

(Trial Document)

MERIT REVIEW BOARDS FOR SELECTION OF CADETS FOR PROMOTION TO THE RANKS OF CP02/MWO/WO2 AND CPO1/CWO/WO1

REFERENCES

- A. CATO 13-02
- B. CATO 15-22

PURPOSE

1. This order amplifies and clarifies the procedure to be used in Prairie Region regarding the conduct of Merit Review Boards for the selection of cadets to be promoted to CPO2/MWO/WO2 and above. It is to be read in conjunction with reference CATO 13-02, with particular attention paid to Annex B of reference.
2. The aim of the Merit Review Board process is to:
 - a. establish an equitable and transparent process, able to withstand scrutiny, by which Commanding Officers (Cos) can establish the most suitable cadet(s) for promotion to the ranks of CP02/MWO/WO2 and CPO1/CWO/WO1;
 - b. establish a prioritized pool of eligible cadets for future promotion;
 - c. identify specific individual deficiencies, so that unsuccessful cadets can be briefed and provided with remedial training opportunities, thereby affording them the opportunity to improve to a standard at which they satisfy expectations and might *become* eligible for promotion; and
 - d. establish a common standard and process across units of all elements throughout Prairie Region.

CONCEPT

3. At the outset of each Training Year (TY) (Sep/Oct), a review must be conducted to identify actual and forecast rank vacancies as well as a list of cadets who are, or will become, eligible for promotion. This review must include the examination of the unit quota (to determine number of authorized positions at each rank), the verification of attendance (to determine number of returning effective cadets in each rank), the review of cadet files (to determine if/when any cadets will age out prior to end of training year), the review of cadet Personal Goals Maps for the TY, or the conduct of brief start-of-year interviews (to determine cadet goals and identify cadets who may be leaving the unit mid-year).
4. This review will identify whether there is an immediate or forecast requirement to conduct Merit review boards that year. Periodic reviews may be necessary from time to time during the course of the year, as unforeseen vacancies may occur; but the intent is that an accurate forecast be developed from the outset. This will reduce the number of boards

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required, and permit scheduling the board(s) to occur prior to the actual requirement, so that a cadet need not wait unnecessarily for promotion. There is no reason a board cannot be conducted prior to a cadet satisfying time-in-rank requirements so that the cadet may be promoted once the criteria are met, and a vacancy exists.

BOARD COMPOSITION

5. The Merit Review Board shall consist of the following members:
 - a. Chairperson. In an effort to ensure fairness and impartiality, COs are encouraged to delegate the responsibility of the Merit Review Board Chairperson to another unit officer;
 - b. a representative of the respective Navy/Army/Air Cadet League (provincial division/committee, or local branch/sponsor/support committee [may include affiliated unit]); and
 - c. a neutral third party (usually the ACO/ACICO but could be RCSU/CSTC rep, or officer from different unit staff).
6. Any potential perception of conflict of interest must be avoided; therefore, any person who has any personal relationship with any of the cadets under consideration must excuse themselves, and another representative take the place. To ensure fairness, the composition of the board must be consistent for all candidates.

ADVANCED PREPARATION

7. There are several tasks that must be performed in advance of conducting the Merit Review Board:
 - a. unit CO must make it known, by informing potential candidates and noting in the Routine Orders, that a Merit Review Board will be conducted;
 - b. unit must conduct initial file review to identify cadets eligible for promotion/participation in the Merit Review Board process. IAW CATO 13-02, cadets must:
 - (1) have successfully completed Phase IV/Gold Star/Level 4 training;
 - (2) have satisfied the 'enhanced proficiency' requirement (PO1 PC/NSCE);
 - (3) have completed six-months in the required substantive rank by the promotion date. (NOTE: if there is a shortage of cadets at the required rank level, which affects the functioning of the unit, a cadet may be considered when missing the required time in rank, if found suitable by the board, and may be eligible for **acting** promotion to the next rank.); and

- (4) not be subject to any current restriction or suspension of promotion eligibility or cadet membership, pursuant to CATO 15-22, Conduct and Discipline of Cadets (Reference B);
- c. while the onus is on the staff of each unit to identify all eligible cadets, any cadet who believes he/she is eligible may request consideration. The unit staff and cadet making application must share information and documents each holds and collaborate to determine eligibility. Following the examination of a cadet request, and in the interest of fairness, where there is doubt, the file shall be referred to the Merit Review Board to ensure no potential candidate is excluded from a fair assessment. Substantiation must be provided any time a cadet is not considered for review and interview;
 - d. eligible cadets shall be provided a copy of their Fortress Cadet Information Sheet for verification;
 - e. eligible cadets shall review their Fortress Cadet Information Sheet for accuracy and completeness, and where applicable, provide updates and/or corrections, along with substantiating documents, to the unit staff;
 - f. unit staff shall update Fortress and provide cadet(s) with a corrected copy of their Fortress Cadet Information Sheet, that shows changes were made;
 - g. the current year's list of interview questions (one set of questions to be asked of CPO2, MWO, WO2 candidates and a different set of questions to be asked of CPO1, CWO WO1 candidates), may be determined by the unit CO in consultation with the unit Staff, but must adhere to the categories outlined in Para 13 a through f.
 - h. the Merit Review Board Evaluation form, along with a scoring rubric, has been developed both for the detailed file review and interview (see Annex A to this order); and
 - i. a time and location to conduct the board is to be determined, ensuring the area will afford sufficient space and privacy, and that the time allotted will allow participation by all eligible cadets (generally 30 minutes for each candidate), and that such particulars are advertised well in advance. (NOTE: For cases where only a file review is required, the board may be conducted by conference call.)

MERIT REVIEW BOARD – PART ONE: DETAILED FILE REVIEW

8. A detailed file review is critical to the board process as it provides the opportunity to assess the cadets on their qualifications and achievements. This review may be conducted immediately prior to the interviews, or may be conducted in advance of scheduling any interviews; however, both the file review and interview shall consist of the same Merit Review Board members. The board members may review the files independently, or at different times/locations, but must have the opportunity to discuss their assessments with each other. The discussion is necessary to ensure that nothing was overlooked and that the same

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criterion was followed by all.

9. Each file must be reviewed and scored based on the Merit Review Board Evaluation form, along with a scoring rubric, found at Annex A to this order. Items that will be assessed include:

- a. attendance;
- b. academic review of unit training;
- c. Cadet Summer Training Centre (CSTC) or other training venue (cadet or civilian) course reports, if any;
- d. pertinent positive and/or disciplinary notes kept on file (including letters of recommendation), if any;
- e. unit awards, if any;
- f. regional and national honours and awards;
- g. qualifications; and
- h. participation in Regionally Directed Activities.

MERIT REVIEW BOARD – PART TWO: INTERVIEW

10. An interview is mandatory for all promotions to CPO2/MWO/WO2, regardless of the number of vacancies or the number of eligible candidates.

11. In an effort to ensure fairness and impartiality, the Merit Review Board process is encouraged for all promotions to CPO1/CWO/WO. When there are multiple candidates, or when there may be a perception of bias, for example, because of a personal relationship between a cadet and a staff member, the Merit Review Board process is mandatory. When in doubt, an interview must be conducted. Interview questions for a CPO1/CWO/WO1 Merit Review Board should be different than for a CPO2/MWO/WO2 Merit Review Board.

12. To ensure fairness, each cadet to be interviewed must have as similar an experience as possible. To this end, each cadet must be given the same initial instructions, and face the same questions. Depending on the responses received from the cadet, board members may wish to ask specific, unique follow-up questions to clarify a response, but such questions should not direct or lead the cadet to a specific desired response. In the event that a cadet is struggling with a question, board members may ask follow-up questions to prompt a response, but scores for any elicited response must be suitably offset in relation to the amount of prompting required. In the event that any matter of concern is identified during the detailed file review, an individual cadet may be asked to comment on the finding, and based on the cadet's response, the board may update/revise that cadet's score.

13. Each cadet being interviewed must be scored based on the Merit Review Board Evaluation form and scoring rubric found at Annex A to this order. Items that will be assessed during the interview include:

- a. the cadet's attitude and preparedness for the interview in regard to their standard of dress and deportment;
- b. the cadet's ability to respond to general knowledge questions;
- c. the cadet's ability to respond to administrative knowledge questions;
- d. the cadet's ability to respond to leadership knowledge questions;
- e. the cadet's ability to respond to scenario based questions; and
- f. the cadet's ability to respond to all questions to do with the experience and ability required to assume and contribute to the duties and responsibilities of the next rank/appointment.

BOARD DELIBERATIONS

14. Once all eligible cadet files have been reviewed and interviews conducted (where required), and each board member has scored and ranked each cadet according to the Merit Review Board Evaluation and scoring , all members of the board shall discuss their individual rankings to determine a collective assessment.

15. An appropriate balance shall be struck between recognizing past achievement/merit, future potential and ability to contribute in the next rank/appointment.

16. Ideally, through deliberation, the board will achieve consensus; however, this is not absolutely required. The role of the board is ultimately to ensure that the procedures and protocols are followed, and that all cadets are treated fairly and equitably through the process. In an effort to ensure that procedures were followed and cadets treated fairly, a detailed record of deliberations must be maintained in an appropriate administration file at the cadet unit, for reference and/or to answer protest if necessary. This document will also serve as reference during recommended debrief sessions with candidates.

17. If the CO is not a member of the Merit Review Board, the CO must be fully briefed on the majority view, as well as any dissenting position(s) of the board.

PROMOTION AUTHORITY

18. The final authority for cadet promotion rests with the unit CO.

19. The applicable ACO must be advised a minimum of two-weeks in advance of any promotions to CPO2/MWO/WO2 and above.

20. If a unit CO intends to make any promotions not in keeping with the recommendation of the Merit Review Board, the matter shall be discussed with the applicable ACO beforehand. This requirement is not intended to undermine the authority of the CO, but to protect the CO by ensuring that final decisions are ethical and will withstand scrutiny should a cadet, parent or other individual file a complaint. Final decisions rest with the unit CO, who remains accountable through the chain of command for all such decisions.

21. Where a cadet has gone through the Merit Review Board process and has not been selected for a promotion, he/she shall be interviewed and informed of areas of weakness (if any) and how he/she could improve in order to compete more strongly if/when the opportunity for promotion arises again. This shall be done in a timely manner so as to be meaningful to the further development of the cadet.

OPI: ACO (Air) - Calgary

ANNEX A. Regional Cadet Support Unit (Prairie) Merit Review Board Evaluation