three months of leave in addition to the annual leave policy. Selecting a lower time than five weeks could essentially fall into the existing leave or leave without pay policy of the CAF and is unlikely to require financial assistance. Selecting a period longer than three months would likely have a larger impact on the CAF, be more difficult to financially support, and would begin to fall outside the RAND study recommending shorter extended leave periods for better ROI.

Providing extended leave options of five to 12 weeks for CAF members could have several benefits for members. It could provide a rest period for members that have been deployed beyond annual and post-deployment leave. It could also provide a similar intermission in an otherwise long and uninterrupted military career. The reasons for taking this break should

¹⁸ Government of Canada. *Appendix D-Leave with income Averaging: A Special Working Arrangement in Directive on Leave and Special Working Arrangements*, last accessed 24 May 2021. <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=15774#appD>

remain flexible, which would allow members the option to use it for rest, travel, education, other work, or other personal goals. The goal should be to minimize the financial hardships of taking extended leave, within the limits that is institutionally and culturally acceptable within the CAF and Canada.

Having considered the benefits to the individual, we now turn to the important question of whether this change in policy is within the public interest, or by extension the benefit of the CAF. Three main goals of SSE are to develop a comprehensive retention strategy, have a welcoming and healthy work environment, and to review conditions of service to allow much more personalized career choices and flexibility.

In the private sector flexibility and options for extended leaves or sabbaticals are being increasingly seen as a benefit in a comprehensive retention strategy. In a pure competitive sense, by not offering such extended leave options the CAF is losing a competitive edge to both industry and the public service. Having equal opportunity for extended leave would be one less argument for leaving the CAF. This is a common and recurring theme, suggested in retention papers dating back to 2001.¹⁹ Of three major factors influencing retention: quality of work, quality of life, and quality of leadership,²⁰ we are considering extended leave as an improvement to quality-of-life.

The health benefits of leave and extended leave are documented.²¹ They present an opportunity for a full break from service, to recharge physically and emotionally. These

¹⁹ Christopher Ankersen, Losel Tethong, "Birds in Hand: The Need for a Retention Based Strategy for the CF," *Canadian Military Journal*, Volume 2, Number 2 (Summer 2001): 48, last accessed 24 May 2021. <http://www.journal.forces.gc.ca/vo2/no2/doc/43-49-eng.pdf>

²⁰ Sminchise, Vasile. "Military Retention: A Comparative Outlook," *Journal of Defense Resources Management* 7, no. 1 (2016), last accessed 24 May 2021. <https://search-proquest-com.cfc.idm.oclc.org/scholarly-journals/military-retention-comparative-outlook/docview/1806428878/se-2?accountid=9867>

²¹ Claudio Fernández-Aráoz *et al*, "Research Shows That Organizations Benefit When Employees Take Sabbaticals,"...

experiences are reported as being enriching and participants often report coming back more creative after having the time to reflect on their experiences and come back with innovative ideas.²² If anything, offering or enabling extended leave could be a middle ground solution for individuals desiring an extended break but not being ill to the point of requiring medical leave.

In terms of career options and flexibility, one could consider that extended leave would simply improve career flexibility. Rather than looking at releasing from military with an immediate annuity as the solution to providing time off, why not allow members to undertake their personal objectives while keeping them in service? This could also be a transition mechanism, where a member could trial retirement under extended leave prior to fully committing to it. If a member desired to work outside of the CAF, extended leave could be a solution rather than requiring a full release and the administrative effort to re-enroll the person.²³

DEFINING THE INSTRUMENT

In this section, we will look at the current CAF instruments that permit extended leave and consider an alternate option of the public service leave LWIA. The CAF currently has a leave without pay policy (LWOP):

“The purpose of Leave Without Pay and Allowances (hereafter referred to as LWOP) is to allow members the opportunity to remain in the CF during periods when no service is rendered. Except on enrolment, members must request LWOP. The reason for the LWOP must be in the interest of the CF.”²⁴

²² *Ibid.*

²³ Sminchise, Vasile. "Military Retention: A Comparative Outlook," *Journal of Defense Resources Management* 7, no. 1 (2016)..., 97.

²⁴ Department of National Defence, A-PP-005-LVE/AG-001, *Canadian Force Leave Policy Manual*, 8.1.01, last accessed 24 May 2021. <https://www.canada.ca/content/dam/dnd-mdn/documents/military-benefits/canadian-force-leave-policy-manual/2020-12-04-canadian-forces-leave-policy-manual.pdf>

The policy allows taking LWOP for parental reasons, academic/training, or personal reasons. For members requesting beyond 30 days, the request must be forwarded to Director General Military Careers (DGMC) with a recommendation from both the CO and the Officer Commanding a Command. This provides a mechanism for CAF personnel to take extended leave; however, it is uncompensated thereby placing the financial burden on the CAF member.

It is also subject to numerous conditions and levels of approval under section 8.1.06:²⁵

- the reason for the LWOP;
- whether the CF can forego the services of the member for the period of LWOP;
- whether there are better alternatives to achieve the aim;
- the performance and conduct of the member;
- whether there will be significant periods during the term of LWOP when the member, upon request, could be returned to duty;
- whether the period of LWOP should be counted for promotion purposes with reference to CFAO 11-6, Commissioning and Promotion Policy Officers-Regular Force or CFAO 49-4, Career Policy Non-Commissioned Members Regular Force;
- whether or not the requirements of DAOD 5019-8, Private Debts should preclude granting LWOP;
- all annual and accumulated leave entitlements are used for the same purpose for which the LWOP is requested; and
- whether or not the member is undergoing a period of obligatory service.

The current LWOP policy reads that it must be in the interest of the CAF and has numerous reasons where it could be denied. It is also heavily focused on whether the reasons for LWOP are justified rather than simply allowing personal reasons and centering the decision to grant LWOP on operational requirements. This implies that command must judge the reason to be sufficient, rather than to let the member make that decision and command enable it if operational requirements permit. The policy is not written in a way that promotes extended leave but sets a tone to restrict it; and states that it must be in the CAF's best interest without amplifying what that could be. As such, the CAF's interest will fall to the judgement of the commander and DGMC, who are unlikely to approach this as a retention tool but rather focus on the short-term

²⁵ Department of National Defence, A-PP-005-LVE/AG-001, *Canadian Force Leave Policy Manual*,..., 8.1.06.

impact of losing the member. Without a policy that enables extended leave, it could have the effect of encouraging commanders to deny the leave, or potentially negatively viewing members that request it, whilst also providing no financial aid during the period. It also forces members to use all their in-year leave prior to requesting LWOP, which may not be convenient or practical for the remainder of the year, creating a barrier. One could argue that the policy is “good-enough” to provide members with an avenue to take LWOP for rare exceptions, but it is not good enough to compete with extended leave policies of some other employers. Some of the current provisions on restricting LWOP are with good reason namely that the CAF is short several thousands of personnel from full staffing. This issue compounds with other programs that take members away from duty. As such, one cannot only consider the pros of allowing an additional form of leave without weighing the cons against adding to the personnel deficits.

The scope of this paper does not permit the analysis of multiple extended leave options, so the Public Service (PS) LWIA will be considered as the prime candidate. This LWIA is the preferred instrument both because of its benefits and that policies applicable to the PS are generally easier to adopt to the CAF from a public and political perspective, based on the principle that military pay and benefits should be generally comparable to the public service.²⁶

The PS LWIA permits members of the PS to take five to 12 weeks of extended leave without pay while averaging their income over a 12-month period.²⁷ This effectively reduces the burden of the LWOP by amortizing the lack of income over a 12-month period and providing

²⁶ Department of National Defence, “Military Pay,” last accessed 24 May 2021.
<https://www.canada.ca/en/department-national-defence/services/benefits-military/pay-pension-benefits/pay/overview.html>

²⁷ Public Services and Procurement Canada, “Leave with Income Averaging,” last accessed 24 May 2021.
<https://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/services-pay-pay-services/pay-information-pay/vie-life/vie-conge-life-leave/cer-lia-eng.html>

income during the leave of absence. The approval of LWIA is dependent on the organization being able to maintain operational commitments, so it does not contravene the “benefit to the public” clause.

Having stated that the CAF has a LWOP instrument for extended leave, how does the PS LWIA bring us closer to the objective? The main difference between the two policies is the PS LWIA ability to continue paying its members during the absence and the enabling underlying tone of the policy. The member is not paid for the absence, but the income averaging mitigates some of the financial hardship by spreading the drop in income over 12 months, hence financially enabling members to take the absence. The LWIA policy also does not require the member to use all their annual leave allocation before applying for LWIA. Both effects combine to improve the policy from the member perspective, in contrast to the CAF LWOP policy, which provides no financial benefit and expects that a member will use all their annual allotment for the purpose of the leave prior to granting LWOP options. Both policies are subject to operational considerations, but the CAF LWOP is also subject to several more constraints and a judgment decision on the suitability of the reason. Ultimately, from the lens of members, the PS LWIA is a better option when compared to the CAF LWOP. Since more members would be enabled to use the PS LWIA policy, it would serve as a retention tool that competes with the PS and private companies extended leave policies.

To further consider whether this would be successful in the CAF it is possible to look at a few allied programs. The US Armed Forces implemented the Career Intermission Program in 2009 allowing members to take 12 to 36 months breaks from their military careers and advertise this as a major retention incentive.²⁸ The program provided 1/15th of pay and required the

²⁸ Military Benefits, “Career Intermission Program,” last accessed 24 May 2021. <https://militarybenefits.info/career-intermission-program/>

members to return to the military after the time off in a ratio of 1:2 months of time off to active duty.²⁹ The program authorizes up to 160 participants per year but less than half of that had participated in 2015.³⁰ The majority of participants elected to use the time to improve their education. In general, the low participation is attributed to a perceived stigma in taking time away from service.³¹ This exemplifies that even with a policy on extended leave, the stigma of using a program can remain. While not having the same implementation period of the PS LWIA, the US example does show that if anything, some members do participate in the program but not in an amount that is threatening to operational requirements, participation can be capped, and it is an opportunity for members to upgrade their education. Conversely it also shows that an implementation of such a policy may not reach that many personnel, or that more positive communication must be done to avoid the negative connotations of taking an extended leave. In the CAF's case, it is likely that such a negative stigma also exists in requesting LWOP.

Would this change from the CAF LWOP to the PS LWIA meet the goal of improving CAF personnel numbers? It has been argued that a change of the CAF LWOP policy to the PS LWIA policy would be an improvement in the instrument of granting extended leave. In that respect, this would improve retention based on recommendations by studies, allied initiatives, and corporate experience. The next step to determine if the instrument would be successful could be a limited trial or survey, to operationalize the change in a controlled fashion and learn more on real world implementation. There could also be changes made to the instrument to

²⁹ Jim Tice, "Take three years off: Army extends sabbatical program," *Army Times*, last accessed 24 May 2021. <https://www.armytimes.com/news/your-army/2015/07/06/take-three-years-off-army-extends-sabbatical-program/>

³⁰ Oriana Pawlyk, "Need a Break? Air Force Expands Sabbatical Program," *Military.Com*, last accessed 24 May 2021. <https://www.military.com/daily-news/2017/09/26/need-break-air-force-expands-sabbatical-program.html>

³¹ Andrew Tilghman, "Few takers for career intermission," *Navy Times*, last accessed 24 May 2021. <https://www.militarytimes.com/news/your-military/2014/07/23/few-takers-in-first-year-of-marine-career-sabbatical-program/>

increase retention, such as tying the options of electing the extended leave to terms of service renewals, using it as recognition, or possibly considering partial funding and longer intermissions like the US CIP model. There is no clear-cut evidence that improving extended leave options would solve the CAF's personnel problems, but it is reasonable to believe that a change which improves member flexibility, health, and makes CAF employment more competitive could improve retention. By contributing to a retention strategy and offering more career flexibility through this change, several SSE objectives would also be met and benefit the CAF.

The alternate question to ask is whether in solving this problem a worse one was created. Increasing extended leave options would have the immediate effect of contributing to personnel shortages in the short term, prior to any longer-term increase in benefits. As such, it would only be in the CAF's interest to pursue the change if there was a definite gain in recruitment, retention, or moral. Looking at this problem solely from the present personnel crisis however precludes considering options that under normal personnel levels would be possible. The CAF should be able to afford extended leave options since the CAF is built on having ample personnel redundancy to support operations while personnel are sidelined for various reasons up to and including casualties. The CAF's current success in meeting the government's mandate with existing personnel shortages reinforces this concept, as it demonstrates that the CAF can operate below preferred personnel levels. Therefore, if one assumes that the policy was implemented based on normal personnel levels, the current shortage in personnel should not be considered as a factor precluding the policy. Rather, the CAF should implement policy on where it desires to be rather than where it is, with the intent that the policy will pull the CAF in the desired direction. In this case, if this policy change resulted in improved recruitment, retention, and moral, these are all factors that could improve the CAF's current personnel shortages and enable the policy

change. As such, long term return of trialing the policy change is worth the short-term risk of more vacancies to manage. As the experience with the US CIP, the numbers of personnel requesting extended leave could be capped to mitigate this risk.

In this paper the Pal approach to policy change was used to demonstrate that the CAF's personnel shortages and SSE objectives could be improved through the provision of an improved extended leave policy. The argument put forth was that external to the CAF, employers are increasingly using extended leave and sabbaticals as part of retention strategies and to improve employee health, flexibility, and creativity. The PS's LWIA policy was evaluated as a template to change the CAF's current LWOP policy and shown to be of benefit to both members and the CAF in improving recruitment, moral, and retention. As such, this change should be trialed to assess its implementation CAF-wide.

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