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Words Matter: Why the CAF Should Remain Steadfast in Seeking to Operationalize Public Affairs Officers

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JCSP 47

Master of Defence Studies

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PCEMI 47

Maîtrise en études de la défense

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CANADIAN FORCES COLLEGE – COLLÈGE DES FORCES CANADIENNES

JCSP 47 – PCEMI 47

2020 – 2021

MASTER OF DEFENCE STUDIES – MAÎTRISE EN ÉTUDES DE LA DÉFENSE

**WORDS MATTER: WHY THE CAF SHOULD REMAIN STEADFAST IN SEEKING TO
OPERATIONALIZE PUBLIC AFFAIRS OFFICERS**

By Lieutenant-Commander Christopher Heckman

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ABSTRACT

This research project proposes that Public Affairs Officers (PAOs) employed by the Canadian Armed Forces (CAF) should assume leadership and key staff responsibilities in not only Public Affairs (PA), but Information Operations (IO) and Defence Strategic Communications (StratCom) as well. The CAF has sought to optimize its operations in the information environment (IE) in three areas: PA, IO, and Defence StratCom.¹ It is the Department of National Defence (DND), however, who is the functional authority for PA in both DND and the CAF. Despite DND and the CAF developing a plan to operationalize PAOs, DND decided to unequivocally cease all PA involvement in CAF influence activities and IO in November 2020 following a series of events that were harshly criticized by the Canadian media.² Following this decision, DND/CAF jointly released new planning guidance which gave the CAF until March 2023 to evaluate and address the underlying issues.³ The involvement of PAOs in areas beyond PA has therefore become a source of debate.⁴

This research study leverages historical and theoretical examples to show that PAOs in DND/CAF are equivalent to Public Relations (PR) professionals in the private sector, and that the same PR expertise needed to coordinate PR campaigns and lead

¹ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives* (Ottawa, ON: Government of Canada, 2020), 5.

² David Pugliese, "Military Initiative to Aim Propaganda at Public Gets Shut Down," *Chronicle – Herald*, November 14, 2020. <https://search-proquest-com.cfc.idm.oclc.org/newspapers/military-initiative-aim-propaganda-at-public-gets/docview/2460605283/se-2?accountid=9867>; see also Scott Taylor, "CAF Halts Controversial PR Plan: ON TARGET," *Chronicle-Herald (Halifax, N.S.)* 2020. <https://search-proquest-com.cfc.idm.oclc.org/docview/2461577334?pq-origsite=summon>.

³ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*

⁴ David Pugliese, "Chief of the Defence Staff Gen. Jon Vance and the Weaponization of Public Affairs," *Ottawa Citizen*, September 15, 2015. <https://ottawacitizen.com/news/national/defence-watch/chief-of-the-defence-staff-gen-jon-vance-and-the-weaponization-of-public-affairs>.

strategic communications in the private sector is also required to coordinate IO and lead Defence StratCom in the CAF. Best practices from PR theory are used to propose a new planning model that applies to PA, IO, and Defence StratCom. The new model is then used to analyze the DND/CAF PA Strategy to demonstrate how PAOs, as implementers of the strategy, have expertise that is applicable to IO and Defence StratCom as well. The paper then provides a detailed examination of the existing PA function in DND/CAF, the plan to operationalize PAOs prior to November 2020, and the evaluation plan from January 2021 to March 2023. Finally, the paper considers the most significant challenges to the overall proposition of the paper and provides recommendations on how these challenges could be overcome.

Overall, this study found that the PAOs are equivalent to PR professionals in the private sector, and that DND/CAF PA Strategy does adhere to best practices from PR theory. However, it found that criticism from the Canadian media and institutional differences between DND and the CAF have impacted how PAOs are employed in DND/CAF to a larger degree than their PR counterparts in the private sector. The greatest challenges identified were inadequate policies, concepts, and doctrine; insufficient resources in both DND and the CAF; and institutional gaps between DND and the CAF in terms of PAO employment. The overall recommendation of this paper is that the CAF should remain steadfast in seeking to operationalize PAOs and that the evaluation team should strongly consider having PAOs assume leadership and key staff responsibilities in not only PA, but IO and Defence StratCom as well.

WORDS MATTER: WHY THE CAF SHOULD REMAIN STEADFAST IN SEEKING TO OPERATIONALIZE PUBLIC AFFAIRS OFFICERS

We are tired of hearing repeated the threadbare cliché “the world has grown smaller”; this so-called truism is not actually true, by any means. The world has grown both smaller and very much larger. Its physical frontiers have been expanded. Today’s leaders have become more remote physically from the public; yet, at the same time, the public has much greater familiarity with these leaders through the system of modern communications. Leaders are just as potent today as ever.

- Edward Bernays, *The Engineering of Consent*

CHAPTER 1

CHAPTER ONE - INTRODUCTION

The Department of National Defence (DND) and the Canadian Armed Forces (CAF) are two separate organizations which, together, form Canada’s integrated defence team (DND/CAF) under the Minister of National Defence (MND). DND is led by the Deputy Minister of National Defence (DM), who coordinates ten Assistant Deputy Ministers (ADMs), each of whom are responsible for the management of the corporate functions of DND/CAF. The ADM organization responsible for Public Affairs (PA), ADM(PA), is key to this paper because it is the overall lead for PA and is responsible for the generation and employment of Public Affairs Officers (PAO) in DND/CAF.⁵

The other defence organization discussed in this paper is the CAF. The CAF is led by the Chief of the Defence Staff (CDS), who is supported by the Strategic Joint Staff (SJS). The CAF is further separated into organizations that generate forces, such as the Canadian Army, Royal Canadian Navy, and Royal Canadian Air Force, and organizations that employ those forces, such as the Canadian Joint Operations Centre (CJOC). SJS and

⁵ "DAOD 1000-10, Policy Framework for Corporate Administration Management," last modified 20 January 2017, accessed 2 May, 2021, <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/defence-administrative-orders-directives/1000-series/1000/1000-10-policy-framework-corporate-administration-management.html>.

CJOC are important to this paper because SJS is the overall lead for Information Operations (IO) and co-lead with ADM(Policy) for Defence Strategic Communications (StratCom), while CJOC is responsible for the employment of IO capabilities in support of CAF operations.⁶

These organizations are the focus of this paper because the CAF has been seeking to optimize its operations in the Information Environment (IE) in three main areas: PA, IO, and Defence StratCom.⁷ Each of these areas will be discussed in greater detail throughout the paper. For now, it is important to understand that the CAF is responsible for IO and Defence StratCom, while ADM(PA) is responsible for PA. Additionally, although ADM(PA) is responsible for generating PAOs, only about one third of all PAOs report directly to ADM(PA).⁸ The remainder report directly to whichever organization they have been seconded to, such as the CAF. Thus, as the CAF has been developing PA, IO and Defence StratCom, the role of PAOs employed by the CAF has become a source of debate.

The CAF has sought to expand the traditional role of PAOs, which focuses on informing internal and external audiences, into more military-focused activities, such as IO.⁹ For example, in 2015 the Chief of the Defence Staff (CDS) began to publicly state his desire to operationalize PA by enhancing the ability of PAOs to deal effectively with

⁶ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 18-19; see also *Ibid.*, 22

⁷ *Ibid.*, 5

⁸ Government of Canada, *Information Operations PDNA Leveling Brief* (Ottawa, ON: Government of Canada, 2020), 48.

⁹ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 10-11; see also Pugliese, "Chief of the Defence Staff Gen. Jon Vance and the Weaponization of Public Affairs."

an increasingly dynamic IE.¹⁰ This initiative was strongly criticized by Canadian media, who interpreted the CDS' intent as seeking to have PAOs adopt a more aggressive stance with media outlets if their reporting was critical of the CAF.¹¹

Despite five years of ADM(PA) working collaboratively with the CAF to realize the CDS' vision, media criticism of the CAF initiative remained consistent. This criticism reached a tipping point in November 2020, when a series of events garnered such harsh criticism from the media that ADM(PA) unequivocally ceased all PA involvement in influence activities and IO, resulting in the CAF having to 'reset' and re-evaluate its approach.¹² Seeking to reassure the Canadian public Laurie-Anne Kempton, the ADM for PA at the time, stated that "Canadians must have absolute confidence in knowing that we completely understand our role in informing the public space of our initiatives and activities...They [Canadians] must know that they are not targets."¹³ The circumstances surrounding these events and ADM(PA)'s decision will be discussed in detail in Chapter Six.

Almost immediately following ADM(PA)'s announcement, the CDS and DM released the *CDS/DM planning guidance – enhancing operational and institutional communications: resetting information-related capability initiatives*, hereafter referred to as the "CDS/DM planning guidance." This guidance will also be covered in Chapter Six, however four key points are worth highlighting now to provide a broad overview of the core issues that will be discussed in detail throughout this paper.

¹⁰ *Ibid.*

¹¹ *Ibid.*

¹² Pugliese, "Military Initiative to Aim Propaganda at Public Gets Shut Down."

¹³ *Ibid.*

First, its primary intent was to enhance Canadian trust in the CAF by directing that under no circumstances would CAF operations in the IE be directed at Canadian citizens.¹⁴ This statement represents a direct response to the sustained criticism from Canadian media and underscores that any efforts to integrate PAOs into IO and Defence StratCom must remain separate from their domestic PA role in Canada.

Second, it articulates the institutional challenges that DND/CAF have struggled with in seeking to develop PA, IO and Defence StratCom. Authorities, integration, resources, concepts, doctrine and lexicon, are recognized challenges, yet none have been sufficiently addressed to date.¹⁵ This paper will consider these topics and the underlying institutional factors impeding their progress while providing recommendations on how these issues might be resolved.

Third, the CDS/DM planning guidance seeks to establish clear lines of demarcation between PA, IO and Defence StratCom by stating that Defence StratCom is “a planning concept at the strategic echelon,”¹⁶ IO is a “coordinating staff function at lower echelons to create desired effects,”¹⁷ while PA consists of “activities to inform internal and external audiences.”¹⁸ Recognizing that these descriptions are highly abstract, this paper seeks to demonstrate that each share a common history and foundation in PR theory. What differentiates each is that Defence StratCom is strategically focused, IO is operationally focused, but PA applies at the tactical through strategic levels. As will be shown, this is one reason why PAOs are well suited for employment in all three.

¹⁴ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 2

¹⁵ *Ibid.*, 5-7

¹⁶ *Ibid.*, 5

¹⁷ *Ibid.*, 6

¹⁸ *Ibid.*

Finally, the CDS/DM planning guidance articulates a plan to re-evaluate all three of these areas between January 2021 and March 2023. Therefore, this paper seeks to inform that evaluation by providing an analysis of the DND/CAF approach to PA, insight into how the expertise of PAOs could benefit IO and Defence StratCom in the CAF, and recommendations on how some of the key challenges could be overcome.

The position of this paper is that the CAF intent to expand the role of PAOs prior to the reset was correct, and that PAOs are uniquely qualified to assume leadership and key staff responsibilities in not only PA, but IO and Defence StratCom as well.

What follows is structured into eight chapters, with this introduction being Chapter One. Chapter Two, Historical Origins, provides historical examples to show that what started as propaganda at the turn of the 19th century led to the development of PR theory before separating into two streams based on military or non-military application. The military application of PR theory led to PA, IO and Defence StratCom, while non-military application led to PR (with PA as a PR specialization focused on the public sector), PR campaign planning, and strategic communications. Despite evolving independently, each share a common history and much of the same PR theory, with *audience* and *intent* being their primary differences. Chapter Two focuses on the non-military stream as Chapter Five provides an in-depth examination of the evolution of PA, IO, and Defence StratCom within DND/CAF.

Chapter Three, Theoretical Foundations of PR and PA, examines the theoretical linkages between PR theory in the private sector and PA in DND/CAF. Several PR concepts and theories are introduced then used to synthesize a new planning model for PA, IO and Defence StratCom that is then used as an analysis tool in Chapter Four.

Chapter Four, Analysis of the DND/CAF PA Strategy, uses the newly developed model to analyze how closely the *DND and CAF Public Affairs Strategy 2018-2020* leverages best practices from PR theory. By the conclusion of Chapter Four it should be evident that the DND/CAF approach to PA is founded upon best practiced from PR theory and that PAOs, being responsible for the implementation of that strategy, are the DND/CAF equivalent of PR professionals in the private sector.

Chapter Five, The Evolution of PA, IO, and Defence StratCom in DND/CAF, provides the context required to support the proposition that the CAF intent to expand the role of PAOs was correct. It picks up where the more broadly focused historical overview from Chapter Two concludes and provides a more comprehensive analysis of how DND/CAF has sought to develop PA, IO and Defence StratCom, and what initiatives had taken place prior to the reset occurring in November 2020.

Chapter Six, Case Examples and a New Plan, offers a detailed look at the events that preceded the decision to cease PA involvement in CAF influence activities and IO. Additionally, Chapter Six examines the CDS/DM planning guidance in greater detail and outlines the 2021-2023 evaluation plan before Chapter Seven seeks to inform that evaluation plan by identifying challenges and providing recommendations.

Chapter Seven, Challenges and Recommendations, focuses on identifying the most significant challenges if the evolution team were to consider what is proposed in this paper, while offering recommendations on how these challenges could be overcome.

The final chapter consists of a conclusion to summarize the key findings presented in this paper.

Please note that a comprehensive glossary has been included as Annex A. It is recommended that the reader review the full descriptions of IE, IRCs, PA, IO and

Defence StratCom at Annex A for additional detail on the topics being discussed.

Similarly, please note that all acronyms used throughout this document have been listed in alphabetical order at Annex B.

CHAPTER TWO – HISTORICAL ORIGINS

Even governments to-day act upon the principle that it is not sufficient to govern their own citizens well and to assure the people that they are acting whole-heartedly in their behalf. They understand that the public opinion of the entire world is important to their welfare.

- Edward Bernays, *Crystallizing Public Opinion*

Introduction

While other authors will be referred throughout this paper, this chapter will begin by introducing three of the most influential as their works will be referenced extensively in Chapters Two and Three. Afterward, historical examples will be used to illustrate a shared history between PR (with PA as a subset), IO, strategic communications, and Defence StratCom. While *audience* and *intent* differentiate each along military and non-military lines their common history has resulted in them also sharing much of the same theory, with PR theory in particular being applicable to all.

Key academic contributors

American journalist Walter Lippmann is known as the “father of modern American journalism” for his contributions to the field.¹ Lippmann’s book *Public Opinion*, published in 1922, is his primary work cited in this paper. *Public Opinion* expands well beyond journalism in its contemplation of how democratic societies are impacted as governments, organizations, and the media use propaganda techniques to influence public opinion. Lippmann’s definitions of public opinion and public affairs remain the foundation for modern interpretations and his insights on government

ensorship of the media provide insight into why the Canadian media remain highly critical of DND/CAF efforts to operationalize PAOs.

Edward Bernays wrote extensively on PR and propaganda, earning him recognition as the “father of public relations.”¹ Bernays was particularly adept at applying knowledge from psychoanalytic theory, much of which came from Sigmund Freud (who was Bernays’ uncle), into his development of PR theory. This paper will refer to material found in several of his works, including *Crystalizing Public Opinion*, written in 1923, *Propaganda*, written in 1928, and *The Engineering of Consent*, written in 1955 but updated and republished 1986. Bernays spearheaded efforts to have PR recognized as a professional vocation and developed much of the PR theory still being used today.

Professor Anne Gregory, PhD, is a Professor of Corporate Communication at the University of Huddersfield after having served 20 years as a Professor and Director of the Centre for PR Studies at Leeds Business School. She was also the President of the Chartered Institute of Public Relations (CIPR), the largest professional PR and communications management body in Europe. Finally, she is the consultant editor for the CIPR/Kogan Page series of PR books, from which one of Dr. Gregory’s books, *Planning and Managing Public Relations Campaigns*, published in 2010, will be cited in this paper.

In the beginning, there was propaganda

The first recorded use of the term propaganda has been traced back to the Catholic Church in the 17th century where it was used as a means to spread ideas and values about the faith.¹⁹ Its employment was relatively disorganized, with small groups trained in early

¹⁹ Philip M. Taylor, "Munitions of the Mind: A Brief History of Military Psychological Operations," *Place Branding and Public Diplomacy* 3, no. 3 (2007), 197. doi:<http://dx.doi.org.cfc.idm.oclc.org/10.1057/palgrave.pb.6000064>. <https://search-proquest-com.cfc.idm.oclc.org/scholarly-journals/munitions-mind-brief-history-military/docview/232157988/sc-2?accountid=9867>.

psychology sharing a common narrative but acting independently within separate geographic regions. At the time the employment of propaganda did not carry a negative or positive connotation. It was simply considered “the means by which the converted attempted to persuade the unconverted.”²⁰ This interpretation remained largely the case until the turn of the 20th century, when advancements in communications technologies such as the radio, enabled unprecedented efficiencies in the generation and distribution of information amongst large audiences. Academic theory merged with applied sciences, such as cognitive psychology and sociology, and by 1914 a body of ‘modern’ propaganda theory had been developed. This form of propaganda, having been fully separated from its connection with religious conversion, was redefined as “the deliberate attempt to persuade people to think and behave in a desired way.”²¹

The impact of the First World War

The potential for governments, the military, private organizations, and the media to leverage new communications technologies to influence²² others was immediately recognized, with the First World War serving as a proving ground for the newly developed body of propaganda theory. The First World War therefore served as a grand experiment to determine the efficacy of newly developed propaganda when applied at an unprecedented scale and in a highly complex environment.

²⁰ Philip M. Taylor, *Munitions of the Mind: A History of Propaganda from the Ancient World to the Present Era*, 3rd ed. (Manchester; New York: Manchester University Press, 2003), 4.

²¹ *Ibid.*, 6

²² The Concise Oxford English Dictionary defines the term ‘influence’ as ‘the capacity to have an effect on the character or behaviour of someone or something, or the effect itself’. This definition provides the meaning of ‘influence’ throughout this document; see also Government of Canada, *Canadian Forces Joint Publication 3-10, Information Operations* (Ottawa, ON: Government of Canada, 2015), 1-3 (footnote).

Even prior to the war mechanisms to censor Canadian newspapers had already been put in place. For example, from 1904 the British controlled censorship in Canada until disagreements with the press in 1914 resulted in a new system of voluntary press censorship starting in 1915.²³ This voluntary system still required the Canadian press to adhere to regulations imposed by the Canadian Government, which were focused on ensuring domestic coverage of the war was skewed optimistically toward Allied victory.²⁴ This example illustrates that as early as 1914 Canadian media were openly voicing their discontent with any form of government censorship.

From the Allied perspective, in 1917 the United States (US) established the Committee on Public Information to coordinate US propaganda efforts and in 1918 Great Britain established the Ministry of Information to pull together the rather disparate propaganda groups that had been operating until that time.²⁵ Both of these organizations were comprised of a mix of government and military personnel, often from the Intelligence community. Domestic propaganda campaigns were referred to as “Home” or “Allied” propaganda, while those same techniques used in support of military objectives against the Axis were referred to as psychological warfare (PSYWAR). When the war reached its conclusion in 1918 the utility of PSYWAR in support of military objectives and Allied propaganda to influence domestic audiences had been clearly demonstrated. As summarized by Bernays, “during World War I, the famous Committee on Public Information ... dramatized in the public’s consciousness the effectiveness of the war of

²³ Mark Bourrie, *The Fog of War: Censorship of Canada's Media in World War Two* (Madeira Park, CA: D & M Publishers, 2011), 21.

²⁴ Bourrie, *The Fog of War: Censorship of Canada's Media in World War Two*, 21

²⁵ Taylor, "Munitions of the Mind: A Brief History of Military Psychological Operations," 198

words.”²⁶ Thus, the trial of ‘modern’ propaganda theory during the First World War was successful.

However, although the use of propaganda was effective from a government and military point of view, its use resulted in a generally negative sentiment amongst Allied media and the public. This negative sentiment, which remains to this day, is indicative of why it became necessary to separate the use of propaganda into military and non-military applications. New terminology would be needed to sever the more sinister aspects of propaganda away from the recognition that information has the power to influence domestic audiences and merited further academic inquiry. Early PR pioneers quickly recognized that the establishment of a new profession would be necessary to continue the scientific advancement of that initial body of propaganda theory while separating such endeavours from government or military involvement.

The concept of public opinion and the birth of public relations

Four years after the conclusion of the First World War Walter Lippman published *Public Opinion*. Lippmann was clearly influenced by his observations of Allied governments and militaries, which he described as “a group of men, who can prevent independent access to the event, arrange the news of it to suit their purpose ... They used their power to make the Allied publics see affairs as they desired them to be seen.”²⁷ Lippmann recognized that Allied governments and militaries had been able to combine propaganda theory and ‘modern’ means of communications to greatly enhance their

²⁶ Edward Bernays, "The Engineering of Consent," *The Annals of the American Academy of Political and Social Science* 250, no. 1 (1947), 115. doi:10.1177/000271624725000116. <https://doi-org.cfc.idm.oclc.org/10.1177/000271624725000116>.

²⁷ Walter Lippmann, *Public Opinion* (New York: Harcourt, Brace and Company, 1922), 42.

ability to influence audiences. His conclusion was that persuasion had become a “self-conscious art and a regular organ of popular government.”²⁸ Thus, much of his work was focused on how democratic societies might be impacted by public sector organizations using newly developed propaganda techniques to influence the publics they were elected to serve.

Lippmann created definitions for public affairs, public opinion, and Public Opinion (capitalized). Public affairs, he suggests, is related to, “those features of the world outside which have to do with the behavior of other human beings, in so far as that behavior crosses ours, is dependent upon us, or is interesting to us.”²⁹ Expanding on this idea further, he suggests that public opinion is comprised of “the pictures inside the heads of these human beings, the pictures of themselves, of others, of their needs, purposes, and relationship.”³⁰ Finally, he considers Public Opinion (capitalized to differentiate between individual thought versus group action) as “those pictures which are acted upon by groups of people, or by individuals acting in the name of groups.”³¹

Lippmann’s work helped to form the theoretical foundation for the establishment of a new profession responsible for managing these factors on behalf of groups, organizations, and governments. Lippmann, who believed that “journalism is not a firsthand report of the raw material. It is a report of that material after it has been stylized,”³² pioneered the idea that the media should not be left to dictate such stylization on their own. Rather, he proposed that a new profession, well versed in political science

²⁸ *Ibid.*, 248

²⁹ *Ibid.*, 29

³⁰ *Ibid.*

³¹ *Ibid.*

³² *Ibid.*, 347

and akin to that of a doctor or lawyer, should be established. Such a profession would be charged with shaping public opinion for the press, instead of relying on the press to report their interpretation of public opinion after it had already been established.³³

Coincidentally, a year after Lippmann published *Public Opinion*, Bernays published *Crystallizing Public Opinion* in 1923 which established much of the PR theory still in use today. Bernays coined the term public relations, defining it as “that field of applied social science which deals with the relations of a unit in our society to the publics upon which that unit depends.”³⁴ Like Lippmann, Bernays advocated for the establishment of a new profession to serve as an intermediary between private industry, public institutions, and the media. Bernays proposed that a PR profession would be necessary “in response to the demand for trained, skilled specialists to advise others on the technique of engineering public consent.”³⁵ Bernays envisioned that the primary focus of PR professionals would be to manage public opinion, which he believed was the cumulative result of a group mind, comprised of individual thinking.³⁶

He reasoned that increases in population and heterogeneity led to diminished commonalities in terms of ancestry, tradition, and culture.³⁷ Thus, organizations seeking engagement with these diverse groups would require experts knowledgeable on how to connect with groups who have dissimilar values, beliefs, attitudes, behaviours, and

³³ *Ibid.*, 32

³⁴ Edward Bernays, "The Engineering of Consent: An Organized Approach to PR Efforts," *NASSP Bulletin* 70, no. 494 (1986), 52. doi:10.1177/019263658607049412. <https://doi-org.cfc.idm.oclc.org/10.1177/019263658607049412>.

³⁵ Bernays, "The Engineering of Consent," 115

³⁶ Edward Bernays, *Crystallizing Public Opinion* (New York: Liveright Publishing Corporation, 1934), 61; see also *Ibid.*, 139

³⁷ Bernays, "The Engineering of Consent," 113; see also Bernays, *Crystallizing Public Opinion*, 126-127

languages. Although Bernays believed that human nature is inherently resistant to change, he theorized that such societal resistances could be overcome by identifying how varying groups are likely to change in response to similar physical and cognitive stimuli. PR research would therefore focus on those areas where different groups share commonalities, and PR campaigns would be engineered to appeal to, and expand on, such commonalities.³⁸ As interested in the practical as the theoretical, Bernays sought to empower future PR professionals with a process he referred to as “the engineering of consent.”³⁹ This process will be explored in greater detail in Chapter Three.

The general concept of organizations having a dedicated PR professional was a novel idea in the 1920’s but early PR professionals quickly proved their worth by applying their knowledge of group psychology and modern communication mediums to help shape public opinion in favour of their clients.⁴⁰ Their success was not without criticism, however, as public memory of the wartime use of propaganda lingered. As recounted by Bernays himself, “to some the public relations counsel is known by the term “propagandist” ... press agent or publicity man. Some dismiss the subject or condemn the entire profession.”⁴¹ This statement once again highlights how the application of propaganda techniques within a domestic context was caught in a dichotomy between the recognition that it merited scientific inquiry and inclusion in a professional vocation, and the negative association it received during the First World War. Bernays, like many other PR professionals, spent a significant portion of his time attempting to draw such distinctions:

³⁸ *Ibid.*, 139

³⁹ Bernays, "The Engineering of Consent: An Organized Approach to PR Efforts," 52

⁴⁰ Bernays, *Crystallizing Public Opinion*, 34-35

⁴¹ *Ibid.*, 12

“The only difference between “propaganda” and “education,” really, is in the point of view. The advocacy of what we believe in is education. The advocacy of what we don’t believe in is propaganda. Each of these nouns carries with it social and moral implications. Education is valuable, commendable, enlightening, instructive. Propaganda is insidious, dishonest, underhand, misleading. It is only to-day that the viewpoint on this question is undergoing a slight change.”⁴²

Both Lippmann and Bernays, among other similarly minded individuals, recognized that if a new PR profession was to become accepted amongst the domestic public, that the public interpretation of the work propaganda would need to change. Thus, efforts were made to replace the most prevalent definition of propaganda at that time, which was a “deliberate attempt to persuade people to think and behave in a desired way.”⁴³ For example, in his 1928 book titled *Propaganda*, Bernays redefines propaganda as the “consistent, enduring effort to create or shape events to influence the relations of the public to an enterprise, idea or group.”⁴⁴ Both definitions capture precisely the same concepts, but Bernays’ uses softer language such as “shape events to influence”, which is more subtle than “deliberate attempt to persuade”, which is confrontational. By 1937 efforts to reshape propaganda toward suggestion and influence were mostly successful as the common definition at that time had become “propaganda is opinion expressed for the purpose of influencing actions of individuals or groups.”⁴⁵

Indicative of the growing public resistance in the 1930’s against the use of propaganda techniques within a domestic context, Edward Filene, a successful businessman, sought to combat the normalization of propaganda use by encouraging the

⁴² *Ibid.*, 212

⁴³ Taylor, *Munitions of the Mind: A History of Propaganda from the Ancient World to the Present Era*, 6

⁴⁴ Edward Bernays, *Propaganda* (United States: Horace Liveright Inc, 1928), 25.

⁴⁵ Elizabeth Briant Lee and Alfred McClung Lee, *The Fine Art of Propaganda: A Study of Father Coughlin's Speeches* (New York: Harcourt Brace, 1939), 15.

public to think critically about the information they consume. His financial backing resulted in the establishment of the Institute for Propaganda Analysis (IPA) in 1937. The aim of the IPA was to encourage the public to think critically before making judgments and to “to throw light on the devices propagandists use in their efforts to swing us to their ways of thinking and acting.”⁴⁶ The IPA actively sought to counter efforts to leverage lexicon gymnastics to make propaganda more palatable to domestic audiences. The IPA did so by altering the newly accepted definition by stating that propaganda is an “expression of opinion or action by individuals or groups deliberately designed to influence opinions or actions of other individuals or groups with reference to predetermined ends.”⁴⁷ The IPA also generated several publications including *The Fine Art of Propaganda*, which introduced the seven basic propaganda devices and the ABCs of Propaganda Analysis, both of which are frequently cited today but are outside of the scope of this paper. Ironically, the institute was shuttered in 1941 after key staff members left to support Second World War efforts, amid increasing financial constraints.⁴⁸

Just as PR professionals were making progress in shifting the public perception of propaganda from direct manipulation and coercion toward suggestion and influence, the volume and efficacy with which propaganda would be employed within the military context throughout the Second World War would serve as a reminder of why the debate had started to begin with.

The impact of the Second World War

⁴⁶ Lee and Lee, *The Fine Art of Propaganda: A Study of Father Coughlin's Speeches*, viii

⁴⁷ *Ibid.*, 15

⁴⁸ Elizabeth Briant Lee and Alfred McClung Lee, "The Fine Art of Propaganda Analysis - then and Now," *Et Cetera* 36, no. 2 (1979) 121-122. <https://search-proquest-com.cfc.idm.oclc.org/docview/1290152053?pq-origsite=summon&accountid=9867&imgSeq=1>.

The Second World War provided an opportunity for militaries to further refine their domestic propaganda and PSYWAR capabilities. What differentiated it from the First World War, however, was that Allied militaries were now able to leverage newly established domestic stakeholders, such as commercial media and PR professionals, to a greater degree than had been previously possible.

As recounted in *The Fog of War* “front-line censors and most of the managers of the system were high-ranking journalists who still had respect for their craft and its ability to act for the public good.”⁴⁹ Journalists working for the commercial media recognized that their coverage of military affairs, such as the departure and arrival dates of warships and merchant ships, could negatively impact Canada’s war efforts. Through the Advisory Committee on Publication of Military Information, journalists worked collaboratively with members of the Wartime Information Board (the Canadian government agency responsible for propaganda) to tactfully censor material.⁵⁰

In terms of overall domestic audience penetration, this collaborative approach was a success. For example, Bernays recorded that the US Office of War Information “broadcast more words over its short-wave facilities during the [Second World] war than were written by all of George Creel’s [Committee of Public Information from the First World War] staff.”⁵¹ The proliferation of new means to exchange information throughout the US following the war led to some describing the US as “the world’s most penetrating and effective apparatus for the transmission of ideas.”⁵² The vision of both Lippmann and

⁴⁹ Bourrie, *The Fog of War: Censorship of Canada's Media in World War Two*, 11

⁵⁰ *Ibid.*, 56

⁵¹ Bernays, "The Engineering of Consent," 115

⁵² *Ibid.*, 113

Bernays, amongst others, to have PR professionals serve as advisors to both private and public organizations was being realized, and they were in high demand.

Modern context

The high demand for communications specialists following the war eventually led to two important changes: the requirement for strategic communications teams and the creation of new specializations within the field of PR.

In *Defining Strategic Communications*, published in 2007, researchers recognized that six communications specialties had become common within large organizations: management communication, marketing communication, public relations, technical communication, political communication, and informational/social marketing campaigns. The interdepartmental coordination of these various communications teams with the goal of maintaining organizational cohesion subsequently became recognized as strategic communications.⁵³ Seeking to provide a broad enough definition to encompass all such communications specialties, the authors defined strategic communications as “the purposeful use of communication by an organization to fulfill its mission.” This interpretation is nearly equivalent to Defence StratCom in DND/CAF.

As shown in the paragraph above, PR was subsumed under the larger strategic communications umbrella, with PR being responsible for “the maintenance of a positive relationship between an employer and the community.”⁵⁴ More importantly, however, was that the PR profession segmented into specializations. PR is now comprised of

⁵³ Kirk Hallahan et al., "Defining Strategic Communication," *International Journal of Strategic Communication* 1, no. 1 (2007), 5-7. doi:10.1080/15531180701285244. <https://www-tandfonline-com.cfc.idm.oclc.org/doi/full/10.1080/15531180701285244>.

⁵⁴ "Careers in Corporate Connection: Strategic Communication Vs. Public Relations," , accessed 2 May, 2021, <https://online.maryville.edu/blog/strategic-communication-vs-public-relations/>.

strategic planning, media relations, community and stakeholder relations, and PA, with PA being focused on the application of PR theory within the public sector.⁵⁵ It is within this context that PAOs are employed in DND/CAF. To summarize, in the private sector strategic communications encompasses PR, which is comprised of several specialties, one of which is PA.

As stated previously, the modern military context has purposefully been omitted from this section as it will be covered in detail in Chapter Five.

Conclusion

The success of wartime propaganda begot both PSYWAR and public relations, with each continuing to evolve rather independently from one another along military and non-military lines. The non-military stream, initially referred to as Allied propaganda, informed the development of early PR theory. After early PR pioneers had established PR as a professional vocation demand for these communications professionals necessitated the establishment of strategic communications teams to synchronize the subordinate communications departments, such as PR. Finally, PR also specialized, with the specialty of most relevance to this paper being PA.

Despite conceptual differences between propaganda, military campaigns, and PR campaigns, three common elements can be found at the core of each that are fundamental to the ideas presented in this paper.

1. Each has an actor, or organization, with an intent to influence another;

⁵⁵ Chartered Institute of Public Relations, *CIPR State of the Profession 2020* (United Kingdom: Chartered Institute of Public Relations,[2020]).
https://cipr.co.uk/CIPR/Our_work/Policy/CIPR_State_of_the_Profession_2019_20.aspx.

2. Each identifies their intended audience and develops a body of knowledge on attitudes or behaviors common amongst that audience; and
3. Each leverage academic knowledge drawn from the applied sciences to craft specific symbols, messages, or products based on knowledge of their audience.⁵⁶

Having established a common history between propaganda and the military and non-military streams that followed, the next chapter will illustrate how their shared history also resulted in each sharing much of the same theory.

⁵⁶ Hal Roberts, Yochai Benkler and Robert Faris, *Network Propaganda: Manipulation, Disinformation, and Radicalization in American Politics* (New York: Oxford University Press, 2018), 26.

CHAPTER THREE - THEORETICAL FOUNDATIONS OF PR AND PA

Leaders may be the spokesmen for many different points of view. They may direct the activities of major organized groups such as industry, labor, or units of government. They may compete with one another in battles for public good will; or they may, representing divisions within the larger units, compete among themselves. Such leaders, with the aid of technicians in the field who have specialized in utilizing the channels of communication, have been able to accomplish purposefully and scientifically what we have termed "the engineering of consent."

- Edward Bernays, *The Engineering of Consent*

Introduction

Chapter Two showed that PA is a specialty within the field of PR, Chapter Three will now seek to provide a detailed outline of what PR is comprised of and how PA is interpreted in DND/CAF. The second section will then introduce several important works from recognized academic contributors to PR planning theory before using those works to synthesize a new model designed to apply to PA, IO, and Defence StratCom activities in DND/CAF. The new model will then be used as an analysis tool in Chapter Four to identify how closely aligned the current DND/CAF PA Strategy is with best practices from PR theory.

PR in the private sector and PA in DND/CAF

Efforts to redefine propaganda to make it palatable domestically were largely unsuccessful, and similar debates arose regarding the definition of PR. In 1977 Rex Harlow, a recognized PR theorist, studied hundreds of existing definitions with the goal of creating one definitive definition. His efforts were not in vain, as his definition remains one of the most cited and widely accepted today. According to Harlow,

“Public relations is a distinctive management function which helps establish and maintain mutual lines of communication, understanding, acceptance and cooperation between an organization and its publics; involves the management of problems or issues; helps management to keep informed on and responsive to public opinion; defines and emphasizes the responsibility of management to serve the public interest; helps management keep abreast of and effectively utilize change, serving

as an early warning system to help anticipate trends; and uses research and sound and ethical communication as its principal tools.”⁵⁷

Acknowledging both the length, and age, of Harlow’s definition, a more modern definition from the Public Relations Society of America (PRSA) will also be presented. The PRSA define PR as “a strategic communication process that builds mutually beneficial relationships between organizations and their publics.”⁵⁸ The PRSA also notes that PR includes “influencing, engaging and building a relationship with key stakeholders across numerous platforms in order to shape and frame the public perception of an organization.”⁵⁹

In terms of PA in DND/CAF, the CDS/DM planning guidance provides several new definitions and descriptions that have not yet been incorporated into Termium, the official terminology and linguistics data bank for the Canadian government. The CDS/DM planning guidance states that PA in DND/CAF:

“encompasses activities related to informing internal and external audiences. It is the function of communicating with Canadians, allies, and in-theatre audiences in a way that directly contributes to enhancing the understanding and trust among citizens and other key groups...[PA] includes research and environmental analysis, communications advice and planning, and the delivery of information programs.”⁶⁰

Comparing the DND/CAF definition with the others above, they are nearly synonymous, showing that the PA function in DND/CAF is equivalent to that of PR in the private sector.

⁵⁷ Rex F. Harlow, "Public Relations Definitions through the Years," *Public Relations Review* 3, no. 1 (1977) 36. doi:[https://doi.org/10.1016/S0363-8111\(77\)80018-0](https://doi.org/10.1016/S0363-8111(77)80018-0).
<https://www.sciencedirect.com/science/article/pii/S0363811177800180>.

⁵⁸ "About Public Relations," accessed 2 May, 2021, <https://www.prsa.org/about/all-about-pr#:~:text=A%20more%20modern%20definition%20of,between%20organizations%20and%20their%20publics.%E2%80%9D&text=Protecting%20the%20reputation%20of%20an%20organization.>

⁵⁹ *Ibid.*

⁶⁰ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 10-11

Understanding that PR in private industry is equivalent to PA in DND/CAF is important because it speaks to the level of knowledge and expertise of PAOs employed in DND/CAF. Recall that other PR specialities include strategic planning, media relations, community relations, and stakeholder relations. In DND/CAF, PAOs are involved in all of these sub disciplines, effectively making them a swiss army knife of PR skillsets. The robust skillset of PAOs and their practical application of that skillset within a military context is one of the key reasons why PAOs are uniquely qualified to assume greater roles in IO and Defence StratCom.

PR planning theory

The core purpose of PR is to communicate with a specific audience with an intent to persuade them toward (or away from) a specific attitude or behaviour. Lippman referred to this concept as the “manufacture of consent,”⁶¹ while Bernays referred to it as the “engineering of consent.”⁶² Bernays believed if the public believed in the soundness of an idea, that idea would then naturally proceed to action, regardless of whether that idea was fundamentally ideological, political, or social.⁶³ As will be demonstrated, modern language has broadly repackaged and rebranded Lippmann’s concept of manufacturing and Bernays’ concept of engineering consent as PR campaign planning. While there may be variances in the specific model used, many strategic communications plans are also developed using these same principles. For example, both begin with the identification of a problem that is of importance to an organization, based on practical research drawn from a relevant audience. Communications experts then work with the

⁶¹ Lippmann, *Public Opinion*, 248-249

⁶² Bernays, "The Engineering of Consent," 113-120

⁶³ *Ibid.*, 120

organization to generate a strategic communications strategy by clearly identifying organizational objectives and goals which are then used to develop a plan, or series of plans, to address the original issue.⁶⁴ A more detailed example will be provided next.

The following section draws inspiration from several notable PR experts and their works containing PR planning principles and best practices in order to develop a new planning model that could be applied to PA, IO, and Defence StratCom in DND/CAF. A brief introduction of each author and source material will be presented chronologically in the text below, noting that the most relevant details from their work will be presented in a table immediately following.

The first set of planning principles are from Bernays' book *Crystalizing Public Opinion*, written in 1923.⁶⁵ Bernays provided four principles in his 1947 essay titled *The Engineering of Consent*, which was later integrated into a book of the same name in 1955.⁶⁶ In 1963 John Marston introduced the RACE model, which stands for Research, Action, Communication, and Evaluation, in *The Nature of Public Relations*.⁶⁷ This model was subsequently republished in the 1979 release of *Modern Public Communications*, which is the source used in this paper.⁶⁸ *Public Relations in Action*, written by PR theorist Robert Reilly and published in 1981, outlined an eleven-step process⁶⁹ together with six planning elements.⁷⁰ In 1986 Bernays published another eight step process in *The*

⁶⁴ Carl Botan, "Ethics in Strategic Communication Campaigns: The Case for a New Approach to Public Relations," *The Journal of Business Communication* 34, no. 2 (1997), 188. doi:10.1177/002194369703400205. <https://journals-sagepub-com.cfc.idm.oclc.org/doi/abs/10.1177/002194369703400205>.

⁶⁵ Bernays, *Crystalizing Public Opinion*, 166-167

⁶⁶ Bernays, "The Engineering of Consent," 116

⁶⁷ John E. Marston, *Modern Public Relations* (New York: McGraw-Hill, 1979), 186-194.

⁶⁸ Marston, *Modern Public Relations*, 186-194

⁶⁹ Robert T. Reilly, *Public Relations in Action* (Englewood Cliffs, N.J: Prentice-Hall, 1981), 70.

⁷⁰ Reilly, *Public Relations in Action*, 76

Engineering of Consent: An Organized Approach to PR Efforts.⁷¹ In 1989 Ronald Pearson, a PR theorist, proposed another four-step model in *A Theory of Public Relations*.⁷² Finally, the most recent models have been sourced from SAGE Publishing's 2009 book, *Key Concepts in Public Relations*,⁷³ and Anne Gregory's 12 step process⁷⁴ outlined in *Planning and Managing Public Relations Campaigns: A Strategic Approach*, published in 2010.

Using the source material described above I synthesized a new model intended to apply to PA, IO, and Defence StratCom in DND/CAF. The table below was developed by first identifying common themes from the source material. Those common themes are presented in the leftmost column. Next, each source was placed chronologically at the top of each column to the right of the common themes. The models or list of principles specific to each source were separated into individual components, with each component then being aligned to its corresponding theme. The rightmost column is the final product which is then presented after the table in graphical format with a detailed text description of each step.

⁷¹ Bernays, "The Engineering of Consent: An Organized Approach to PR Efforts," 52-54

⁷² Ronald Albert Pearson, "A Theory of Public Relations Ethics" Ohio University, 1989), 12-19. <https://search-proquest-com.cfc.idm.oclc.org/docview/303733037?pq-origsite=summon>.

⁷³ Bob Franklin et al., *Public Relations Planning, in Key Concepts in Public Relations* (London, England: SAGE Publications Ltd, 2009), 182-183. doi:<https://www-doi-org.cfc.idm.oclc.org/10.4135/9781446269084>.

⁷⁴ A. Gregory, *Planning and Managing Public Relations Campaigns: A Strategic Approach*, Third ed. (London, England: Kogan Page, 2010), 41. http://staffnew.uny.ac.id/upload/198606242015042003/pendidikan/gregory_planning_and_managing_campaigns.pdf.

Planning model development for PA, IO and Defence StratCom in DND/CAF										
Common themes	(1923) Bernays, <i>Crystalizing Public Opinion</i>	(1947) Bernays, <i>Engineering of Consent</i>	(1979) Marston, <i>A theory of public relations</i>	(1981) Reilly, <i>Eleven steps, Public Relations in Action</i>	(1981) Reilly, <i>Six elements, Public Relations in Action</i>	(1986) Bernays, <i>Engineering of Consent: An Organized Approach to PR Efforts</i>	(1989) Pearson, <i>A Theory of Public Relations</i>	(2009) Sage Books, <i>Key Concepts in Public Relations.</i>	(2010) Gregory, <i>Planning and Managing Public Relations Campaigns.</i>	(2021) Heckman
PR expertise										1. Use PR professionals
Research and analysis		As thorough knowledge of the subject as possible	Research	- Gathering and analysis of data - Examination of past experience and the experience of others - Consideration of future developments		Research your publics	Environmental Analysis and Problem Definition		Analysis	2. Develop Knowledge
Problem definition	Analyze the client's problem			Identification of problem or opportunity	Reason for the plan		Environmental Analysis and Problem Definition	Aims	Aims	3. Identify aim, objectives, goals, and expected outcomes
Objectives, goals	Analyze the client's objective	Determination s of objectives, subject to change after research			Goals or objectives of the plan Current status of the organization vis-a-vis these objectives	Determine your goal	Determination of goal, objectives, and strategies	Objectives	Objectives	
Internal resources		Calculation of resources, both human and physical;				Establish your organization				4. Identify internal resource requirements; build teams based on resource allocation

Key stakeholders and Intended Audiences	Analyze the public he is trying to reach				Target audiences			Definition of target audiences	Stakeholders and publics	5. Identify key stakeholders and intended audience
Detailed research	Estimate the interaction between the intended audience and client	Research of the public to learn why and how it acts, both individually and as a group				Modify your goals if necessary		Research		6. Conduct detailed research based on draft plan(s) and audience(s)
Generate an overall strategy (if required), detailed plan(s)	Devise a plan for the client and determine methods of distribution available for reaching the intended audience		Action	Evaluate alternatives and select best	Method of implementation to be used	Plan your strategy Identify themes and appeals Determine timing and plan tactics		Definition of messages Methods	Content Strategy Tactics Timescales	7. Develop plan(s), ensuring strategic alignment
Overall Resources					Cost	Create a budget			Resources	8. Identify overall campaign resource requirements
Plan implementation			Communication	Implementation of plan			Implement communication programs and strategies	Implementation		9. Select and implement plan
Monitor and Evaluate Results			Evaluation	Monitoring of plan			Evaluation of the effects	Evaluation	Monitoring Evaluation Review	10. Monitor, evaluate, review

Table 3.1: Planning model development for PA, IO and Defence StratCom in DND/CAF

The column on the right of Table 3.1 contains the newly developed model which has been represented graphically below to demonstrate the intent for the model to form a cyclical process.

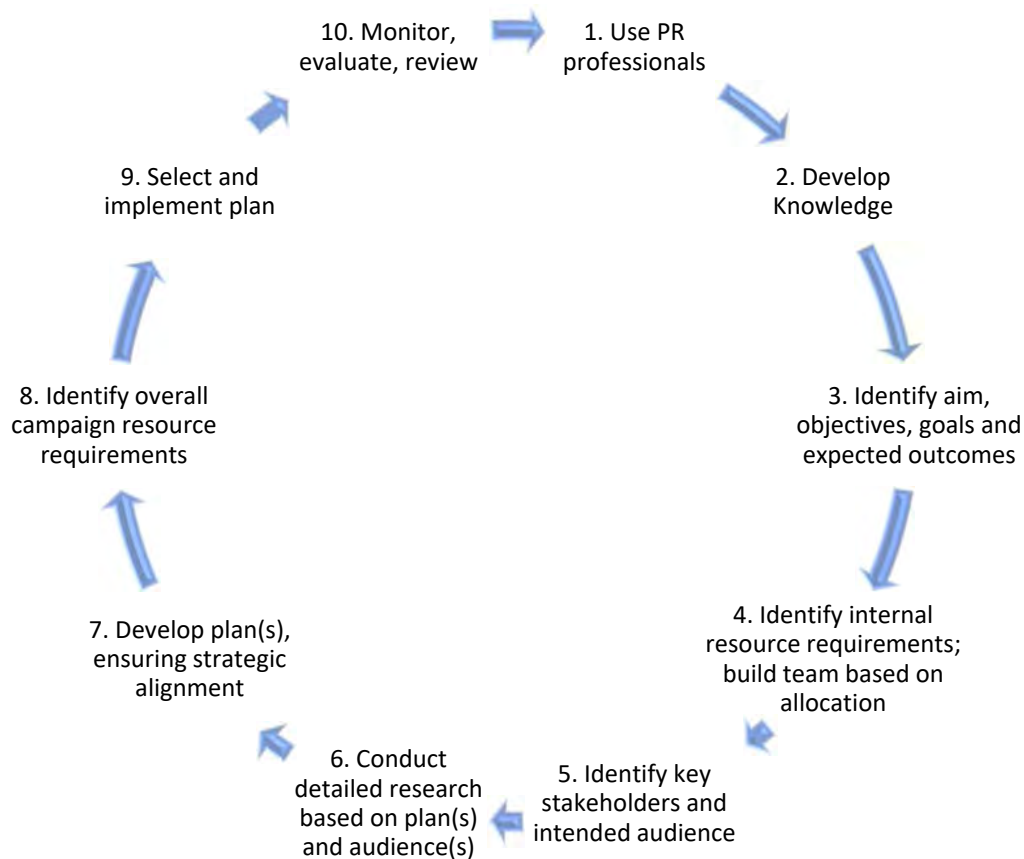


Figure 3.1: Proposed planning model in support of PA, IO and Defence StratCom

Step 1 - Use PR professionals: Ensure PAOs are provided the required training and education or leverage external PR professionals. As indicated in Chapter One ADM(PA), not the CAF, is responsible for the generation and employment of PAOs. This creates a potential point of friction in terms of IO and Defence StratCom, both of which are led by the CAF. This topic will be considered in greater detail in Chapter Seven.

Step 2 - Develop Knowledge: As part of their PA function, PAOs develop a body of knowledge based on past experiences and using internal and external research

methods. As noted by Bernays, “the public relations counsel employs all those practical means of gauging the public mind which modern advertising has developed and uses.”⁷⁵ DND/CAF could conduct its own research internally, through generalized or targeted research campaigns, surveys, polls, and focus groups, for example. Alternatively, the private sector has recognized that providing insight into public opinion is profitable. Thus, it is equally viable for DND/CAF to “buy” knowledge from companies specialized in this area. Having acquired a body of knowledge either internally or through external sources, that research data is not only useful to PA, but IO and Defence StratCom as well.

Step 3 - Identify aim, objectives, goals and expected outcomes: Within the DND/CAF context this step should consider the overall mission and Command intent when establishing initial frameworks. This step includes the identification of primary and secondary objectives, as well as goals and expected outcomes. These factors are already embedded within existing CAF operational planning process (OPP), which recognizes that the psychological dimension should be considered in addition to the physical.⁷⁶ PAOs are less likely to have practical experience with the OPP than warfare officers, however, which may make planning military operations, vice PA activities, more difficult. That said, PAOs are introduced to the OPP during the Joint Command and Staff Programme (JCSP); this paper contends that teaching OPP to PAOs is a better option than teaching warfare officers how to plan operations in the IE. Therefore, while adoption of the proposal in this paper would introduce training gaps, addressing those challenges would, arguably, be a better option than maintaining the status quo.

⁷⁵ Bernays, *Crystallizing Public Opinion*, 54

⁷⁶ Government of Canada, *Canadian Forces Joint Publication (CFJP) 5.0: The Canadian Forces Operational Planning Process* (Ottawa, ON: Government of Canada, 2008), 2-1.

Step 4 - **Identify internal resource requirements; build teams based on resource allocation:** Identify required resources by considering team size and composition, internal or externally contracted services, budget, and the time required to generate a plan. While all CAF leaders are responsible for the effective stewardship of resources, many rely on logistics officers to assist in this regard. PAOs, by contrast, are often required to identify and manage their own budgets and resources and often coordinate directly with outside agencies. These examples speak to the unique skillset and utility of PAOs, given that resource and team management are equally applicable to PA, IO, and Defence StratCom.

Step 5 - **Identify key stakeholders and intended audience:** Based on existing PR knowledge, stated objectives, and expected outcomes, specific stakeholders and audience(s) should be identified to focus PR efforts. PR professionals, such as PAOs, specialize in using research data and personal experience to identify similarities and interconnectedness within and between such groups.⁷⁷ PAOs are then able to leverage these similarities to develop a PA campaign plan that focuses on specific narratives and themes that are common amongst their key stakeholders and intended audience(s). It should be noted that existing PAO training already includes stakeholder engagement and audience analysis, and that both stakeholder identification and audience analysis are also key aspects of IO and Defence StratCom.⁷⁸

⁷⁷ Bernays, *Crystallizing Public Opinion*, 139-147

⁷⁸ Government of Canada, *Training Plan: Basic Public Affairs Officer Course (BPAOC)* (Ottawa, ON: Government of Canada, 2019), 12-16.

Step 6 - Conduct detailed research based on draft plan(s) and audience(s): To enable the development of a cohesive plan, a detailed assessment of the IE is required to ensure new narratives and themes are intentionally designed to either enhance or diminish, as applicable, any narratives and themes that may already be in place.⁷⁹ Such an assessment can be accomplished using similar research methods as were used in the more broadly focused research conducted in Step 2, but in Step 6 any research conducted should focus specifically on the stakeholders and audience(s) identified in Step 5.

Step 7 - Develop plan(s), ensuring strategic alignment: Review existing strategic guidance to ensure the detailed plan incorporates that higher guidance. Ideally, the organization's strategic communications team, which is currently SJS in DND/CAF, will have already developed strategic narratives and themes. If no such guidance exists, however, the team should develop strategic narratives and themes that are, as a minimum, aligned with the organizational mission, vision, and values. It is important to note that while strategic intent should inform operational plans, the latter must be certain to integrate the research results from the stakeholder and audience analysis in Step 6 to ensure the plan is of relevance to that specific audience.⁸⁰

Specific to PA, IO, and Defence StratCom planning it is recommended that DND/CAF adopt a 'storied' approach by developing an overarching strategic narrative then segmenting it into many smaller stories, each of which support the overall narrative.⁸¹ Acknowledging that audiences most often receive information from different sources, some of which may lack accuracy, it is recommended that strategic narratives

⁷⁹ Thomas Elkjer Nissen, "Strategizing NATO's Narratives," in *Strategy in NATO* (New York: Palgrave Macmillan US, 2014), 161.

⁸⁰ *Ibid.*

⁸¹ *Ibid.*, 158

focus on futures that are “based on the present situation and informed by the past, taking the audience’s current views and expectations into account, rather than focusing on the differences between the competing narratives.”⁸² The process of developing an effective plan begins with an analysis of the intended audience to include their values, existing beliefs, and expectations of their intentions and actions.

In terms of methods and tactics, the following three recommendations have been summarized and presented for DND/CAF to consider in support of PA, IO, and Defence StratCom. First, people are more inclined to accept new information when provided to them through means with which they are already familiar.⁸³ Thus, any plan should leverage those communications channels most likely to be used by their intended audience, as should have been identified during detailed research analysis.⁸⁴ Second, a strong narrative should be developed, prioritizing the visual over text or audio wherever practicable.⁸⁵ Third, plans should seek to connect with human emotion based on the desired effect.⁸⁶ Bernays recommends planners consider the seven primary human instincts proposed by psychologist William MacDougall: flight-fear; repulsion-disgust; curiosity-wonder; pugnacity-anger; self-display-elation; self-abasement-subjection; and parental-love-tenderness.

⁸² *Ibid.*, 159

⁸³ Bernays, *Crystallizing Public Opinion*, 125-138

⁸⁴ *Ibid.*

⁸⁵ Claire Wardle and Hossein Derakhshan, *Information Disorder: Toward an Interdisciplinary Framework for Research and Policy Making* (Europe: Council of Europe,[2017]).
https://www.researchgate.net/profile/Hossein_Derakhshan2/publication/339031969_INFORMATION_DISORDER_Toward_an_interdisciplinary_framework_for_research_and_policy_making/links/5e39d0c3a6fdccd96587e24e/INFORMATION-DISORDER-Toward-an-interdisciplinary-framework-for-research-and-policy-making-Information-Disorder-Toward-an-interdisciplinary-framework-for-research-and-policy-making.pdf

⁸⁶ *Ibid.*

Step 8 - **Identify overall campaign resource requirements:** This step recommends that DND/CAF consider not only the fiscal resource requirements, but other elements such as human, materiel, temporal (length of activity or operation), and knowledge or expertise. A comprehensive assessment of resource requirements will assist in managing expectations and descoping if inadequate resources are allocated. This is particularly relevant for DND/CAF, where resource allocation may not always match ambition and is as applicable to IO and Defence StratCom as it is to PA. Familiarity with the planning and execution of PR activities is of clear importance to ensure this step is successful, with PAOs again being the ideally positioned to execute this step effectively.⁸⁷

Step 9 - **Select and implement plan:** Based on the best balance of factors, such as which plan is most likely to achieve the objectives based on the resources allocated, a plan is then selected and implemented. This step can therefore be directly compared to OPP course of action development and analysis and it is recommended that the OPP be used in support of this step.

Step 10 - **Monitor, evaluate, review:** As the plan moves from planning to execution, its implementation and associated outcomes should be monitored, evaluated, reviewed, with lessons feeding back into a generalized body of knowledge like the CAF Knowledge Management System, for example. Within DND/CAF there are many methods of evaluation and review such as Measures of Performance, Measures of Effectiveness, and the Lessons Learned process. These methods should also be applied to PA, IO, and Defence StratCom, noting that it can be difficult to employ such methods in the IE because thoughts, values and attitudes are cognitive, making them difficult to assess.

⁸⁷ Government of Canada, *Training Plan: Basic Public Affairs Officer Course (BPAOC)*, 53-56

While evaluators could try to convince a target audience to share how a DND/CAF PA, IO, or Defence StratCom activity affected them, it is recommended that an indirect approach be used instead. This can be accomplished by qualitatively assessing changes in intended audience behaviour, though even this approach can be difficult as establishing correlation between an activity and changes in audience behaviour can also be attributed to any number of other reasons unrelated to the DND/CAF activity.

Conclusion

Despite PA being public sector focused while PR is private sector focused, both share much of the same foundational theory. This chapter began by showing that PA and PAOs in DND/CAF are equivalent to PR and PR professionals in the private sector. Having explained why PR theory applies to PA in DND/CAF, a new planning model was developed based on nearly a century of PR theory and designed to apply to PA, IO, and Defence StratCom in DND/CAF. Next, the newly developed model will be used as a tool to analyze the *DND and CAF Public Affairs Strategy 2018-2020*, which remains extant even after the ADM(PA) reset of PAO involvement in CAF IO activities.⁸⁸

⁸⁸ Government of Canada, *DND and CAF Public Affairs Strategy 2018-2020* (Ottawa, ON: Government of Canada, 2018).

CHAPTER FOUR - ANALYSIS OF THE DND AND CAF PA STRATEGY

Strategy is a concept for linking means to ends. Policy defines the end state, while strategy outlines the plan. Strategy therefore links policy to specific activities ... the concept that links available national resources to government ends - over time, and as circumstances change. For the Department and the Forces, strategy is about how to use our resources to best support the government's aims.

- Government of Canada, *Canadian Force Joint Publication 5.0: CF OPP*

Introduction

This chapter will use the newly developed model to analyze the *DND and CAF Public Affairs Strategy 2018-2020*. This strategy was selected for analysis due to two reasons. First, as strategies are more focused on organizational objectives and abstracted from specific details, the DND/CAF PA Strategy provides an ideal example to assess using the newly developed model, which is also intended to be used at an operational or strategic level. Second, an analysis of the DND/CAF PA Strategy will help to demonstrate that PAOs, who are responsible for the implementation of the strategy, could apply that same expertise to IO and Defence StratCom, if given the opportunity.

DND and CAF Public Affairs Strategy 2018-2020

The analysis was conducted by listing each step of the model then using examples from the strategy to demonstrate that DND/CAF, and more specifically PAOs, are well versed in the practical application of each of these steps. For the remainder of this paper the *DND and CAF Public Affairs Strategy 2018-2020* will be referred to as the "PA Strategy," for brevity. Finally, given that this PA Strategy is an internal DND/CAF document, specific details have been omitted based on a recognition that a high degree of fidelity was not required for this analysis to be conducted. For those with access to DND/CAF systems, the complete document is easily accessible through the ADM(PA) homepage on the Defence Wide Area Network.

Step 1 - **Use PR professionals:** The PA Strategy notes that DND/CAF employ PA practitioners, an inclusive term to represent both civilian and military PA personnel (PAOs). It should be noted that all PAO's attend the Basic Public Affairs Officer Course (BPAOC) shortly after joining the CAF. This ensures all PAOs have the same core PA knowledge prior to them being distributed throughout DND/CAF. The provision of standardized knowledge through BPAOC and subsequent employment of PAOs in the CAF is relevant for two reasons.

The first is that civilian PR practitioners typically join DND with a high degree of pre-existing knowledge but are not required to attend BPAOC. This means civilian members working in DND may have with little to no knowledge of the CAF or how it conducts operations. This is the primary reason this paper recommends that PAOs, vice civilian PA practitioners, be considered for leadership positions in CAF IO and Defence StratCom. The combination of theoretical knowledge and practical experience working in the CAF means PAOs gain a unique skillset that makes them uniquely qualified to lead CAF operations in the IE.

The second reason is that after BPAOC there are no advanced PA, IO, or Defence StratCom courses as part of PAO occupational training. A single trade course is uncommon in the CAF. Most trades employ a tiered training approach, with multiple trade-specific courses being provided as members increase in rank and/or responsibility. Thus, PAOs seeking professional development opportunities in these areas must leverage on the job training, post graduate coursing, or specialized training opportunities with Allies or NATO. This is important because if PAOs were to assume positions of

leadership in IO and Defence StratCom as is proposed in this this paper, it is recognized that a training gap currently exists, and it would need to be addressed.

Step 2 - Develop Knowledge: The PA Strategy confirms that PAOs can conduct research using a public opinion research (POR) process. POR is “The planned, one-way systematic collection, by or for the Government of Canada, of opinion-based information of any target audience using quantitative or qualitative methods and techniques such as surveys or focus groups.”⁸⁹ ADM(PA), has clearly leveraged POR in the development and implementation of the PA Strategy, as will be shown later in this section. While it is recognized that a domestic POR process would apply more to Defence StratCom than to IO, one could logically conclude that PAO familiarity with a domestic POR process would be beneficial to research in support of IO operations outside of Canada.

Step 3 - Identify aim, objectives, goals and expected outcomes: The aim of the PA Strategy is to provide “high-level guidance to PA practitioners on communicating Defence objectives.”⁹⁰ It provides a comprehensive text description of expected outcomes and objectives, and *Annex B, the PA Strategy 2018-2020 Logic Model*, graphically represents how each strategic, ultimate, and intermediate outcome, as well as strategic PA objectives and outputs, all align and are mutually supportive of one another.⁹¹ This shows approach establishes clear linkages from the tactical through national strategic levels, with the establishment of such linkages being applicable to IO and Defence StratCom as well.

⁸⁹ "DAOD 2008-9, Public Opinion Research," last modified 25 January, 2019, accessed 2 May, 2021, <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/defence-administrative-orders-directives/2000-series/2008/2008-9-public-opinion-research.html>.

⁹⁰ Government of Canada, *DND and CAF Public Affairs Strategy 2018-2020*, 3

⁹¹ *Ibid.*, Annex B

Step 4 - Identify internal resource requirements; build teams based on resource allocation: The PA Strategy indicates that ADM(PA) is responsible for resource allocation for approved PA activities and for the conduct of research and analysis, advice and planning, PA training, and CAF outreach.⁹² It does not, however, contain any financial information regarding how resources are assigned and where they are allocated, as such figures are likely contained in the ADM(PA) business plan. It is logical to assume, however, that ADM(PA) has allocated resources toward the development and implementation of the PA Strategy. In terms of alignment between these resources and development of teams, the PA Strategy notes that ADM(PA) maintains a standing Public Affairs Coordination and Planning (PACP) team who are available to assist subordinate PA teams in their planning efforts. Given that coordination and planning are as equally applicable to PA as IO and Defence StratCom, the establishment of a team familiar with coordinating and planning activities in the IE could benefit the CAF as well.

Step 5 - Identify key stakeholders and intended audience: The PA Strategy contains a comprehensive audience pool, a list of criteria used to designate audience groups and associate groups with specific objectives, and provides PA practitioners guidance on communication focus areas to incorporate into their campaign planning. Additionally, a supporting document to the PA Strategy, *Stakeholder Engagement: A National Strategic Plan 2017-2020*, clearly identifies which groups and organizations ADM(PA) considers key stakeholders in terms of PA, while offering guidance on how

⁹² "DAOD 2008-0, Public Affairs Policy," last modified 30 January, 1998, accessed 2 May, 2021, <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/defence-administrative-orders-directives/2000-series/2008/2008-0-public-affairs-policy.html>.

these stakeholders should be engaged in support of DND/CAF strategic objectives.⁹³

Thus, given that stakeholder and target audience analysis is also required to support IO and Defence StratCom, the CAF would clearly benefit from PAO experience in these areas.

Step 6 - Conduct detailed research based on draft plan(s) and audience: The PA Strategy directly incorporates the results from various POR studies to inform many of its strategic PA objectives, and the results of POR research studies have been used to identify specific performance targets. For example, *Annex A: Audience Personas and Key Messages*, provides examples of personas for each audience group based on POR results. The PA Strategy then describes how PAOs can use these personas to develop targeted messages and content for their audience(s).⁹⁴ Again, this step is equally applicable to PA, IO, and Defence StratCom.

Step 7 - Develop plan(s), ensuring strategic alignment: ADM(PA) issue a strategic PA plan to issue direction and guidance for all PA programs and activities throughout the year. The plan provides PAOs with DND/CAF PA objectives, priorities, goals, and corporate themes, while also outlining the major activities they will be involved with throughout the year.⁹⁵ In support of strategic plan implementation, PAOs are responsible for the development of subordinate PA plans that “articulate the public affairs objectives, themes, approaches and activities required to support the implementation of a policy, program, operation or initiative, and/or to manage an issue or

⁹³ Government of Canada, *Stakeholder Engagement: A National Strategic Plan 2017-2020* (Ottawa, ON: Government of Canada, 2018).

⁹⁴ Government of Canada, *DND and CAF Public Affairs Strategy 2018-2020*, 13-16

⁹⁵ "DAOD 2008-0, Public Affairs Policy."

crisis.”⁹⁶ This illustrates how PAOs gain unique experience by practically applying their PR knowledge while planning and conducting activities in support of DND/CAF objectives. This skillset sets PAOs apart from all other trades employed in the CAF.

In terms of strategic alignment, the PA Strategy is aligned with the Government of Canada expectations as articulated in *Strong, Secure Engaged: Canada’s Defence Policy (SSE)*. It provides DND/CAF with guidance on the overall ‘Defence Narrative,’ which broadly consists of defence and security, Canadian values, and SSE. More specifically, the Defence Narrative supports three themes: Personnel and their Families, Capability and Capacity, and Achieving Operational Success – Anticipate, Adapt, Act.⁹⁷ The PA Strategy itself, and its supporting Annexes, represent ADM(PA)’s overall PA plan for DND/CAF. Additionally, the PA Strategy directs that all other DND and CAF organizations, environments and commands are to align with the PA Strategy.⁹⁸ The ability to develop comprehensive plans that apply to multiple organizations while ensuring that such plans are aligned with Government of Canada strategic are skills that are directly relevant to PA, IO and Defence StratCom.

Step 8 - Identify overall campaign resource requirements: The PA Strategy contains no indication of specific resources or resource allocation. That said, for the same reasons described under the heading “identify internal resource requirements”, it should be assumed that ADM(PA) has apportioned a section of its budget toward the implementation of the PA Strategy.

⁹⁶ *Ibid.*

⁹⁷ Government of Canada, *DND and CAF Public Affairs Strategy 2018-2020*, 3-5

⁹⁸ *Ibid.*, 12

Step 9 - **Select and implement plan**: The step is less applicable in this context, as the PA Strategy itself represents the plan that DND/CAF selected. The PA Strategy does, however, contain an implementation section that provides subordinate PAO planners with overarching guidance on how they should develop and implement their own plans to support the overall PA Strategy.⁹⁹

Step 10 - **Monitor, evaluate, review**: The PA Strategy contains a detailed list of performance indicators and performance targets specific to each strategic PA objective. These are visualized on the reverse side of *Annex B, the PA Strategy 2018-2020 Logic Model*.¹⁰⁰ What is noteworthy about these performance indicators and targets is that they are nearly all based on the results surveys and tracking studies such as the *Views on the Canadian Armed Forces 2016 Tracking Study*, which was conducted by a contracted POR service.¹⁰¹ This approach has enabled ADM(PA) to set more realistic performance targets as they are all based on real-world data. One example of this is a performance target under the strategic PA objective of “Increase awareness of how and why the CAF serves Canada”, which has a performance target of “Increase familiarity with CAF from 51% to 52%.”¹⁰² In terms of review, the PA Strategy states that the “Public Affairs Coordination and Planning will prepare a report on an annual basis providing a snapshot on the established indicators and targets.”¹⁰³ Once again, the practical experience of PAOs in monitoring, evaluating and reviewing PA activities would be of direct benefit IO and Defence StratCom.

⁹⁹ *Ibid.*

¹⁰⁰ *Ibid.*, Annex B

¹⁰¹ SPI Phoenix, *Views on the Canadian Armed Forces 2016 Tracking Study* (Ottawa, ON: Government of Canada,[2016]).

¹⁰² Government of Canada, *DND and CAF Public Affairs Strategy 2018-2020*, 9

¹⁰³ *Ibid.*, 12

Conclusion

This chapter used the newly developed model as a tool to analyze the *DND and CAF Public Affair Strategy 2018-2020*. Overall, the analysis found that ADM(PA), and PAOs, have a surprising level of maturity and cohesion in all areas of the model. Not only does the PA Strategy clearly adhere to best practices from PR theory, but it also shows how PAOs have been provided with the necessary processes and mechanisms, such as POR, to assist with its implementation. This speaks to the fact that ADM(PA) has significant experience operating in the IE, with PAOs being well versed-in PR theory and its practical application within a governmental context. Thus, PAOs, being responsible for the implementation of that strategy, are the DND/CAF equivalent of PR professionals in the private sector. This point is important because in private industry the skillset of PR professionals enable them to coordinate PR campaigns and lead strategic communications within their respective organizations. This paper posits that this same PR skillset, embodied by PAOs, is required to coordinate IO activities and lead Defence StratCom in the CAF.

Chapters Five through Seven will now focus on providing the overall DND/CAF context before explaining how criticism from the Canadian media and internal DND/CAF challenges have restricted PAOs from being employed in the same way as their PR counterparts in the private sector.

CHAPTER FIVE – THE EVOLUTION OF PA, IO, AND DEFENCE STRATCOM IN DND/CAF

Introduction

This chapter shifts focus inward and provides the context required to better understand the proposition of this paper from sources internal to DND/CAF. It will begin with a DND/CAF PA policy review to provide insight into what DND perceives the role of PA to be. Following the policy review, the chapter will describe how prior to the reset the CAF had been seeking to expand the role of PAOs and have them more engaged in CAF operations. From a sequencing perspective, this chapter will conclude in early 2020, as the focal point of Chapter Six will be the events that occurred in 2020 which led to ADM(PA) ceasing all PA involvement in CAF influence activities and IO. Before moving forward, the reader should have a broad understanding of the term “functional authority” and how the DM and CDS use this term to assign responsibilities to specific DND and CAF organizations. Functional authority is described as:

“Authority assigned in a policy framework [DAOD] by the Deputy Minister of National Defence and the Chief of the Defence Staff to a level one advisor or other senior official to develop and issue DAOD, manuals, standard operating procedures and other similar instruments in an assigned or authorized functional area.”¹⁰⁴

In other words, the DM and CDS assign subordinate organizations functional authority (responsibility) over specific functional areas, which enable those organizations to use issue direction to DND/CAF members through policy, such as DAODs.¹⁰⁵

¹⁰⁴ "Definition of "Functional Authority" from Termium, Record 1," Government of Canada, last modified 12 September, 2019, accessed 2 May, 2021, https://www.btb.termiumplus.gc.ca/tpv2alpha/alpha-eng.html?lang=eng&i=1&srchtxt=functional+authority&codom2nd_wet=1#resultrees.

¹⁰⁵ "DAOD 1000-0, Foundation Framework for Defence Administrative Orders and Directives," Government of Canada, last modified 20 January, 2017, accessed 2 May, 2021, <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/defence->

Overview of existing PA authorities and responsibilities

Based on the CDS/DM planning guidance, PA is “the sole information capability used to communicate domestically on defence matters.”¹⁰⁶ The aspect of PA policy that is of most relevance to this paper are authorities and responsibilities, as they impact how PAOs are employed. The DM and CDS have assigned functional authority of PA to ADM(PA).¹⁰⁷ As functional authority, ADM(PA) is responsible for:

1. Media relations and public announcements;
2. Issue management and crisis communications;
3. Marketing, advertising and visual identity;
4. Public affairs training;
5. Electronic and print publishing of communications products;
6. Public opinion research; and
7. Corporate internal communications.¹⁰⁸

ADM(PA) then provides direction to DND/CAF using Defence Administrative Orders and Directives (DAOD), specifically the DOAD 2008 series, “Public Affairs Policy.”¹⁰⁹ Of the ten policies in the 2008 series it is notable that eight have an effective date of 1 March 1998, with none being updated since, aside from a single entry made in 2003. The two exceptions are DAOD 2008-8, *Official use of Social Media* (issued in 2018), and 2008-9, *Public Opinion Research* (issued in 2019). Thus, PA policy in

[administrative-orders-directives/1000-series/1000/1000-0-foundation-framework-defence-administrative-orders-directives.html#int](https://www.defence.gc.ca/defence-administrative-orders-directives/1000-series/1000/1000-0-foundation-framework-defence-administrative-orders-directives.html#int).

¹⁰⁶ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 11

¹⁰⁷ "DAOD 1000-10, Policy Framework for Corporate Administration Management,"

¹⁰⁸ *Ibid.*

¹⁰⁹ "DAOD 2008-0, Public Affairs Policy."

DND/CAF has remained largely unchanged since first being promulgated in 1998. Despite their age, each of these DOADs support individual arguments that have been made throughout this paper to demonstrate that the approach to PA in DND/CAF is founded on well-established PR theory. For example, DAOD 2008-5, *Public Affairs Planning Program*, illustrates a comprehensive planning approach,¹¹⁰ while DAOD 2008-9, *Public Opinion Research*, demonstrates a robust research process that has been made accessible to all DND/CAF organizations.¹¹¹

DAOD 2008-4, *Public Affairs, Military Doctrine and CAF Operations*, is of particular relevance to this paper because it shows how DND/CAF PA policy (in 1998) recognized that “Public Affairs has an important role to play in supporting information operations planning and execution,”¹¹² with the DAOD further stating that DND/CAF “shall fully integrate PA into the design, development and implementation of information operations at all levels, including policy and doctrine.”¹¹³ This is noteworthy because despite having DAOD 2008-4 as a policy vector through which amendments could have been made, no decisions beyond 1998 regarding the role of PAOs in IO or Defence StratCom have ever been reflected in these DOADs. These policy excerpts illustrate how DND and the CAF have long recognized that PAOs should integrate with IO, but in a support capacity. The proposition of this paper is that IE has become so complex that it is

¹¹⁰ "DAOD 2008-5, Public Affairs Planning and Program Delivery," last modified 1 March, 1998, accessed 1 May, 2021, <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/defence-administrative-orders-directives/2000-series/2008/2008-5-public-affairs-planning-program-delivery.html>.

¹¹¹ "DAOD 2008-0, Public Affairs Policy."

¹¹² "DAOD 2008-4, Public Affairs, Military Doctrine and Canadian Forces Operations," last modified 1 March, 1998, accessed 1 May, 2021, <https://www.canada.ca/en/department-national-defence/corporate/policies-standards/defence-administrative-orders-directives/2000-series/2008/2008-4-public-affairs-military-doctrine-canadian-forces-operations.html>.

¹¹³ *Ibid.*

time for DND/CAF to consider employing PAOs in leadership roles, vice support roles, in both IO and Defence Stratcom.

The details of the existing DAOD framework reveal three important points. First, that despite not having been refreshed in over 20 years, ADM(PA) adherence to best practices from PR theory remain sound and, based on the analysis of their strategy, ADM(PA) appear to be well versed in the practical application of that PR theory within the domestic context. Second, that existing policy is heavily skewed toward a DND application of corporate PA within a domestic context. Third, that DAOD 2008-4, *Public Affairs, Military Doctrine and CAF Operations* has not been updated since 1998. This indicates that no decisions regarding PAO employment in support of IO or Defence StratCom have ever been reflected in official policy. Together, these factors indicate that DND/CAF policy needs a significant review and update, and that the latest decision to cease PA involvement in IO runs counter to policy which remains extant. These factors will be discussed in greater detail in Chapter Seven.

The evolving relationship between PA, IO and Defence StratCom

CF Information Operations was published in 1998. The concept of Defence StratCom did not exist at that time but the concept of IO had reached sufficient maturity that it was recognized as a means to support “overall Canadian Government strategic engagement policy.”¹¹⁴ At that time IO was not focused solely on foreign adversaries, rather, IO involved both the exploitation of others’ information and the protection of one’s own.¹¹⁵ PA was considered a means to provide timely information to both external

¹¹⁴ Government of Canada, *CF Information Operations* (Ottawa, ON: Government of Canada, 1998), 1-3.

¹¹⁵ *Ibid.*, 1-2

and internal audiences, and was to focus solely on the dissemination of factual information to mitigate the risk of adversary misinformation.¹¹⁶ IO and PA were to be tightly coordinated to ensure that all information activities support operational objectives.¹¹⁷

Four key points were gleaned through an analysis of *CF Information Operations*. First, in 1998 IO was comprised of the same information related capabilities today, and directly included Mil PA involvement.¹¹⁸ Second, IO doctrine was completely void of reference to the application of PA within a domestic context. PA was recognized as having a direct role in deployed operations, including offensive IO.¹¹⁹ Third, although the doctrine contained an IO planning process, the process was little more than the OPP with no adherence to PR planning theory. Finally, despite PAOs having more experience planning activities in the IE, operators were responsible for IO planning while PAO's filled support roles as advisors.¹²⁰

Together, these points demonstrate that the idea to leverage PAO expertise in support of deployed CAF operations is not new. However, the doctrine was fundamentally flawed for two reasons. First, the CAF had chosen to prioritize the military planning process, OPP, over modern PR campaign planning models, as detailed in Chapter Four. Second, the CAF failed to appreciate that operations in the IE require leadership by experts in that environment, such as PAOs, rather than operators, who are expert in conventional warfare domains.

¹¹⁶ *Ibid.*, 3-6

¹¹⁷ *Ibid.*, 1-13

¹¹⁸ *Ibid.*, 2-5

¹¹⁹ *Ibid.*

¹²⁰ *Ibid.*, 2-8

CF Information Operations remained in use until 2015, when *Canadian Forces Joint Publication (CFJP) 3-10, Information Operations* was published, having been greatly inspired by NATO's Allied Joint Publication (AJP) 3.10, which had been published in 2009. Aside from the latest CDS/DM Planning Guidance, CFJP 3-10 remains the most current CAF Joint doctrine on IO available.

CFJP 3-10 contains one of the first CAF references to Defence StratCom, which was defined as “a political/military process ensuring that DND/CAF communications and information activities are coherent and mutually reinforcing, closing the gap between DND/CAF actions and messages.”¹²¹ In regard to who would provide operational commanders with a means of ensuring this coherence it was decided that IO staff (operators), vice PA staff, would fulfill this role at the operational and tactical level.¹²²

The CAF also adopted the 2009 NATO definition of IO, verbatim. The definition of IO in CFJP 3-10 is “Info Ops is a staff function to analyse, plan, assess and integrate information activities to create desired effects on the will, understanding and capability of adversaries, potential adversaries and NAC approved audiences in support of Alliance mission objectives.”¹²³ The overall list of information related capabilities remained the same,¹²⁴ and a greater distinction between corporate PA and military IO began to emerge.¹²⁵ While both would support military objectives by seeking to counter adversary actions, such as disinformation campaigns, PA and IO differed with respect to audience, scope and intent. Lacking nearly all semblance to the definition of IO provided above, the

¹²¹ Government of Canada, *Canadian Forces Joint Publication 3-10, Information Operations*, 1-3

¹²² *Ibid.*

¹²³ *Ibid.*, 1-4

¹²⁴ *Ibid.*, 1-8 through 1-12

¹²⁵ *Ibid.*

aim of PA was to “protect the public credibility of CAF by disseminating public information, increasing knowledge and promoting further understanding of military activities among key audiences, both within and beyond the Area of Operations.”¹²⁶ Thus, the focus of PA had started to shift toward the defensive aspects of IO, vice offensive.

CFJP 3-10 proposed that StratCom would serve as a focal point to ensure IO and PA activities were aligned with GC objectives. The overall concept was that SJS would develop a StratCom Framework and StratCom Annexes for strategic-level Operations Plans (OPLAN) to provide IO and PA planners with strategic guidance. This approach would “ensure consistency in the message released by the military to outside audiences and to promote overall effectiveness and credibility of the operation.”¹²⁷ The StratCom Framework would include a strategic narrative, with theatre specific themes and messages, which SJS and ADM(PA) would then use to coordinate political and media aspects of an operation.

Overall, the analysis of CFJP 3-10 highlighted that the CAF adoption of NATO IO doctrine from 2009 significantly advanced CAF doctrine on PA, IO, and Defence StratCom from what had been in place since 1998. The advancement of most relevance to this paper was the CAF plan to maintain cohesion amongst all information activities using a StratCom Framework and OPLAN Annex’s specific to each mission, which is similar to how strategic communication frameworks and PR campaign plans are managed in the private sector. However, what will become clear by the conclusion of this chapter is that although the CAF largely adopted NATO’s plan, it did so without having adequately estimated or allocated the resources necessary to implement such a comprehensive plan.

¹²⁶ *Ibid.*, 1-12

¹²⁷ *Ibid.*, 1-12 through 1-13

CFJP 3-10 itself warns of what might occur if inadequate resources were provided when it stated that,

“every consideration should be given to ensure the SJS StratCom branch is appropriately filled with experienced and qualified subject matter experts...to cope with the information demands from the operational level as well as the requirements of the higher political and military bodies.”¹²⁸

One could easily foreshadow the consequences if SJS were unable to maintain a sufficient number of experienced and qualified communications professionals to develop and maintain a StratCom Framework and generate those OPLAN Annex’s: PA and IO activities would lack the strategic guidance and mechanisms required to coordinate and deconflict their respective activities. This point is critical because nothing in the latest CDS/DM planning guidance appears to acknowledge that SJS is not adequately staffed with the level of expertise required to generate these products. This challenge will be considered in greater detail in Chapter Seven.

The CAF decision to operationalize PA

In 2015, the same year as CFJP 3-10 was published, the CDS at that time, General Jonathan Vance, signalled his intent to “weaponize” the PA branch.¹²⁹ The decision to use the term “weaponize”, received significant negative attention in the Canadian media as it was interpreted as an intent for CAF PA to become more combative with journalists. The CDS later clarified his intent by stating that he was seeking to make the PA branch better by operationalizing it based on his frustration with “a system that has been set up that often does not allow the Canadian [Armed] Forces or DND to provide its viewpoints to the media and others.”¹³⁰

¹²⁸ *Ibid.*, 1-14

¹²⁹ Pugliese, "Chief of the Defence Staff Gen. Jon Vance and the Weaponization of Public Affairs."

¹³⁰ *Ibid.*

It should be noted that the CDS' intent to operationalize PA should not be considered synonymous with an intent to have PAOs assume leadership roles in IO or Defence StratCom as is proposed in this paper. My assessment of the CDS' intent is that he wanted to remove the institutional obstacles that constrain the CAF from leveraging the full range of expertise PAOs. Thus, I interpret his intent as seeking to shift the corporate focus of PA in the CAF more towards an operational focus, with no intent to employ PAOs beyond support and advisory roles. While the CDS' vision failed to recognize the potential to employ PAOs in leadership roles, it does support the position of this paper by showing that the CAF has been unable to fully leverage PAO expertise.

After the CDS announced his intent to operationalize PA, DND and the CAF worked collaboratively to implement his vision. By 2018 multiple working groups had been established to develop new definitions, generate an IO problem definition paper, and write an employment concept for information related capabilities.¹³¹ The CAF were to develop a StratCom and IO Concept of Operations (CONOPS) with the goal of providing an explanation of StratCom and IO at the strategic level and support the development of StratCom and IO implementation directives.¹³² Notably, neither could be found during the research phase of this paper.

What DND/CAF had been developed by 2019 was a *Conceptual Framework for DND/CAF Operations in the Information Environment*, included below as Figure 5.1, and a *Military StratCom and PA Operationalisation Force Development Matrix*, included below as Figure 5.2.

¹³¹ Government of Canada, *Information Operations PDNA Leveling Brief*, 16-18

¹³² *Ibid.*, 19

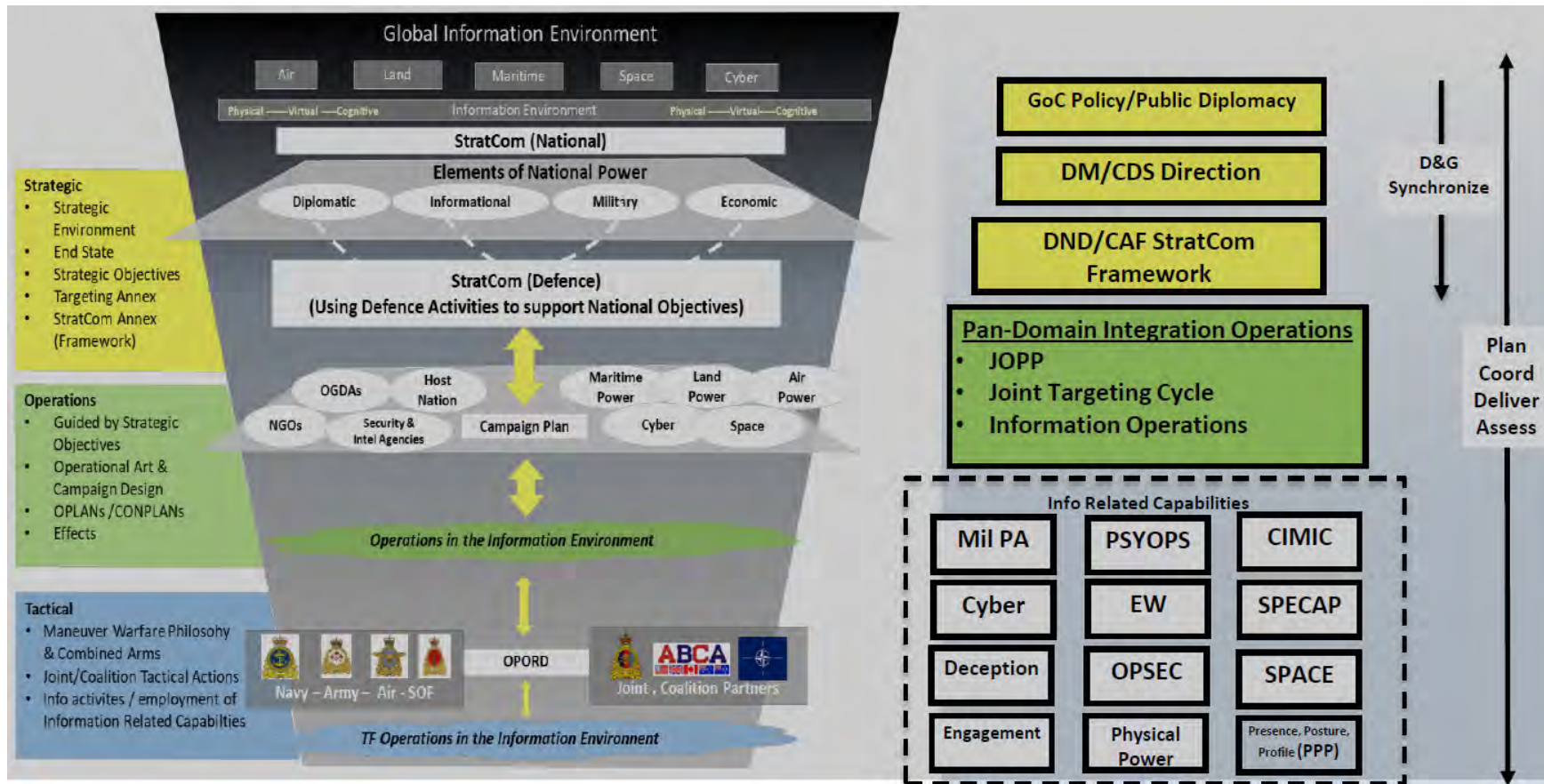


Figure 5.1: Conceptual Framework of Defence Operations in the Information Environment¹³³

¹³³ *Ibid.*, 11

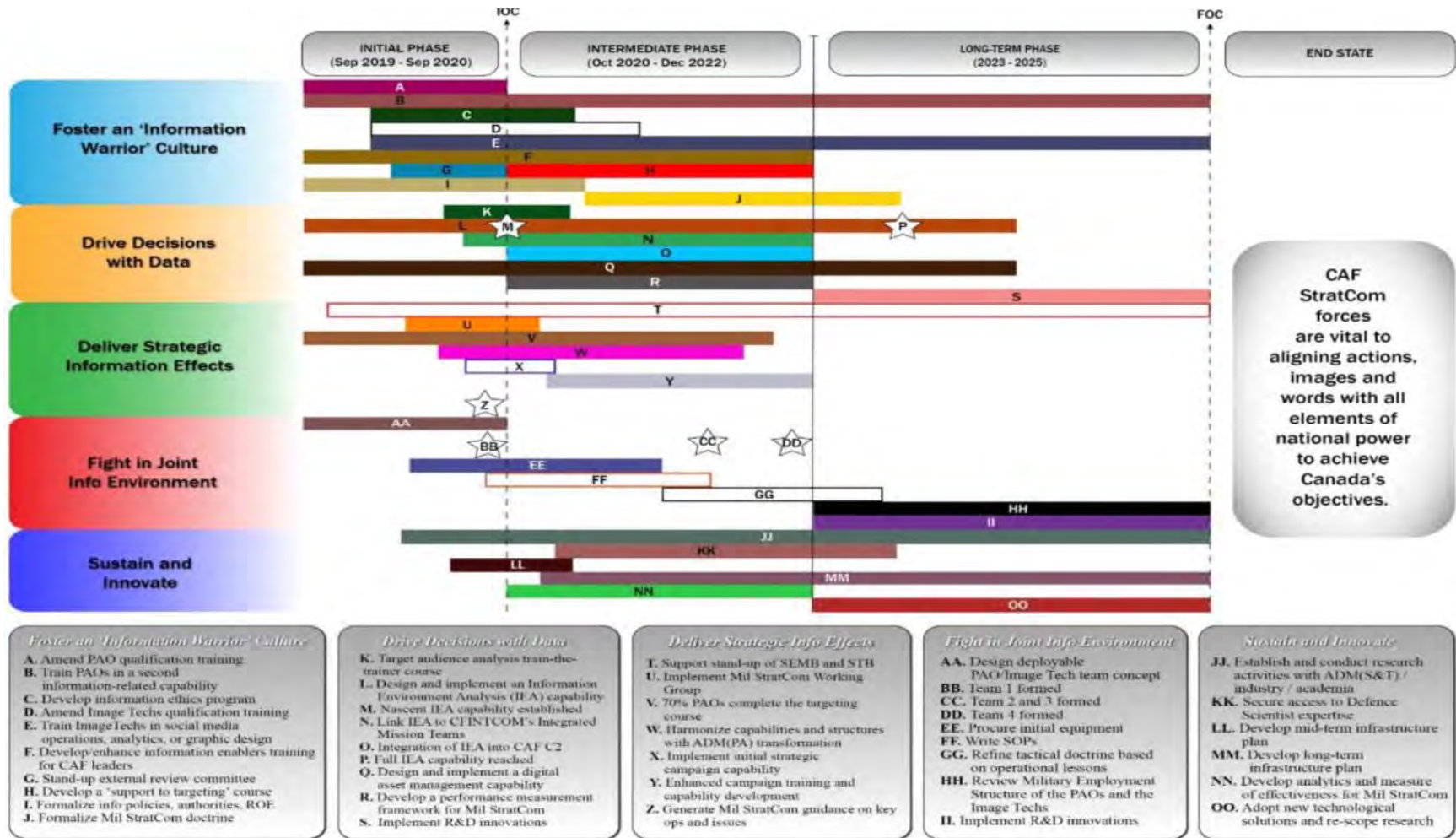


Figure 5.2 Mil StratCom and PA Operationalization Force Development Matrix¹³⁴

¹³⁴ Ibid., 44

Figure 5.1 is presented as a means to consolidate and graphically depict the various topics discussed in this paper. The most important aspect of Figure 5.1 is that it clearly shows the hierarchical relationships between National StratCom (Government of Canada), Defence StratCom (DND/CAF), IO and the various information related capabilities, of which Military PA is one. This paper proposes that the knowledge and experience PAOs develop at the “bottom” of this hierarchy make them ideally qualified for senior leadership positions at greater levels in the hierarchy.

Where Figure 5.1 provides a macro overview, Figure 5.2 provides a micro overview of how DND/CAF planned to operationalize PAO using a three phased approach that spanned a timeline of 2019-2025.¹³⁵ Attention should be drawn to the bottom of Figure 5.2, where 31 separate initiatives are listed. The most important initiatives to the topics presented in this paper are that ADM(PA) intended to: amend PAO qualification training; provide a train-the-trainer course on target audience analysis; formalize Defence StratCom doctrine and IO policies and authorities; and develop analytics and measures of effectiveness for Defence StratCom. The initiatives are important because they illustrate how ADM(PA) was directly involved in the force development of IO and Defence StratCom, with a clear intent to continue to support those efforts through 2025.

A healthy dose of constructive criticism and debate

Before moving into the events which led to the reset in November 2020, it is worth noting that not all CAF organizations were happy with how the plan was progressing. In 2020 the Commander of CJOC, LGen Michael Rouleau, referred to the DND/CAF

¹³⁵ *Ibid.*, 44

approach toward information related capabilities as “uncoordinated and underutilized,”¹³⁶ noting that their use was “ill-defined and currently being employed ad hoc on operations, [and that] the lack of focus and synchronization has limited their effectiveness.”¹³⁷ He noted that despite some documentation being developed, planners were often brought into the planning process too late, being regarded as an “additional function instead of an integral or critical part of the planning process.”¹³⁸ Thus, while Figure 5.1 and Figure 5.2 show that DND/CAF had developed comprehensive plans to address recognized shortcomings, as 2020 saw those plans transition into implementation, things were not going smoothly.

Following this healthy critique with his own solution, Comd CJOC volunteered his own organization to champion IO efforts by publishing the *CJOC IO FE Concept* in 2020. Its core premise was that the traditional DND/CAF approach has become insufficient in the modern world and that an institutional shift in mindset will be required to move the organization from traditional, process based thinking, toward a more modern, outcomes-based thinking.¹³⁹ Comd CJOC noted that although SJS was the functional authority for IO the “battle rhythm and lack of staff [at SJS] presents difficulties developing Info Ops for the CAF.”¹⁴⁰ This statement demonstrates that SJS has not been adequately resourced to fill the roles of functional authority for IO and co-functional authority for Defence StratCom, another challenge that will be discussed in Chapter Seven.

¹³⁶ Government of Canada, *Joint Information Operations Force Employment Concept* (Ottawa, ON: Government of Canada, 2020), 9.

¹³⁷ *Ibid.*, 8

¹³⁸ *Ibid.*, 9

¹³⁹ *Ibid.*, 2

¹⁴⁰ *Ibid.*, 20

Conclusion

This chapter provided a detailed look the evolution of PA, IO, and Defence StratCom in DND/CAF over the past two decades. As was shown in Chapter Two, all three share a common history but had evolved along separately based on military and non-military application. This separate evolution speaks to why a DND organization, ADM(PA), leads PA on behalf of the Defence team and is more corporately focused, while SJS leads IO and Defence StratCom on behalf of the CAF.

This chapter then described how after the CDS signaled his intent to operationalize PA, DND and the CAF worked collaboratively to develop comprehensive plans. However, as these plans started to be implemented cracks began to show which led to some organizations, such as CJOC, voicing their concern and submitting their own proposals to address the lack of progress.

Overall, this chapter illustrated that despite DND and the CAF having different perspectives on the role of PA, both were committed to expanding the role of PAOs. This speaks to why the intent to expand the role of PAOs prior to the reset was correct. The next chapter will show how ADM(PA) enthusiasm for the plan to expand the role of PAOs employed in the CAF slowly waned as criticism from the Canadian media mounted following a series of events in 2020.

CHAPTER SIX - CASE EXAMPLES AND A NEW PLAN

Public opinion has entered life at many points as a decisive factor...the business of the public relations counsel is somewhat like the business of the attorney—to advise his client and to litigate his causes for him...(such a) defense has always been accorded a formal hearing by judge and jury, this has not been the case before the court of public opinion.

- Edward Bernays, *Crystallizing Public Opinion*

Introduction

This chapter will consider the events that occurred in 2020, introduce the new plan moving forward, and present the final arguments to support that why the new plan should consider what is being proposed in this paper. The first section will provide a detailed assessment of the events that preceded the ADM(PA) decision to cease all PA involvement in CAF influence activities and IO in November 2020. This will provide additional context to the current situation and support the proposition that the original intent to expand the role of CAF PAOs was correct by showing how these events had little to no correlation with the CAF intent to operationalize PAOs. The second section will use the CDS/DM planning guidance to introduce the new plan to re-evaluate the DND/CAF approach that had led to the reset. After having explained the evaluation plan, the third section will present the final arguments for why the evaluation should consider PAOs for leadership and key staff responsibilities in IO and Defence StratCom.

Missteps in CAF efforts to modernize

In October of 2020 the CAF made national media headlines when CAF “information warfare specialists”¹⁴¹ inadvertently released propaganda training material with an official logo forged to appear as though it had been issued by the Nova Scotian

¹⁴¹ Ottawa Citizen (Online), "Forged Letter Warning about Wolves on the Loose Part of Canadian Forces Propaganda Campaign that Went Awry," *The Ottawa Citizen*, 2020. <https://search-proquest-com.cfc.idm.oclc.org/docview/2451078043?pq-origsite=summon>.

government to warn residents about wolves in the area. In addition to misusing a government logo, the letter was also attributed to a real Nova Scotia government employee. These decisions were considered well beyond ethically acceptable, particularly within a domestic context where DND/CAF are not authorized to conduct any IO activities that may impact the Canadian public.¹⁴²

After DND/CAF investigated the matter it became clear that neither ADM(PA) or PAOs were involved in this event. A member from the Halifax Rifles, a reserve unit, had been conducting an unsanctioned training activity when some of that material was inadvertently released into the public. This event should not have occurred but explaining how it did is relevant to what is being proposed in this paper. Figure 5.1 shows how PA is but one of several information related capabilities. While the others are beyond the scope of this paper, one of them, Psychological Operations (PSYOPs) is one that is generated and maintained by the Canadian Army. Thus, this event was a CA reserve training activity gone awry and in no way should it have impacted the plan to operationalize PAOs.

The second 2020 event involved the CAF inclusion of IO related capabilities in its domestic COVID-19 response. The CAF established a precision information team (PiT) that was used to collect and analyze publicly available information from Canadian social media accounts. Some of this information was then provided to Ontario premier Doug Ford to offer insight on how his electorate was responding to his handling of the pandemic. After learning that Federal resources from the CAF were used to develop intelligence products for a Provincial government by extracting social media information

¹⁴² *Ibid.*

from Canadians, the media and their subsequent reporting of this event was highly critical.¹⁴³

Once again one could logically conclude that this event had no correlation with ADM(PA) or the CAF intent to operationalize PAOs. Neither ADM(PA) nor PAOs were responsible for the establishment of a PiT, the collection of information, or the decision to provide assessment products to the Ontario premier. Despite the CAF collection of information on Canadian citizens having nothing to do with PAOs, this event contributed to the decision to cease PAO involvement in influence activities and IO.

The final event does have a direct linkage to ADM(PA) and its support to expanding the role of PAOs in the CAF. As described in Chapter Five, by 2019 ADM(PA) had developed a comprehensive action plan which was included as Figure 5.2. One action item in that plan was the provision of advanced training for PAOs. In support of that initiative, ADM(PA) contracted the provision of advanced strategic communication training for 40 personnel from the PA branch, at a cost of more than \$1 million dollars.¹⁴⁴ By all accounts this scenario should have served as a practical example to illustrate that DND recognizes the value of having highly trained PA professionals, as evidenced by their willingness to invest in them. Reports soon surfaced, however, connecting the training to a behavioural dynamics methodology developed by the Strategic Communication Laboratories (SCL) Group.¹⁴⁵ Media coverage focused on the fact that the SCL Group had been linked to military propaganda campaigns, and that it

¹⁴³ Taylor, "CAF Halts Controversial PR Plan: ON TARGET."

¹⁴⁴ David Pugliese, "Canadian Military Spent More than \$1M on Controversial Propaganda Training," *The Times*, 2020. <https://search-proquest-com.cfc.idm.oclc.org/newspapers/canadian-military-spent-more-than-1m-on/docview/2450711536/se-2?accountid=9867>.

¹⁴⁵ *Ibid.*

was the parent firm of Cambridge Analytica, the company involved is US President Trump's political campaign. Following these reports, the training was cancelled immediately with no indication that it would take place again in the future.

An acknowledgement that gaps in PAO training would need to be addressed if the proposals in this paper were to be accepted was first introduced in Chapter Four. This event serves as a practical example to further reinforce that point. One of the core arguments in this paper is that PAOs are the equivalent of PR professionals in the private sector, and that this level of expertise is required to lead IO and Defence StratCom in the CAF. A recognized shortcoming in this argument is that it infers PAOs also receive training that is equivalent to PR professionals, which they do not.

In terms of IO, PAOs could likely assume greater roles immediately based on their basic PA training, access to CAF IO coursing internally, and exposure to CAF operational planning at the Canadian Forces College. Strategic communications training would be challenging however, as no such training is available within DND/CAF. As the example above shows, ADM(PA) had been able to source externally contracted training, but was strongly criticized by the media for doing so. This situation shows how ADM(PA) supporting the CAF intent to operationalize PAOs has placed it in a difficult position; no internal DND/CAF StratCom training exists, but sourcing external training was criticized.

After these events ADM(PA) made the decision to cease PA involvement in CAF influence activities and IO in November 2020, with the CDS/DM planning guidance being released shortly afterward. The planning guidance directs the CAF to re-evaluate its approach and provides a timeline for the evaluation to take place, both of which will be discussed next.

An opportunity for change

All information in this section has been summarized directly from the CDS/DM planning guidance. The new plan consists of three phases that will take place between 2021 and 2023. Phase 1, which was supposed to have started in January 2021 and be concluded by June 2021, was intended to focus on education and integration.¹⁴⁶ The SJS, as the functional authority for IO and co-functional authority with ADM(Pol) for Defence StratCom, were to collaborate with ADM(PA), as the functional authority for PA, and other DND/CAF organizations to conduct a professional development needs analysis. Additionally, SJS was to lead a doctrinal and policy review and refresh for all existing concepts and information related capabilities.¹⁴⁷ None of these documents could be found as this paper was being written, though they may exist as draft, but inaccessible.

Phase 2 is expected to take nearly two years, starting in June 2021 and ending in March 2023. This phase is intended to focus on the implementation of the PDNA and the policy and doctrine refresh that should have been completed during Phase 1. Most notably, it is assumed that by the end of Phase 2, “there will clear sustainable career paths to force generate and employ skilled practitioners in the respective capabilities and appropriate training to current and future commanders.”¹⁴⁸ This is important because, if the proposals contained in this paper were to be considered and accepted in Phase 1, then Phase 2 would provide a clear means to address the most notable challenges that will be discussed in Chapter Seven.

¹⁴⁶ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 16

¹⁴⁷ *Ibid.*, 16

¹⁴⁸ *Ibid.*, 17

Phase 3 is described as “continuous,” serving as a standing mandate to prioritize collaboration between DND and the CAF, other government departments, and allies to ensure alignment.¹⁴⁹

The activities described in these phases suggest that no final solution has yet been decided on whether the role of PAOs could be expanded to include IO and Defence StratCom. Recognizing that the evaluation will involve several organizations from both DND and the CAF, the remainder of the paper will refer to the team responsible for conducting the evaluation simply as the “evaluation team.” The next section shows why the evaluation team should consider the proposals of this paper.

Why PAOs are well suited to lead IO and Defence StratCom

This paper has introduced and discussed many reasons why the evaluation team should consider PAOs for greater leadership roles in CAF IO and Defence StratCom. This section seeks to consolidate these reasons into three final arguments. The first is that PAO knowledge and education provide them a skillset that is necessary to effectively coordinate IO and manage Defence StratCom. The second is that PAO leadership of PA in both DND and the CAF result in them gaining corporate and military experience operating in the IE through the application of their skillset in support of domestic and international CAF operations. The final reason is that the traditional CAF model of having planning, operations, and the most senior levels of military command typically filled by warfare officers, fails to appreciate that the complexity of the modern IE requires a new cadre of leadership who are expert at working in the IE.

¹⁴⁹ *Ibid.*, 17

To the first point, PR professionals, even outside of the military, are trained specifically to plan and execute operations in the IE and coordinate large groups of specialized information teams as part of strategic communications. This has been the case since organizations began using press agents and PR professionals. As described by Lippmann, “the great corporations have them [press agents], the banks have them, the railroads have them, all the organizations of business and of social and political activity have them, and they are the media through which news comes.”¹⁵⁰ The reasons that early PR advocates sought the establishment of PR as a profession akin to that of a doctor or lawyer, remain the same reasons PAOs should have leadership roles in IO and Defence StratCom. Bernays outlines several of these reasons:

“His [PR professionals] ability to create those symbols to which the public is ready to respond; his ability to know and to analyze those reactions which the public is ready to give; his ability to find those stereotypes, individual and community, which will bring favorable responses; his ability to speak in the language of his audience and to receive from it a favorable reception are his contributions. The appeal to the instincts and the universal desires is the basic method through which he produces his results.”¹⁵¹

What makes the PAO skillset unique is therefore their ability to analyze and understand the IE and the cognitive dimension of their intended audiences. When combined with knowledge of communication methods, such as the media, and experience in how those methods can be leveraged to support organizational objectives, their skillset becomes as useful to IO and Defence StratCom as it is to PA.

In addition to being a courier of information, PAOs are also a visionary, artist, and promoter of that information. By design, PAOs are trained and educated to be flexible and

¹⁵⁰ Lippmann, *Public Opinion*, 344

¹⁵¹ Bernays, *Crystallizing Public Opinion*, 173

cross-disciplinary. As members of the organization PR professionals must be deeply familiar with organizational complexity so they can collect organizational information and align it with the organization's strategic communications plan.¹⁵² They must be capable of generating publicly consumable products and coordinating their distribution through numerous communications channels.

Neither the media nor the public have a shortage of information at their disposal, however, and the number of organizations vying to have their message reach its intended audience often exceed the capacity for the media to publish, or the public to consume those messages.¹⁵³ PR professionals must therefore know how to generate compelling narratives and themes that are more likely to be prioritized over other sources. Whether they use these skills domestically or in support of IO against foreign adversaries, the fundamental principles remain congruent. Only PAOs have knowledge and education that is founded on well-established PR theory. Thus, the skillset of PAOs make them uniquely qualified for leadership roles in IO and Defence StratCom.

Moving to the second argument, as discussed in the preceding chapters IO and Defence StratCom in the CAF share many similarities with PR and strategic communications from the private sector. Assuming this is the case, a weakness in this position is that it suggests that a civilian PR practitioner could also lead IO or Defence StratCom activities. While there is little doubt that a civilian practitioner would make an excellent special advisor, a civilian PR expert would likely find it difficult to excel at IO planning or Defence StratCom coordination on account of their lack of familiarity with

¹⁵² Lippmann, *Public Opinion*, 345

¹⁵³ Bernays, *Crystallizing Public Opinion*, 194-195

CAF operations and the CAF as an organization. PAOs, however, have experience with both.

PAOs, despite falling under ADM(PA), are directly integrated with the CAF client organization to which they have been seconded. They work with their military peers, report directly to their respective military commander(s), and provide PA support to military objectives. Moreover, they fulfill this function both domestically and in support of international CAF operations, resulting in PAOs frequently working directly with Allies, international media, and foreign publics. This type of expertise operating in the IE is nonexistent outside of the PAO trade, a factor that is made only more evident when considering that PAOs execute their PA function at the tactical, operational, and strategic levels in both DND and the CAF. While the skillset of PAOs make them akin to PR professionals, their experience working in support of CAF operations enable them to understand how best to apply that expertise within a military context. Thus, PAOs offer knowledge and experience in the practical application of PR theory within a military context, making them uniquely qualified for leadership roles in IO and Defence StratCom.

The final reason that PAOs should have a leadership role in IO and Defence StratCom is that the complexity of the IE demands that CAF leadership in these areas have knowledge and experience in planning and executing activities in the IE. Modern challenges required modern solutions in terms of what warfare looks like in the IE, and who should be coordinating information activities. One recognized challenge with the position of this paper is that the traditional CAF hierarchy has been developed around the notion that operators plan and execute operations while support trades plan to support operators. While the previous statement is admittedly an oversimplification, the planned

evaluation of PA, IO, and Defence StratCom will provide an opportunity for DND and the CAF to truly evaluate whether the expertise of non-warfare specialists, such as PAOs, could make them ideally qualified to lead specialized PA, IO, and Defence StratCom teams.

While senior leaders from operator trades are considered experts in their respective conventional environments, be it land, sea, or air, caution should be exercised if assuming conventional warfare expertise is equally applicable to IO and Defence StratCom activities. Very few senior warfare officers, and even fewer general or flag officers, have experience with planning and executing operations in the IE. Due to traditional military hierarchy, however, warfare operators at SJS and CJOC have been made responsible for IO and Defence StratCom instead of PAOs, who often serve in a support or advisory role. This paper contends that just as the CAF relies upon operators to lead capability development efforts in conventional warfare domains, that it give equal consideration to relying on PAO expertise in the IE to lead IO and Defence StratCom capability development.

Conclusion

Public opinion may have been more forgiving had the events described above occurred at different times. However, the fact that they had all occurred in 2020, while the CDS sought to operationalize PA in the CAF, devastated attempts to expand the role of PAOs. This chapter demonstrated how the original intent to expand the role of PAOs was correct because the decision to cease PA involvement was too heavily influenced by negative media attention. Of the events described above only one was related to ADM(PA) and it involved addressing a recognized training gap through the provision of externally sourced StratCom training to PA personnel. Thus, the decision to cease that

training, and cease PA involvement in CAF influence activities and IO was largely predicated on criticism from the media.

After having provided an overview of the upcoming evaluation, the final section sought to consolidate the various points made throughout the paper into three reasons the evaluation should consider PAOs for leadership roles in CAF IO and Defence StratCom. These three reasons can be summarized by stating that the unique combination of theoretical knowledge, military exposure, and practical experience in planning and coordinating activities in the IE result are why PAOs are uniquely qualified to assume leadership and key staff responsibilities in not only PA, but IO and Defence StratCom as well.

If the evaluation team were to endorse this proposal, it is understood that many challenges would still need to be overcome. Many of these challenges have been introduced throughout the paper already. The purpose of the next chapter is to discuss the most important of those challenges and provide recommendations for each.

CHAPTER SEVEN – CHALLENGES AND RECOMMENDATIONS

Introduction

This chapter will consider what challenges would need to be overcome if the propositions contained in this paper were to be supported. While it is understood that there are likely to be more challenges than those described below, this chapter will focus on three most critical: policies, concepts, and doctrine; resource allocation and expectation management; and bridging institutional gaps.

Policies, concepts, and doctrine

The first major challenge is that DND/CAF policy, concepts, and doctrine on PA, IO, and Defence StratCom are either outdated or non-existent.

In regard to policies, Chapter Five showed how grossly outdated the PA policy has become, with the majority of the DAOD 2008 series not having been updated since being published in 1998. While it is possible that nothing of enough significance has changed to merit the amendment of PA policy, the CDS intent in 2015 to operationalize PAOs alone should have justified doing so. Acknowledging that an overall review and update of PA policy is necessary, the specific recommendation of this paper is that the evaluation team should consider amending *DAOD 2008-4, Public Affairs, Military Doctrine and CAF Operations* to reflect the potential for PAOs employed in the CAF to assumed leadership positions in CAF IO and Defence StratCom.

In terms of IO or Defence StratCom, no policies could be found. Lack of policy in these areas is acknowledged in the CDS/DM planning guidance, which directs SJS and ADM(PA) as functional authorities to develop or refresh policies as applicable.¹⁵⁴ This

¹⁵⁴ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 16

paper concurs with the planning guidance direction and thus therefore suggests the most critical challenge in this area will be the composition of the team(s) who will be updating and developing new policy. The team must include, as a minimum, senior personnel from SJS and ADM(PA) who have practical experience planning PA, IO, and Defence StratCom activities combined with experience executing those activities both domestically and in support of CAF operations. If the evaluation team is unable to find such expertise, the plan outlined in the planning guidance is unlikely to succeed.

In terms of concepts, I was unable to find PA, IO, or Defence StratCom concept papers during my research. This was not unexpected for PA, given that PA has existed for many years, making it reasonable to assume that any PA concept papers that were written have since been implemented and are no longer being updated. IO and Defence StratCom, however, are recent capability development initiatives yet no concept papers could be found for either prior to the 2020 *CJOC IO FE Concept* that was assessed in Chapter Five. A CJOC brief from 2020 indicated that an IO and Defence StratCom concept of operations was supposed to have been drafted and approved no later than May 2020 however no such document could be found as this paper was being written.¹⁵⁵ Assuming such a draft does exist, the recommendation of this paper is that the evaluation team ensure review it to ensure alignment with the new direction contained in the CDS/DM planning guidance then ensure it is officially approved and released before any new plans are implemented.

¹⁵⁵ Government of Canada, *Information Operations PDNA Leveling Brief*, 19

Finally, *Joint Public Affairs*, published in 2004, covers PA doctrine while *CFJP 3-10*, published in 2015, covers IO doctrine while introducing StratCom doctrine.¹⁵⁶ Both documents recognize PA as an information related capability that enables IO however neither indicate that PAOs could assume positions of leadership in any greater capacity than that within their PA function. While both documents will likely need to be updated based on the outcomes of the evaluation, for the purposes of this paper, neither appear to stand in opposition to having PAOs assume leadership roles in IO and Defence StratCom in their current form. Thus, the recommendation of this paper is for the evaluation team to consider why ADM(PA) has been generally successful in implementing *Joint Public Affairs* while the CAF has struggled to implement its own doctrine from CFJP 3-10.

The final recommendation related to policies, concepts, and doctrine, is that the evaluation team should conduct a comprehensive review of NATO policies and their potential applicability to DND/CAF. This recommendation comes after having conducted such a review and concluding that NATO, at least conceptually, has a firm grasp of how PA, IO, and Defence StratCom can be combined into a cohesive framework that is largely congruent with both PR and strategic communications theory from private industry. As but one example, all of NATO's communications capabilities and information staff functions (including Mil PA, IO, and StratCom) are grouped under either a single Chief StratCom or Director of Communications.¹⁵⁷ Contrast this against DND/CAF, where there is no clear communications lead amongst ADM(PA), SJS, CJOC, and the

¹⁵⁶ Government of Canada, *Joint Public Affairs* (Ottawa, ON: Government of Canada, 2004).; see also Government of Canada, *Canadian Forces Joint Publication 3-10, Information Operations*

¹⁵⁷ NATO, *NATO Military Policy on Strategic Communications* (SHAPE, Belgium: NATO, 2017), 1. <http://stratcom.nuou.org.ua/wp-content/uploads/2020/01/NATO-MILITARY-POLICY-ON-STRATEGIC-COMMUNICATIONS.pdf>.

environmental commanders, and this example speaks to how the evaluation team should strongly consider NATO's approach during their analysis. Therefore, until such time as Canadian-specific policy, concepts, and doctrine are made official, and published, the recommendation of this paper is for the evaluation team to strongly consider adopting the *NATO Military Policy on Strategic Communications*,¹⁵⁸ the *NATO Military Policy for Information Operations*,¹⁵⁹ and the *NATO Military Public Affairs Policy*.¹⁶⁰

Resource allocation and expectation management

In 2015 CFJP 3-10 rightly foreshadowed that, if inadequately resourced, SJS would be challenged as functional authority for IO and Defence StratCom:

“every consideration should be given to ensure the SJS StratCom branch is appropriately filled with experienced and qualified subject matter experts...to cope with the information demands from the operational level as well as the requirements of the higher political and military bodies.”¹⁶¹

Yet, the CDS/DM planning guidance introduces several opportunities for history to repeat itself. For example, SJS will remain the functional authority for IO and the co-functional authority for Defence StratCom in combination with ADM(Pol). The CDS/DM planning guidance then adds new tasks for SJS such as: develop a process for the generation and promulgation of Defence StratCom narratives and messages; identify resource requirements; address policy and doctrine deficiencies; and develop an action plan to deliver on the milestones identified in the planning guidance.¹⁶² These are but

¹⁵⁸ NATO, *NATO Military Policy on Strategic Communications*

¹⁵⁹ NATO, *Draft MC 0422/6: NATO Military Policy for Information Operations* (SHAPE, Belgium: NATO, 2018).
https://shape.nato.int/resources/3/images/2018/upcoming%20events/MC%20Draft_Info%20Ops.pdf

¹⁶⁰ NATO, *NATO Military Public Affairs Policy* (SHAPE, Belgium: NATO, 2011).
<https://www.nato.int/ims/docu/mil-pol-pub-affairs-en.pdf>

¹⁶¹ Government of Canada, *Canadian Forces Joint Publication 3-10, Information Operations*, 1-14

¹⁶² Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 18-20

several excerpts from the full list. Simply put, this list of new tasks represents a heavy burden for SJS, given the resourcing issues that have already been discussed. Thus, unless SJS are sufficiently resourced with knowledgeable and experienced personnel, implementing the CDS/DM planning guidance will likely face the same challenges as the plan in CFJP 3-10 because the fundamental issue of lack of personnel and expertise will remain unresolved.

Inadequate resourcing is not only a challenge for SJS, but for ADM(PA) as well. As described in Chapter Five, ADM(PA) is responsible for the provision of PA services for both DND and the CAF, and for the force generation of PAOs. However, in 2020 approximately 60 of 180 PAOs reported directly to ADM(PA), while the remainder were distributed throughout Canada and abroad to support 80 other organizations.¹⁶³ Thus, it is recognized that ADM(PA), as it currently exists, would also be limited in its ability to implement the proposals in this paper due to human resource constraints.

Just as the CDS/DM planning guidance added new tasks to SJS as described above, it also added new tasks for ADM(PA). A non-exhaustive list of summarized ADM(PA) tasks includes: develop a PA Branch modernization plan aimed at better understanding and informing audiences; provide communications advice; conduct communications planning in support of defence strategy; and enhance the reputation of DND/CAF through engagement and the delivery of information programs.¹⁶⁴ The guidance also reiterates that ADM(PA) are solely responsible for the coordination of national DND and CAF PA programs and activities directly on behalf of the CDS and

¹⁶³ Government of Canada, *Information Operations PDNA Leveling Brief*, 48

¹⁶⁴ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 21

DM, and that ADM(PA) will support SJS and ADM(Pol) Defence StratCom efforts by providing communications specific analysis and advice.¹⁶⁵ Thus, this list represents another list of tasks for ADM(PA) to action and, like the new functions assigned to SJS, it is unlikely that ADM(PA) will have excess capacity to accommodate so many new tasks.

A logical argument could be made that if neither DND nor the CAF have the capacity to complete these new tasks then efforts should first be made to address the lack of capacity before new tasks are assigned. Such an approach may not be realistic, however, as modern threats are already well versed in operating within the IE and the CAF must be able to respond whether it is prepared to do so or not.

Thus, this paper recommends that the evaluation team conduct a detailed analysis of resources required to implement existing tasks before assessing what would be required to expand the role of PAOs into IO or Defence StratCom. Only after having established a realistic plan to address existing deficiencies should serious consideration be given to what resources would be required to implement the proposals in this paper. The CDS/DM planning guidance does acknowledge that new positions will be required, and highlights that the VCDS will be responsible for ensuring resources are managed and allocated through existing DND and CAF mechanisms.¹⁶⁶ Therefore, the viability of what is proposed in this paper is realistically constrained by what resources the VCDS is able to allocate.

¹⁶⁵ *Ibid.*, 21-22

¹⁶⁶ *Ibid.*, 18

Bridging institutional gaps

A key difference between the previous approach and the new CDS/DM planning guidance is that IO will be focused solely on foreign adversaries, a change likely in direct response to the occurrences in 2020.¹⁶⁷ Therefore, the proposals made in this paper, in effect, recommend that PAOs coordinate IO activities in support of military operations against foreign adversaries. This is an issue because the role of PAOs is to inform audiences, not to be employed in a warfare role against foreign adversaries. This represents an institutional gap because PAOs work for ADM(PA), but report directly to the CAF chain of command to which they have been seconded. Maintenance of the existing organizational structure may therefore preclude PAOs from working on IO. Thus, the proposition in this paper calls into question whether ADM(PA), a DND organization, are willing to have their personnel employed in support of military operations while working for the CAF. Given the ADM(PA) decision in November 2020 was to cease PA involvement in IO, bridging this institutional gap will likely be a significant challenge.

It is recommended that the CAF evaluation team work collaboratively with ADM(PA) to discuss whether the reasoning behind the November 2020 decision was, as this paper suggests, more in response to media criticism than ADM(PA) opposition to expanding the role of PAOs. If both ADM(PA) and the CAF agree that a pause was necessary to mitigate media criticism and set aside time to address the policy, concept, doctrine and resource challenges as described above, then the plan outlined in the CDS/DM planning guidance affords the CAF an opportunity to do so.

¹⁶⁷ Government of Canada, *DND and CAF Policy on Joint Information Operations* (Ottawa, ON: Government of Canada, 2018), 2-14.

Conclusion

While the challenges described above affect the viability of what is proposed in this paper, none are insurmountable. The CDS/DM planning guidance either directly or indirectly acknowledged that these challenges exist, then gave the CAF a window of opportunity from January 2021-March 2023 to come up with a viable plan that addresses these issues and provides DND/CAF with a way ahead. That said, there is potential for this window of opportunity to be squandered as well. The plan is heavily reliant on the evaluation team being sufficiently resourced with knowledgeable staff who understand the intricacies of these topics and are available to focus on the evaluation without being pulled away to address other responsibilities. The plan outlined in the CDS/DM planning guidance is ambitious, but if it is successful both DND and the CAF will be much better positioned to operate in the modern IE.

CHAPTER EIGHT - CONCLUSION

The first four chapters of this paper focused on showing that PAOs are the DND/CAF equivalent of PR professionals in the private sector and making the case that just as PR professionals coordinate PR campaigns and lead strategic communications teams, so too should PAOs coordinate IO campaigns and lead Defence StratCom. The paper began by using historical examples to show how PA, IO, Defence StratCom share a similar history, and theory, to PA, PR, and strategic communications, with *audience* and *intent* differentiating each. It was shown that PA is but one specialist subset within the PR profession that focuses on the application of PR theory within a government context, which is why PAOs in DND/CAF are akin to PR professionals in the private sector. After having established that PAOs are the PR professionals of DND/CAF, nearly a century of PR best practices were used as reference material to develop a new model intended to apply to PA, IO, and Defence StratCom. The new model was then used as an analysis tool to illustrate that the *DND and CAF PA Strategy 2018-2020* is founded on best practices from PR theory, with the implication that PAOs are expert in the practical application of PR theory given their role in its implementation.

Chapters Five and Six then shifted focus inward toward DND/CAF. An overview of the current PA function and how PAOs are employed in DND/CAF was provided for context. Next, the paper provided a detailed examination of how the CAF had sought to better integrate PAOs into CAF activities since 2015, with those efforts culminating in the development of comprehensive action plans by the end of 2019. However, just as the plans started to be implemented in 2020, they were completely derailed after a series of events led to significant media criticism and resulted in ADM(PA) deciding to cease all PA involvement in CAF influence and IO activities.

The CDS/DM planning guidance was promulgated shortly thereafter, providing the CAF a window of opportunity from January 2021 to March 2023 to consider what went wrong and come up with a viable plan to address PA, IO, and Defence StratCom challenges. While the plan articulated in the CDS/DM planning guidance is ambitious, if successful it will address the majority of the most fundamental issues that have constrained PA, IO and Defence StratCom capability development for decades. Chapter Six concludes by presenting the overall case in support of the paper's proposition, which can be summarized by stating that the unique combination of theoretical knowledge, military exposure, and practical experience in planning and coordinating activities in the IE make PAOs uniquely qualified to assume leadership and key staff responsibilities in not only PA, but IO and Defence StratCom as well.

Finally, the challenges most applicable to the proposition of the paper were considered in Chapter Seven, with the most critical being: inadequate policies, concepts, and doctrine; resource allocation and expectation management; and the need to bridge institutional gaps. Each challenge was accompanied by recommendations, such as adopting NATO's approach, properly resourcing the evaluation team and the outcome of their evaluation post 2023, and recognizing that the CAF needs to listen to DND's concerns then work collaboratively to ensure whatever new approach is chosen is favourable to the entire Defence team.

Overall, this paper found that plans to operationalize PAOs were correct, and that ADM(PA) decision to cease PA involvement does have a silver lining. DND/CAF has been given a chance to reconsider and fix those aspects of the plans that were lacking and an opportunity to consider new ideas. One of those new ideas should be the employment of PAOs in leadership positions and key staff roles in IO and Defence StratCom.

ANNEX A: GLOSSARY

Audience: “[The] total number of people who may receive an advertising message delivered by a medium.”¹⁶⁸

Defence Strategic Communications (StratCom): “Defence StratCom is a planning concept initiated at the strategic-level that recognizes all defence actions (or inactions) have communicative effect. As part of Defence StratCom, strategic staffs ensure that military plans are coherent with one another and aligned to Government intent, instead of initiating activities and communicating as an afterthought. The output of this planning activity is the establishment of unifying strategic narratives that inform military plans.”¹⁶⁹

Information Activities (IA): “An activity intended to affect one or more dimensions of the information environment.”¹⁷⁰

Influence Activities (IA): “coordinated activities to create desired psychological effects on the understanding, perception, attitudes, and will of adversaries, potential adversaries, and other approved parties in support of overall objectives during foreign deployments. CAF does not conduct IA in Canada.”¹⁷¹

¹⁶⁸ "Definition of "Audience" from Termium, Record 3," last modified 4 December, 2013, accessed 2 May, 2021, https://www.btb.termiumplus.gc.ca/tpv2alpha/alpha-eng.html?lang=eng&i=1&srchtxt=audience&index=alt&codom2nd_wet=1#resultrecs.

¹⁶⁹ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 8

¹⁷⁰ "Definition of "Information Activity" from Termium, Record 1," last modified 13 September, 2019 accessed 2 May, 2021, https://www.btb.termiumplus.gc.ca/tpv2alpha/alpha-eng.html?lang=eng&i=1&srchtxt=information+activity&index=alt&codom2nd_wet=1#resultrecs.

¹⁷¹ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 10

Information Domain: “The activities, infrastructure, people, capabilities and/or equipment that enable military power through the collection of information and the management of information and knowledge.”¹⁷²

Information Environment (IE): “the aggregate of individuals, organizations, and systems that collect, process, disseminate, or act on information. The IE consists of cognitive/psychological, physical, and virtual dimensions and it transcends all echelons, from the strategic to the tactical.”¹⁷³

Information Operations (IO): “the *coordination of actions in the IE and other environments* to create desired effects on the will, understanding, and capabilities of foreign adversaries including individuals or groups, in support of overall objectives by affecting their information, information-based processes and systems, while exploiting and protecting one’s own. This coordination function includes the staff, activities, and the processes used to operate in the IE, as it relates to military operations outside Canada. Where authorized, these types of operations can be against known hostile actors such as Taliban, Daesh and Al-Qaeda in contested operations, or below the threshold of conflict against nations or groups using disinformation, misinformation and other ‘hybrid warfare’ activities to achieve objectives.”¹⁷⁴

¹⁷² "Definition of "Information Activity" from Termium, Record 1," ; "Definition of "Information Domain" from Termium, Record 1," last modified 13 September, 2019, accessed 2 May, 2021, https://www.btb.termiumplus.gc.ca/tpv2alpha/alpha-eng.html?lang=eng&i=1&srchtxt=information+domain&index=alt&codom2nd_wet=1#resultrecs.

¹⁷³ Government of Canada, *CDS/DM Planning Guidance - Enhancing Operational and Institutional Communications: Resetting Information - Related Capability Initiatives*, 8

¹⁷⁴ *Ibid.*, 9

Information Related Capabilities (IRC): “the means by which an effect on the IE can be generated. While any manoeuvre element, conventional unit or CAF member can be employed to deliver informational effects, IRCs are generally taken to be capabilities whose key function rests on performing operational functions in the information domain. IRCs include, but are not limited to, PA, civil-military cooperation (CIMIC), engagements, electronic warfare (EW), psychological operations (PSYOPS), cyber, special capabilities (SPECAP), operational security (OPSEC), and military deception (MILDEC). Key to note is that, although various force elements might be designated as IRCs, there is no hierarchical relationship implied amongst these capabilities, which are generated and stewarded by various DND and CAF entities. Rather, they can be brought together through the coordinating function of IO to create an effect in the IE. Specific IRCs, such as offensive EW, offensive cyber, PSYOPS, and MILDEC are not intended for domestic operations and activities. PA, on the other hand, is one of the IRCs responsible to assist with the defence of Canadians against disinformation.”¹⁷⁵

Public Affairs (PA): “encompasses activities related to informing internal and external audiences. It is the function of communicating with Canadians, allies, and in-theatre audiences in a way that directly contributes to enhancing the understanding and trust among citizens and other key groups. ADM(PA) is the functional authority for PA, and plays a key role in ensuring PA activities are coordinated and aligned with DND/CAF and GC objectives. The PA process includes research and environmental analysis, communications advice and planning, and the delivery of informational programs. PA is

¹⁷⁵ *Ibid.*, 9-10

the sole information capability use to communicate domestically on defence matters. It is also the lead function when communicating with domestic and allied audiences involving domestic operations, training, and overseas operations. In addition, PA communicates to in-theatre audiences during overseas operations, which are coordinated as part of overall IO efforts. PA is a command responsibility, and PA assets are distributed across DND/CAF.”¹⁷⁶

¹⁷⁶ *Ibid.*, 10-11

ANNEX B: ACRONYMS

ADM: Assistant Deputy Minister

ADM(PA): Assistant Deputy Minister Public Affairs

ADM(Pol): Assistant Deputy Minister Policy

AJP: Allied Joint Publication

BPAOC: Basic Public Affairs Officer Course

CAF: Canadian Armed Forces

CDS: Chief of the Defence Staff

CFJP: Canadian Forces Joint Publication

CIMIC: Civil – Military Cooperation

CIPR: Chartered Institute of Public Relations

CJOC: Canadian Joint Operations Centre

CONOP: Concept of Operations

DAOD: Department Administrative Orders and Directives

DM: Deputy Minister

DND: Department of National Defence

EW: Electronic Warfare

GC: Government of Canada

IA: Influence Activities

IE: Information Environment

IO: Information Operations

IPA : Institute for Propaganda Analysis

IRC: Information Related Capabilities

Joint Command and Staff Programme (JCSP)

MND: Minister of National Defence

OPLAN: Operations Plan

OPP: Operational Planning Process

PA: Public Affairs

PACP: Public Affairs Coordination and Planning

PAO: Public Affairs Officer

PiT: Precision information Team

POR: Public Opinion Research

PR: Public Relations

PRSA: Public Relations Society of America

PSYOPS: Psychological Operations

PSYWAR: Psychological Warfare

SCL: Strategic Communication Laboratories

SJS: Strategic Joint Staff

SSE: Strong, Secure Engaged: Canada's Defence Policy

StratCom: Strategic Communication

US: United States

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