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Measuring Regular and Reserve Force Integration in the Canadian Armed Forces¹

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Research Report

Nested within our Defence Policy is the foundation for implementing “fundamental change” for Canada’s Reserve Force, to best support the ability for the Canadian Armed Forces (CAF) to deliver on future capability needs. This fundamental change will be through an even-greater integration of the whole of reserve capacity into both ongoing Force Development and Design efforts and future Force Posture and Readiness directives, while ensuring the overarching premise of remaining in reserve until needed.

Chief of Defence Staff²

Introduction

Over the last 400 years, the Reserves have played a significant role in meeting Canada’s security needs. Deployments included domestic and international operations, but most notably, the value of the Reserves was demonstrated during the two world wars of the 20th century. More recently, the Reserves have contributed upwards of 20 percent of staffing requirements for CF operational deployments. In fact, Army Reservists now form dedicated sub-sub-unit organizations for current operations. It is safe to say that in today’s security environment, the Government of Canada (GoC) have come to rely more heavily on the Reserves as an integral component of the Canadian Armed Forces (CAF). Indeed, as noted by the former Chief of Defence Staff, General Vance, the “...[Primary Reserve (P Res)] is a critical component of the CAF’s ability to contribute to my priority of delivering excellence across the full spectrum of operations with capabilities which include, but are not limited to, Force Protection, Arctic Response, Search and Rescue, CBRNE, Health Services, Special Forces, Influence Activities and Public Duties.”³ This renewed emphasis remains today. It has been stressed in the 2017 defence policy in recognizing that “...Canada’s defence needs, now and into the future, will rely upon a Reserve Force that can generate full-time capability through part-time service.”⁴ Canada’s 2024 Defence Policy Update, “Our North, Strong and Free: A Renewed Vision for Canada’s Defence,” further highlights that there is a need for a healthy, strong and integrated reserve “that provide depth at tactical, operational, and strategic levels.”⁵

The renewed emphasis concerning integrating the Reserve and Regular Forces articulated above occurs amid a period where the international environment is marked by considerable uncertainty, volatility and increasingly rapid change. Old familiar “rules of the road” have faded, new ones are beginning to emerge, and events are accelerating. Attempts to understand and, if possible, anticipate future challenges are essential for effective security planning. Indeed, many organizations often get caught in the trap of attempting to diminish uncertainty rather than learning how to function with it. As acclaimed historian Colin Grey points out:

The challenge is to cope with uncertainty, not try and diminish it. That cannot be achieved readily. Such ill-fated attempts will place us on the road to ruin through the creation of unsound expectations.⁶

If the future cannot be predicted and uncertainty rules, how does the CAF plan and execute a renewed emphasis on Reserve-Regular Force integration? A great deal of information exists that can guide understanding the future; however, making sense of that information is often difficult. In particular, several trends reveal essential aspects about our future. For example, we know that in the near future, the CAF will be comprised of multi-generational

groupings, each with a distinct culture and set of values; an aging population coupled with lower fertility rates in Canada will conspire to create an unprecedented demographic situation, one that is increasingly sustained through immigration; and urbanization, already well advanced within Canada with more than 81 percent of Canadians living in urbanized areas, will present recruitment and retention challenges. If the CAF is to make meaningful and lasting change and retain its legitimacy with Canadian society, it must consider the trends mentioned above and several others that will directly and indirectly impact the fabric of the Reserve Force and integration efforts with the wider Defence Team.

Fundamentally, the renewed emphasis on enhancing Regular-Reserve integration is about organizational change. Change can be viewed as both a condition and a process. As a condition, change describes what is happening to our environment; it is external, and the CAF can do very little to impact this change (referred to as inbound change). As a process, change describes the leadership and managerial actions taken to transform our organizations; it is internal, and the CAF can drive this change (referred to as outbound change). Change as a condition is part of the reality we must accept; change as a process is ours to influence. Viewing the enhanced Regular-Reserve force integration effort through a process change lens provides many advantages in anchoring and sustaining organizational integration efforts. Even further, new approaches, such as viewing reservists as transmigrants⁷; that is, those CAF members that constantly travel between civilian and military spheres, may allow us to understand the nature and character of Reservists better, thereby contributing to sustainable integration. As such, the purpose of this paper is to further the investigation into an enhanced Regular-Reserve force integration model and to rethink how to “integrate more reserves into the total force so they can play a greater role on domestic and international operations.”⁸ This paper will commence with a discussion on the Reserve integration focus in Canadian defence policy. This will be followed by exploring the idea of a cohesive Canadian Defence Team considered foundational to the needs of the twenty-first-century security environment. Research into the definitions of integration that provide a common understanding of what is meant by integration in more precise terms will be detailed in the paper. Of note, integration is not defined within the 2017 Canadian defence policy in spite of being mentioned 35 times, nor is Reserve integration mentioned in our most recent policy update⁹. Next, an investigation into measures of integration (MOI) will be proposed, providing quantitative and qualitative measures to better understand progress towards enhanced integration and how the CAF might sustain this change effort.

Canadian Defence Policy

Integration is a concept that has been introduced previously in the CAF. Indeed, perhaps best popularized by Hellyer’s Reorganization in the 1960s, integration was considered a critical step towards unification. The study of unification and its failings has been the subject of defence policy studies for decades. It has been argued that had Hellyer settled for integration over unification, he would perhaps hold a more favourable place in military history. The *1964 White Paper on Defence* dedicated a complete chapter to “Integrated Forces”¹⁰, laying the groundwork for unification. In particular, the White Paper called for “the integration of the Armed Forces of Canada under a single Chief of Defence Staff and a single Defence Staff. This will be the first step toward a single unified defence force for Canada.”¹¹ Further,

the Militia, Naval and Air Reserves were to retain broadly internal security and national survival roles while integrating facilities to the maximum degree possible in support of the more extensive integration efforts of the CAF.¹² The following White Paper, *Defence in the 70's*, recognized that Reserves could not be considered in isolation from the Regular Force and were subsequently placed under the stewardship of the appropriate functional commands. The role of the Reserves was to support the Regular Force.¹³

The 1987 White Paper, *Challenge and Commitment*, introduced the “Total Force Concept,” whereby the distinction between regular and reserve personnel would be significantly reduced, and responsibilities would be integrated.¹⁴ The Total Force Concept was retained in the 1994 *White Paper on Defence*, stating, “[t]he [CF] structure is based on a Total Force concept that integrates full- and part-time military personnel to provide multi-purpose, combat-capable armed forces.”¹⁵ This was followed by the 2005 White Paper, which articulated a “fully integrated and unified approach to operations” but did not articulate a greater degree of integration between the Regular Force and the Reserve Force. (Graham 2005, p. 4) Further, in 2008, *Canada First Defence Strategy* identified the need for a fully integrated, flexible, multi-role, and combat-capable military, and integrating a motivated and effective Defence team comprising Regulars, Reserves and civilians.¹⁶ Lastly, in 2017, *Strong Secure and Engaged* (SSE) called for the Reserve Force to receive new operational roles and integrate into the total force.¹⁷ More specifically, SSE postulates that fundamental changes are necessary for the Reserve Force to meet its full operational potential, ensuring that reservists are a well-integrated component of the total force.¹⁸

Canada’s 2024 Defence Policy Update, “Our North, Strong and Free: A Renewed Vision for Canada’s Defence,” makes little mention of Canada’s Reserve Forces but highlights that there is a need for a healthy, strong and integrated reserve “that provide depth at tactical, operational, and strategic levels.”¹⁹ One can argue that while the concept of the cohesive civilian/military Defence Team has been reinforced by recent history and in the twenty-first century by Canada’s involvement in Afghanistan, as well as the DND/CAF revitalization initiatives of that period, the same is not true of the solely military aspects of the CAF. The history of Regular-Reserve integration shows that a military organization that is not unified but constantly striving to solve the divide between Canadian Reserve and Regular Forces, continually implementing institutional change to achieve this seemingly elusive objective. Ongoing defence management issues, including focusing on an integrated personnel policy framework, whose successful resolution is critical to establishing a productive Defence Team.

The Defence Team Concept

The Canadian Defence Team concept is a response to the difficulties of the twenty-first century security environment. It proposes that an integrated civilian-military organizational approach provides the most successful method of dealing with the complex defence dilemmas of today and tomorrow. Defining the meaning of, as well as actualizing, Regular and Reserve integration remains an ongoing Canadian challenge in fulfilling the full capabilities of the Defence Team.

At the same time, the CAF Reserves and its forebearers have contributed substantially to Canadian defence and security requirements for over four centuries. As a result of this history

and an assessment of future needs, Canada's defence policy recognizes and underscores the necessity for enhanced integration between the Reserve and Regular Forces. This idea of integration, in turn, visualizes a Reserve Force that increasingly supports operational outputs by providing full-time capability from part-time service, coupled with integrated policy and program development that supports the emerging role of the Reserve Force. Despite this 2017 direction, the Reserve element remains the least integrated of all the Defence Team components of a unified defence and security approach. Consequently, this policy goal must be achieved to attain the promises implicit in the Defence Team idea.

The idea of the Defence Team has been implicit in Canadian defence activities from the earliest years of European settlement, and this approach evolved in both scope and detail during the centuries that followed.²⁰ Canadian defence policy researcher, retired Major-General (Retired) Daniel Gosselin, provides some detail on the evolution of the modern Canadian Team. He suggests several influential periods led to the changes wrought by Canada's Afghanistan commitment. Most recently, the transformation initiatives of then Chief of Defence Staff General Rick Hillier. These adjustments included re-organizing the National Defence Headquarters, Canadian Armed Forces and Department of National Defence strategic governance, which made the Canadian military more operationally capable and created the modern Defence Team.²¹ Subsumed within all these changes is the counterproductive upheaval that they sometimes produced in the Reserve elements, leaving them less able to contribute to the concept of a total force.²²

This war differed from previous conflicts in one very significant fashion—the national implementation of an integrated governmental approach to military operations from the policy level to strategic through tactical operations or a “whole of government” approach. Afghanistan gave the Defence Team the impetus to focus their efforts and organization in a unified manner.²³

However, despite the unifying effect of the Afghan conflict and the Hillier initiatives upon the Canadian Defence Team, the underlying assumption that the military component of the Defence Team was a holistic organization remained erroneous. Even at the height of the Afghan conflict, organizational tensions still impeded effectiveness, as this observation from a retired senior Army Reservist, Brigadier-General James Camsell, reflects.

I was in training in New Mexico and I volunteered to become an infantryman [with the OMLT], nobody knew I was a reservist, most people did not know I was a reservist. So I remember I was having a coffee with some RCR dudes and they started talking about cartoons. So they call reservists cartoons in the RCR, because you're only there on Saturdays type thing. So I listened to this, and they didn't know who I was and I said 'hey, you realize that I'm a reservist and half this section is Reserve?'

Camsell also recounts several incidents in Kandahar where reservists were not perceived as professionally competent despite stellar performance or received lesser treatment than the Regulars they served alongside, all of which he attributes to their status as reservists. The roots of this organizational friction lie in decades of reserve restructuring.²⁴

Restructuring is an emotive topic in the Canadian Reserve community. This is mainly due to the re-organizations after the Second World War, which contributed to a diminution of Reserve structures and capabilities throughout that time. By the end of the Cold War, this

had developed what could be charitably labelled an “acrimonious” relationship between Canadian Regulars and Reservists. In the late 1980s, the gradual disintegration and eventual implosion of the Soviet Union and Warsaw Pact prompted a national re-examination of Reserve roles and structures. Efforts to integrate the Reserve and Regular elements of the CAF cost-effectively continued in the 1990s. By the beginning of the twenty-first century, the CAF’s transformation and the demands of the Afghanistan war prompted calls for reserve modernization.²⁵

The most recent efforts to create a cohesive Reserve-Regular Force, or “A New Vision for the Reserve Force,” are laid out in Canada’s 2017 defence policy, “Strong, Secure, Engaged,” which focuses on an operationally ready and “integrated” reserve force.

Whether a task or duty is conducted by a Regular or Reserve Force member, the result will be indistinguishable operational excellence. Progress towards this goal is already underway but must be broadened across the military to ensure a truly integrated Canadian Armed Forces that provides effective operational output.²⁶

Simplistically, the “we” and “them” perspective that seems to be at times present in conscious and unconscious bias need to be eliminated. Rather than disparate elements, reserves should be viewed as one joint component in which planning occurs in parallel with their regular counterparts. Although force generation and employment models may differ, creating integrated effects remains the overriding factor. For example, there should be no “Regular Force equipment and Reserve Force equipment” or “Regular Force infrastructure and Reserve Force infrastructure,” but simply CAF equipment and CAF infrastructure with usage integrated into holistic CAF needs.

Policy concerning terms of service, compensation, benefits and administration, and their associated policies - remuneration, access to services/benefits, application of the National Defence Act and Queen’s Regulation and Orders, on top of other applicable policies, directives, or instructions need to be unified for reserve and regular components. “Strong, Secure, Engaged” outlined nine distinct objectives that pertain to the Reserve Force.²⁷ These are a mix of objectives designed to increase operational output as well as addressing policy concerns particular to the Reserve Force. SSE Recommendation 79²⁸ clearly articulates the requirement to “align” compensation and benefits to reduce the gap between Regular and Reserve Force compensation and benefits except where merited. In the intervening seven years since the introduction of SSE 79, there has been no discernable movement to align policy as the CAF, and Chief of Military Personnel in particular, have been beset by other priorities such as the ongoing recruiting and retention crisis since 2020. Admittedly, the alignment of policy is challenging. However, it will remain ever so until the initial steps are taken, which should commence with the intention of not releasing any further CAF personnel policies that are not harmonized from the outset. The well-meaning intent to get to the Reserve component at a later date is rarely actualized as the CAF moves on to the next personnel policy crisis.

Disparity in personnel policy should be the exception, not the rule. Is this an issue? Is the gap in the policy genuinely significant? Is this a tempest in a teapot? Two examples are provided below to bring to light the arbitrary nature of legacy policy. In principle, there should be no difference in how a Regular or Reserve Force member is treated concerning personnel

relocation and movement of their furniture and effects. Relocation of furniture and effects at government expense should be the same for Regular and Reserve Force members. The impact of relocation on Reserve Force members and their family is consistent with the Regular Force, yet the CAF has deemed that compensation should differ between the two. A Regular Force member receives an extra half month of salary to support a cost move. As an example, a Regular Force Major at pay increment five would receive half of \$11,521.00 while a Reserve Force member would receive a flat rate \$1000 by comparison.²⁹ No justifiable logic can support providing thousands of dollars more to one member over another when the variables are equal. Yet it exists.

Not articulated clearly within these objectives is the potential division that is required between the Primary Reserve, which delivers low-level multi-spectrum tactical capability, the Canadian Rangers, who deliver bespoke operational capability about Canada's North, and the Cadet Organizations Administration and Training Service (COATS), inclusive of the Junior Canadian Rangers (JCR) to create a necessary separation with respect to policy coverage. Including COATS and the JCR muddies the equation; the question is whether they should be excluded from the integration dialogue from the outset, as they do not deliver effects on behalf of the CAF. Has the CAF matured to the point where the legacy definitions of Regular and Reserve, and subsets of the Reserve Force, should be redefined along the lines of active duty and non-active duty wherein those on active duty are subject to the same employment conditions (i.e., can be deployed on operations)?

The main barrier to effective Regular-Reserve integration is managing the process by which change will be affected. Efforts must be focused on something other than adjusting the CAF structure by adding people and money. Structural additions or streamlining have failed to create integration in the past. The constant change in these areas has proven counterproductive.

The first step is confronting the ingrained historical legacy of previous attempts to optimize Reserve usage and the biases that have evolved from them. Following that, visualizing the integrated effects required from Regular-Reserve alignment and the terms of service, along with the necessary policy framework to support it, and from that flowing into the structural organization needed to produce integrated activities.

The underlying assumption of the Defence Team is an integration of the military portion of the CAF with the civilians of the DND. This amalgamation is based on the flawed assumption that organizationally, the Reserve and Regular elements of the Canadian military are an effective, unified group. The history of Regular-Reserve integration demonstrates otherwise. It is apparent in the myriad of shifts regarding part- and full-time military force cooperation and integration in Canada during the twentieth and twenty-first centuries. The numerous and constant adjustments to organizations and roles have adversely impacted the Canadian Reserve's elements. Also, and notably in the context of the Defence Team, these continual changes have not permitted any meaningful progress towards a mutually reinforcing concept of Reserve/Regular cooperation. At the same time, consensus exists on the need for Reservists and Regulars to serve with a shared vision and mutually accepted outcomes. The "how" to be attained diverges in detail and methodology depending on

whom is engaged. Clarity on this integration goal, directed by the 2017 “Strong, Secure, Engaged” and assumed by the 2024 “Our North Strong and Free,” needs to be attained.

Defining Integration

Across the contemporary defence policy landscape discussed above, integration, although never explicitly defined, has been routinely linked to greater efficiencies in defence administration and/or increased effectiveness in operations. While this relationship seems entirely intuitive, little if any, research explicitly links increased integration to quantifiable administrative efficiency or operational effectiveness. Indeed, the problem may exist because integration has never been fully defined within the context of the Regular-Reserve force. The most recent defence policy highlights increased integration for greater operational output, yet the parameters of such enhanced integration need to be improved. As such, one of the first parameters that must be addressed is the definition of integration.

The Defence Terminology Board defines integration as “[s]aid of activities, operations and organizations in which military and non-military elements combine to achieve a common goal through coordinated and complementary efforts.”³⁰ Regrettably, this definition is deficient for this study as it addresses the military as a singular entity and part of external integration beyond the CAF. However, this paper focuses on internal integration within the CAF, that is, between the Regular and Reserve forces.

A literature review³¹ concerning organizational integration provided a means to understand CAF efforts with Regular-Reserve force integration better. Initial research revealed three key issues:

- Integration is occurring at unprecedented levels due to advances in informational technologies and heightened competition (private sector),
- Increasing integration requires significant implementation efforts and resources, and
- Integration is diversely understood and defined across domains primarily because different disciplines have focused on other organizational activities and components.³²

Further, several definitions of integration were available within the research literature, reflecting various views based on differing organizational activities and components. However, one definition emerged which best represented the Chief of Reserve and Employer Support (CRES) view of integration and the purposes of this study:

*...the extent to which distinct and interdependent organizational components constitute a unified whole.*³³

Within this definition, “component” refers to organizational units, departments, or partners and includes business processes, people and technology.³⁴

It is also worth noting that Regular-Reserve force integration is articulated in the context of the total force. Indeed, as stated within SSE:

To maximize the operational output of the Canadian Armed Forces, Reservists will be further integrated into the total force. This includes providing more opportunities for Regular and Reserve Force members to

*train and operate together in Her Majesty's Canadian Ships, Battle Groups, Wings and deployed Joint Task Forces, in Canada and around the globe.*³⁵

As with integration, a total force concept is not new to the CAF and was vital to the 1994 *White Paper on Defence*. Total force is not defined within SSE but is defined within the defence terminology bank Termium Plus:

*A force composed of members of both the Regular and the Reserve Force who are serving together in the same units or other elements, in such numbers as directed by the Chief of Defence Staff, with each member of each such unit or other element retaining his or her distinctive terms and conditions of service.*³⁶

Interestingly, integration is not used within this definition, settling for an arguably lesser commitment with "...serving together in the same units or other elements,". As such, as articulated within SSE, the definition of integration should be linked directly with and form a component part of the total force definition to avoid any further confusion about the aims and understanding of Regular - Reserve Force integration. With a definition of integration now established for this paper and encompassed within the total force concept, the remainder will address the development of MOI.

Measuring Integration

As articulated above, there is a belief that Regular and Reserve forces are already integrated and that varying degrees of enhancing integration have been ongoing in the CAF, albeit at different rates, in the various environments. SSE pronounces that the CAF has "...taken great strides in recent years to improve the overall integration of Canada's military capabilities, as well as the interaction with other government departments, to ensure the security and defence of Canada."³⁷ Further, the CAF website states that the Primary Reserve "...is fully integrated into the CAF Chain of Command."³⁸ In addition, it recognizes that the degree of integration varies by environment and is controlled by environmental Force Generators (Navy, Army, Air Force, Health Services, Judge Advocate General and Special Operations Forces). However, it is argued that these pronouncements may reflect an overly optimistic assessment of the current state of integration. Indeed, there have been no efforts to measure the level of integration across environments, nor have measures been developed to support the integration claims articulated above. This paper seeks to identify these measures as a longer-term, coherent, Regular-Reserve integration strategy for the CAF.

Current research into this integration question reveals that a spectrum of integration may best represent the current and perhaps future integration efforts (see Figure 1). Here, integration is not viewed as a binary choice; instead, it is hypothesized that it occurs at varying levels across the CAF as represented by a spectrum: multi, blended, associate, and full.³⁹ The following typology represents proposed descriptions of the four broad categories of integration:

- **Multi** - Res and Reg force units remain distinct entities with separate operational and administrative chains of command;

- **Blended** - Res and Reg force units remain distinct entities with distinct capabilities and administrative support integrated under one chain of command;
- **Associate** - Reg force units contain Res force components with distinct capabilities and administrative support integrated as one full-time unit; and,
- **Full** - Res and Reg force personnel belong to one unit with one distinct operational and administrative chain of command.



Figure 1: The Integration Spectrum

According to the research literature, organizational integration provides several benefits: increased capacity, improved strategic planning, swifter and more coordinated response to crises, and improved outcomes.⁴⁰ Arguably, the current CAF view of integration remains more or less based on the status quo; that is, Reserve force personnel are used to augment the Regular force. This augmentation is undertaken at individual levels, although sub-subunits have been employed, and the Army, through their Strengthening the Army Reserve (StAR) program, has developed mission tasks for specific capabilities for select Army Reserve units, e.g., Light mortar. Anecdotally, it has been suggested that the initial capabilities selected for integration in the Army were ad hoc. Regular Force hesitation remains in accepting Reservists in these roles. Nonetheless, suppose we are to understand further, measure and improve integration to achieve a full-time capability from part-time service, thereby achieving increased outcomes from an administrative or operational perspective. In that case, a bonafide requirement remains to measure the level of integration efforts across the CAF definitively. Thus, the development and use of integration measures would allow the CAF to measure the current state of integration and chart progress toward more effective and efficient integration levels, thereby improving operational output.

Integration is a challenging task. It takes time to implement, and its forms continually evolve in response to emergent technologies, funding mechanisms, and governance models. It is also essential to understand that integration challenges remain. Initial research discovered three basic levels:

- Structural: represented by administrative boundaries, different rules and regulations, different budgets and financial streams, and different information systems and databases,
- Professional and organizational: represented by different values and interests, differences in the commitment of the individuals and the organizations involved, and

- Cultural and values: differences in culture and values are between Reserve and Regular Force personnel.⁴¹

At the same time, it is more important to note that change management literature recognizes well that these integration challenges can be overcome through strong leadership, a clear purpose, and continuous improvement.⁴² As such, explicit support for enhancing integration must be achieved from strategic to tactical levels. This support must be institutionalized and viewed as an improved operating model, achieving more excellent operational outcomes by leveraging both Regular and Reserve capabilities.

As articulated in the SSE, achieving a full-time capability from part-time service implies a future state of integration. But what is the desirable level of integration and the path to reach that level? Is full integration or some variation along the spectrum depicted in Figure 1 the desired end state? What exactly is meant by the phrase “full-time capability from part-time service”? There remains little discussion or evidence on what is meant by this phrase.

As previously stated, the respective environments have different views of integration and how it should be enhanced. From a more rigorous approach in the Canadian Army (CA) through the Strengthening the Army Reserve (StAR) program to the return to an individual augmentation approach in the Royal Canadian Navy (RCN) to the near fully integrated status in the Royal Canadian Air Force (RCAF), the CAF does not have a singular view of integration. Does maintaining multiple models best represent the needs of the CAF, that is, does the status quo best meet readiness⁴³, increased efficiency⁴⁴ and lower cost⁴⁵ objectives, arguably the policy objectives of developing a full-time capability from a part-time service? Organizational and management theory suggests this is only sometimes the case when considering organizational efficiency and effectiveness.⁴⁶ While an end state for enhanced integration has yet to be articulated, the working assumption is that the status quo is unacceptable, and some higher degree of integration is desired. As noted above, this paper aims to suggest better integration measures to define current levels of integration across the CAF, thereby offering a means to chart progress towards a yet-to-be-defined enhanced integrated position within the CAF.

Integration Model - McKinsey 7-S

The academic literature on organizational change and integration is vast. However, one successful integration model that has withstood the test of time is the “McKinsey 7-S” (see Figure 2):

I have always found that the 7-S framework offers a sound approach to combining all essential factors that sustain strong organizations: strategy, systems, structure, skills, style, and staff—all united by shared values. The 7-S framework remains one of the enduring elements of diligent, focused business management.⁴⁷

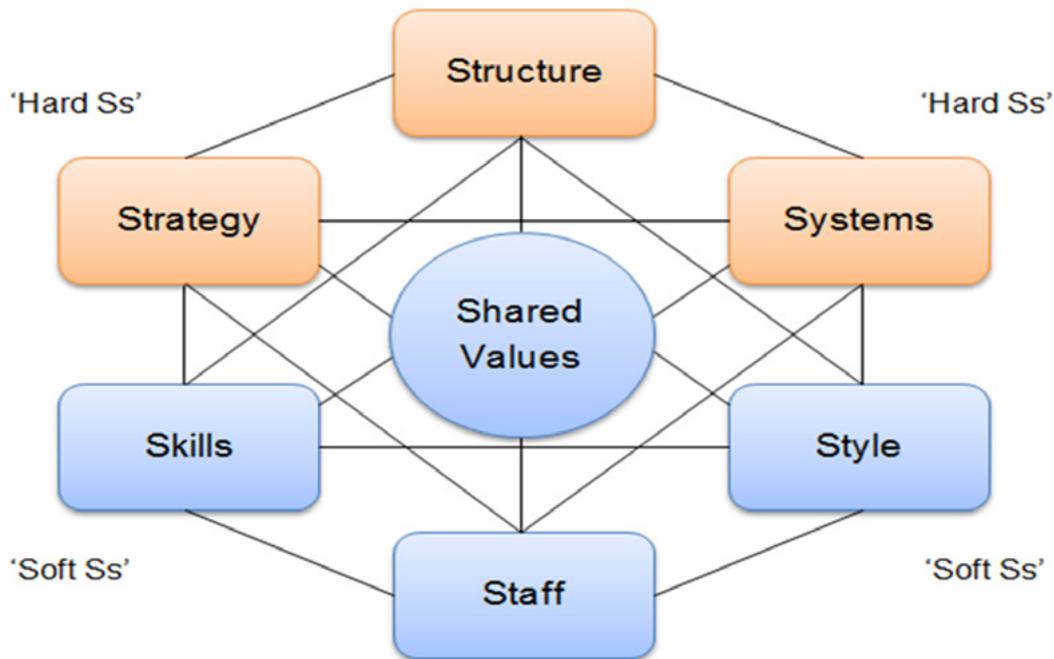


Figure 2: McKinsey 7-S⁴⁸

While the focus of the 7-S framework was initially designed to address structural issues in business organizations, it is now regarded as being more suited to integrating people, operations, strategy, and technology in pursuit of organizational goals; that is, increased operational output through enhanced integration in the case of the CAF.

The 7-S model is underpinned by the premise that an organization is more than its organizational structure.⁴⁹ The organization is theorized to comprise seven interrelated elements (see Figure 2). The seven elements are distinguished as “hard Ss” and “soft Ss.” The “hard Ss” (light-coloured shapes) are tangible and easily identifiable. They can be found in strategy statements, corporate plans, organizational charts and other documentation. However, the four “soft Ss” (dark-coloured circles) are less known and not easily identifiable. They are difficult to describe since corporate culture’s capabilities, values and elements continuously develop and change or may exist “below the horizon” and only be evident within that organization. They are also derived substantially from the people who work in the organization. Therefore, identifying the soft elements’ characteristics is much more challenging. Although the “soft Ss” are not as visible as the “hard Ss,” they have a considerable impact on the “hard Ss” (i.e., Structures, Strategies and Systems) of the organization.⁵⁰

Hard Ss	Soft Ss
<p>Strategy. Actions the CAF plans in response to or anticipating changes in its external environment.</p>	<p>Shared Values. The dominant values, beliefs, and norms that develop over time and become relatively enduring features of organizational life.</p>
<p>Structure. The basis for specialization and coordination is influenced primarily by strategy and by the CAF size and diversity</p>	<p>Style. This reflects what leaders do rather than what they say, how they spend their time and what they focus attention on. Symbolism – the creation and maintenance (or sometimes deconstruction) of meaning is a fundamental responsibility of leaders.</p>
<p>Systems. Formal and informal procedures that support the strategy and structure. (Systems are more powerful than they are given credit for).</p>	<p>Staff. People/human resource management processes are used to select and develop leaders, socialize cadre members, shape the fundamental values of leadership cadre, introduce young recruits to the CAF, and help manage the careers of CAF members.</p>
	<p>Skills. The distinctive competencies – what the CAF does best by expanding or shifting competencies.</p>

Table 1: McKinsey 7-S “Hard” and “Soft Ss”⁵¹

In applying the 7-S, if one element changes, it will affect all the other elements. When looking to achieve higher levels of integration, in effect produce change, this point is critical to understand, but even more so, how to map such change. Typically, organizations will focus on the hard Ss - strategy statements, organizational structure and systems - as they are more easily identifiable and, hence, more easily changed, representing tangible results heralding the success of a particular change initiative. Organizations, the CAF included, typically care less for the soft Ss - skills, staff, style and shared values - as they are difficult to describe due to their dynamic nature and lie beneath the organization’s surface, making them challenging to influence. Historically, the CAF has focussed more on the hard Ss, as evidenced by recent large-scale change initiatives such as the Management Command and Control Re-engineering initiative and CAF Transformation. Several proclaimed successes

were relatively short-lived in these change initiatives, preventing an anchoring of the change in the soft S's.⁵²

The 7-S provides an excellent framework for addressing enhanced integration in developing integration measures. A combination of measures across the hard and soft S categories will enable a structured approach to capture the essence of the current state of integration and, in turn, provide a valuable baseline for future progress, particularly with the soft Ss, which are regarded as the keys to successful change, in our case, enhanced integration. As such, the next section will broadly outline the 7-Ss and identify the integration measures under each category. The aim is to develop a resilient model that can be used and refined as the CAF continues to enhance integration, thereby increasing operational output.⁵³

Integration Measures

In theory, identifying integration indicators sounds simple; however, as one delves into the task, one soon discovers it to be very difficult. Naturally, MOIs are best measured over time; however, the suggested indicators below represent an initial baseline that must be conducted to understand better and enhance integration. It is worth repeating here that, to the author's knowledge, MOIs have never been developed for Regular-Reserve force integration in the CAF. As such, the following list and approach should be regarded as the initial research into the area of MOIs requiring more research and refinement (not an exhaustive list):

Hard S's:

- a. Structure: the organizational and reporting structure of the CAF.
 - Does the CAF have an organizational chart depicting the Regular - Reserve force integrated structure?
 - Does the CAF have a written, defined process for periodically reviewing the integrated structure to ensure consistency with the organization's current strategies?
 - Does the integrated structure of the CAF (Regular and Reserve forces) facilitate the flow of information upwards, downwards and across Regular-Reserve lines?
 - Are the reporting relationships between Regular and Reserve organizations appropriate? Are they institutionalized at the strategic, operational, and tactical levels?
 - Are integrated Regular and Reserve accountabilities clearly defined?
 - Are integrated Regular and Reserve accountabilities effective?
 - Are integrated Regular and Reserve accountabilities communicated and understood by Regular and Reserve force personnel.
- b. Strategy: how things are/or should be done to achieve maximum operational output.
 - Does the CAF have a strategic plan incorporating integrated Regular and Reserve Forces?

- Does that strategic plan include a clear statement of integrated organizational output, providing Regular and Reserve input?
 - Does that integrated plan logically link the Regular and Reserve Forces' activities, outputs and goals?
 - Do Regular and Reserve force personnel feel that integrated strategic objectives apply to them?
 - Do Regular and Reserve units/personnel have integrated terms of reference and performance objectives that align with the strategy?
 - Is integrated organizational risk understood by Regular and Reserve forces?
 - Does the Regular and Reserve staff have access to the integrated strategic plan?
- c. Systems: formal and informal procedures that support the strategy and structure.
- What is the status of the environment? Regular- Reserve unit relations: number of common social, educational, and training events.
 - What is the status of Regular-Reserve Individual Training (IT)? Common professional development and IT training and standards.
 - What is the status of Regular-Reserve collective training (CT)? Common, integrated CT events.
 - What is the status of Regular common training standards and operating procedures?
 - What is the status of Regular-Reserve training resources? Access to common training equipment, weapon systems, maintenance and materiel?
 - What is the status of Reserve capabilities? What are the capabilities (individual and collective), and what is their degree of sustainability within the total force?
 - What is the status of Reserve deployment or employment availability and their responsiveness to training and operational CAF demands?

Soft Ss:

- a. Staff: The people/human resource management processes used to select and develop managers, socialization processes, ways of shaping fundamental values of management cadre, ways of introducing young recruits to the organization, ways of helping to manage employees' careers.
- Do Reserve forces have terms of reference that align with the CAF's values and codes of conduct?
 - How does the recruitment process emphasize the values/code of conduct, and is it articulated similarly for both Regular and Reserve force recruits?

- Do Regular and Reserve force personnel understand their terms of reference and how they interrelate?
 - Are Reserve force personnel evaluations regarded as frank and constructive discussions of performance issues or simply “going through the motions”? How do they compare to the Regular force?
 - Does the Reserve force see the personnel evaluation system as SMART—specific, measurable, achievable, realistic, and time-related?
 - Do Reserve force personnel feel they have an equal chance for promotion based on merit within an integrated force?
 - Is the personnel evaluation process applied equally across the Regular and Reserve forces?
- b. Skills: The distinctive competencies are what the CAF does best and ways of expanding or shifting competencies.
- Are CAF training programs visible and available to the Reserves?
 - Is training aligned between the Regular and Reserve forces, and are the skills and knowledge necessary for operations?
 - Are there multiple training opportunities to fit with the operational requirements of the CAF for the Reserve forces?
 - Are training programs evaluated to ensure equal effectiveness across the Regular and Reserve forces?
 - Are there arrangements in place enabling the sharing of skills and knowledge?
 - Is training aligned with the shared values of the Regular and Reserve forces?
 - Are skills and knowledge managed centrally or separately for Regular and Reserve force personnel?
- c. Style: This reflects what managers do rather than what they say; how they spend their time and what they focus attention on.
- Do formal and informal processes exist for the Reserve force that may raise issues about behaviour?
 - Do Reserve personnel believe that senior leadership take their concerns seriously?
 - Does Reserve leadership receive sufficient and timely information about sensitive issues?
 - Does Reserve leadership foster teamwork and an atmosphere of mutual trust?
 - Do Reserve force personnel believe the Regular force values their knowledge and skills?

- Are training failures or discrepancies, integrated or otherwise, treated as an opportunity for improvement or used to apportion blame?
 - Does senior Reserve leadership foster mutual trust and teamwork with the Regular force?
- d. Shared Values. The dominant values, beliefs, and norms that develop over time and become relatively enduring features of organizational life.
- Have new “integrated” values been drafted and approved, and are the codes of conduct and value statements clear and meaningful for the Reservists? Do they align with the Regular Force?
 - Are new “integrated” values openly communicated and supported by Regular and Reserve force leadership?
 - Do senior Regular and Reserve force leadership exemplify the values and codes of conduct for an integrated force?
 - Are the values and codes of conduct reinforced through stories and rituals that highlight success?
 - Are integrated values built into strategy documents, objectives and decision-making?
 - Do Reservists and Regular force personnel identify with, accept and apply the integrated values and codes of conduct?
 - Are there barriers (real or perceived) to implementing integrated values and code of conduct?

It is worth repeating that the indicators listed above represent a “first look” at how each of the McKinsey 7-S categories may be used as a framework to understand the baseline MOIs better. More detailed research and refinement of the indicators are required to establish an effective process that contributes to an effective measurement instrument. This, in turn, will allow for a rigorous assessment of the “real” level of Regular-Reserve force integration within the CAF to offer recommendations to enhance a future level of improved integration.

Operationalizing the MOI

It is worth repeating that the 7-S framework is regarded as being well suited to integrating people, operations, strategy, and technology in pursuit of organizational goals; that is, in the case of the CAF, increased operational output through enhanced integration of Regular and Reserve Force people, operations, strategy and technology. The 7S indicators provide a valuable and rigorous approach to establishing a baseline measure of Regular-Reserve Force integration. To be clear, using the McKinsey 7S is not a panacea. However, it can represent a powerful starting point for a generally normative desire (aside from StAR and MCDV) to enhance Regular Reserve Force integration, thereby increasing CAF operational output.

An initial attempt to operationalize the MOIs was undertaken with the 2024 Your Say Matters (YSM) survey. In collaboration with Director General Military Personnel Research

and Analysis (DGMPPRA), the MOIs developed from the soft Ss of the McKinsey 7S framework (Staff, Skills, Style and Shared Values) were evaluated and redesigned to fit within the CAF context for the YSM survey. Where components of the MOIs were realistically too challenging to measure directly via a questionnaire, proxy measures were used. A sample of the questions designed for the 2024 YSM survey is contained in the table below:

McKinsey & 7S - Soft Ss	YSM 2024 - Reserve Force – Regular Force Integration and Collaboration
Shared Values. The dominant values, beliefs, and norms develop over time and become relatively enduring features of organizational life.	<ul style="list-style-type: none"> • Reserve and Regular Forces members work together effectively as a team. • The contributions of Reserve Force members are valued by Regular Force members.
Style. This reflects what leaders do rather than what they say, how they spend their time and what they focus attention on. Symbolism – the creation and maintenance (or sometimes deconstruction) of meaning is a fundamental responsibility of leaders.	<ul style="list-style-type: none"> • Senior leaders emphasize the importance of Regular Force-Reserve Force members’ cooperation in the CAF/DND. • Regular and Reserve Forces members have positive working relations with each other in my workplace.
Staff. The people/human resource management – processes used to select and develop leaders, socialization processes, ways of shaping basic values of leadership cadre, ways of introducing young recruits to the CAF, ways of helping to manage the careers of CAF members.	<ul style="list-style-type: none"> • Regular Force managers conduct personnel appraisal of Reserve Force members fairly. • Regular Force managers are able to manage Reserve Force members effectively.
Skills. The distinctive competencies – what The CAF does best by expanding or shifting competencies.	<ul style="list-style-type: none"> • Regular Force managers recognize the skills and expertise of Reserve Force members. • Regular Force managers are often placed in positions of authority over Reserve Force personnel without receiving sufficient training required to manage them.

Table 2: McKinsey 7-S - “Soft Ss” YSM Questions

The analysis of the 2024 YSM Regular-Reserve Force integration questions revealed current perceptions of Reserve and Regular members concerning integration. In brief, while overall results were largely positive, Regular Force members generally responded more favourably

than Primary Reserve Force members, indicating that there may be differences (or a disconnect) in military experiences. The main difference was that Primary Reserve Force members' perceptions of recognition (regarding contributions, skills, and expertise), may contribute to their feelings of being a "second-class citizen".⁵⁴

The results of this study highlight the importance of integration and collaboration between CAF members as it is associated with desirable individual and organizational outcomes. However, it should be understood that this was an "initial" attempt to identify perceptions and views by CAF personnel about Regular-Reserve integration and that additional work across all McKinsey 7S indicators is required to measure and establish a credible Regular-Reserve Force integration baseline.

Future Integration End State

The MOIs identified above and the development of the Soft S indicators for the 2024 YSM survey offer a glimpse at how integration might begin to be measured based on the status quo: Regular Force environments retaining control of force generation and force employment options for Reserve forces. Under this model, enhanced integration can proceed with separate environmental end states and perhaps achieve a full-time capability from a part-time force, arguably meeting the aims of defence policy. However, it is hypothesized that the future security environment will make increasingly diverse and complex demands of the CAF, requiring a fuller integration of the Regular and Reserve Forces to sustain operations. Investigating this future end state is underway through a strategic foresight research framework aimed at developing a deeper understanding of the CAF's future integration needs and a total force concept.

Conclusion

The CAF has had a long association with the integration of the Regular and Reserve forces. Historically, The CAF has called upon the Reserves to augment the Regular force in times of need, the most visible and memorable evidence of that need during the Second World War. However, the operational necessity of the Reserve force has waxed and waned over the last few decades until recently, when they were called upon again to augment and sustain the Regular force in Afghanistan. Today, the nature of the contemporary security environment, coupled with decreasing recruitment and retention of both Regular and Reserve forces and an aging population, has made the Reserves again viewed under a new lens to build and sustain operational capacity in the CAF.

Canada's 2017 defence policy, *Strong, Secure and Engaged*, articulates a new integration vision for the Reserves - enhancing integration of the Regular and Reserve forces by building a full-time capability from part-time forces. CRES reinforced this policy direction through the development of a new vision document, "Enabling Full-Time Capability Through Part-Time Service: A New Vision for The Reserve Force"⁵⁵, to achieve the fundamental change for the Reserve Force outlined in SSE.⁵⁶ While several proclamations regarding enhanced integration have been made in policy and strategic documents, the actual level of integration and required end state for enhanced integration is unknown. Each environment

controls the degree of effort behind enhancing integration, whereby the Canadian Army provided the most apparent manifestation of the Regular-Reserve integration aims of SSE with their StAR program, which was abruptly terminated. At the CAF institutional level, “The Journey” articulated a new approach to human resources for the CAF. Several new initiatives, such as the “Adaptive Career Path,” reflect an improved human resource position for the Reserves, e.g., an increase in pay structure. While these initiatives and programs are most welcomed and reflect a greater emphasis on the Reserve force, it is unclear to what end. Indeed, integration is arguably enhanced, but what was the start point, are the enhancements sustainable, and what is the desired end state?

The start point and end state questions regarding sustainable integration can partly be answered by developing MOIs through the McKinsey 7-S framework. Developing these measures will allow the CAF to understand better where each environment is positioned on the integration spectrum (see Figure 1) and then track progress towards a higher level of integration if the CAF and Reserve Force desire it. While the future integration end state is unknown, it is recommended that research begin on a foresight project to comprehend the future security environment and the demands that may be placed on the CAF and, in turn, the Reserve Force, perhaps signalling a higher or different demand for integration. Time will tell what is required of the CAF and the Reserve Force, but establishing a baseline measure of Regular-Reserve integration now will help better understand our current level of integration and the path to an enhanced and sustainable level of integration, thereby increasing CAF operational output today and tomorrow.

Endnotes

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 - 44 Improved Efficiency: achieve better availability and use of human capital. Foster seamless movement among Regular and Reserve Forces, share professional experience and coaching, balance personnel tempo, and optimize each component’s unique capabilities and strengths. (Thie et al., *Factors to Consider*, 8)
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