Partnership Grants Midterm Report

File number:	895-2019-1000
Host institution:	Carleton University
Project director:	Stephen M. Saideman
Project title:	Canadian Defence and Security Network

The Midterm Report should provide an overall view of what the partnership has accomplished by the midpoint of the award, and provide sufficient information to allow the Midterm Review Committee to assess the progress of activities undertaken during this time. It is both a description of the activities and accomplishments to date, and a forward-looking document that confirms and updates the plan of activities designed to ensure the achievement of the stated goals and objectives of the partnership. It is expected that key members of the partnership will participate in the preparation of the report's contents and endorse it prior to submission.

Instructions: Please submit your report in a Word format. Provide information about your project for each of the seven evaluation criteria listed below. For each of the green text boxes below, provide the information requested while limiting your responses to 500 words. If you choose to include any charts, tables, graphics, diagrams, images, etc., include these as a separate appendix document. In total, keep the appendices to a maximum of twenty pages. Do not enter text in the blue text boxes. The midterm review committee will assess your progress (i.e., exceeds expectations; meets expectations; may not meet expectations, clarification required; does not meet expectations) and provide feedback in the blue text boxes.

Progress Summary

Provide a plain-language summary of the results of your project to date.

Project Response:

The goals of the Canadian Defence and Security Network [CDSN] partnership effort have been to build connections between the disparate parts of the defence and security community, share the various perspectives of the different sub-communities, generate and amplify research, and foster a more inclusive, diverse, and equitable next generation of defence scholars, scientists, policy makers, and military officers as well as those in the private sector who work in these areas.

Despite the challenges posed by the COVID-19 pandemic, the CDSN has been able to lead discussions in Canada both on those issues anticipated in our original grant and on responding to the pandemic. Four of our five research themes have produced important research, much of it co-produced by and of use to the policy community, generating publications aimed at academic and non-academic audiences.

The CDSN has been a major facilitator of and participant in defence and security conversations in Canada. Not only have the Chief of the Defence Staff and the Deputy Minister been on our Battle Rhythm podcast with some of the most candid responses to the sexual misconduct/abuse of power scandal, but we had the new Minister

Project Response:

of National Defence as well, discussing the challenges she has faced. Our annual Year Ahead Conference has been an important pathway for academics to communicate their research findings and their policy assessments directly to the policy community. Our Summer Institute (which has been challenged by the pandemic—cancelled, then online in the second attempt, and finally in-person in our third effort) has successfully bridged the different communities and fostered the professional development of a diverse group of emerging scholars, junior policy officers, and junior individuals from the private sector. Our Capstone Seminar has amplified the work of our partners and especially of a diverse group of emerging defence scholars and scientists. Our surveys have provided much clarity about where Canadians stand on defence and security issues.

As Canada's comprehensive defence and security network, we were well situated when the pandemic struck, quickly organizing a Pandemic Response conference online, soliciting policy questions from the Department of National Defence and the Canadian Armed Forces, holding the online session, and providing the government with ideas for some of the challenges they were facing. DND took our model and adapted to its own network program.

We are quite proud of our ability to work through the pandemic, adding new partners, and helping the existing ones fulfill their mandates, and connecting with the Canadian public and government via multiple pathways. We are happy to share these results in this report and will use your feedback to ensure that we do even better in the second half of our grant term.

1) Research and/or related activities are proceeding and evolving as planned or, if not, the partnership has overcome challenges and adjusted plans appropriately and effectively to keep the project on track.

With respect to the project's research and/or research-related activities, explain your accomplishments to date and the extent to which your project is meeting the measures of success as outlined in your application and/or Milestone Report. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvement related to research activities, describe how this feedback has been addressed. If you have experienced challenges, describe them and how they have been addressed. If you have significantly adjusted your plans, explain and justify these changes. Finally, briefly outline your plans moving forward and describe how they will allow you to meet the goals and objectives of your project.

Project Response:

We have pursued research in four of our five planned areas: military personnel, security, operations, and civil-military relations. We did not complete the fifth research agenda—procurement (explained below). The **Operations** theme was focused especially on NORAD modernization, the new NATO strategy, and Arctic security. This team completed manuscripts for two peer-reviewed books dedicated to NORAD and The Legacy of 9/11 to be published by McGill-Queen's University press in 2022 and 2023 respectively. Testimony was provided to the Standing House of Commons committee on National Defence and the very successful and popular NATO Field School was in person for 2022.

The **Military Personnel** team established itself as having some of most important experts on these issues at a time where a scandal rocked the Canadian Armed Forces. This produced many opportunities for its members to engage the government and the public. The team did not need to pivot as it was already working in issues that became the focus of Parliament, the media, and the government. Its leadership was regularly consulted by the new Minister of National Defence, the retired Supreme Court Justice reviewing the military, and the new command that was set up to address these problems. In its research, the personnel theme focused on military organizational culture, recruitment and retention, and workforce diversity. The personnel theme hosted 3 international workshops with the participation of academic scholars and researchers from defence

Project Response:

establishments, policy and practitioner stakeholders, and students. A special issue on the topic of military diversity was published in the Journal of Military, Veteran and Family Health, and a manuscript for a peer-reviewed book examining Total Defence Force personnel integration was submitted to McGill-Queen's University press for publication in 2023.

Our **Security** theme group has taken seriously the many ways Canadians feel threatened and whether the government fosters security and insecurity in its efforts at home and abroad. Co-directors co-edited an important text, Canada Defence Policy in Theory and Practice, as well as two peer-reviewed books focusing on NATO Burden-sharing and on high risk-offending that demonstrate the range of what Security means. One of the theme leaders testified to the Standing House of Commons committee on National Defence.

The **Civil-Military** theme focuses on research analyzing civil-military relations in Canada by examining the role of public opinion, news media, and social media on Canadian defence affairs. In the last three years, we organized 3 workshops to 1) design a survey on Canadians' knowledge and attitudes about defence and security issues (2020); 2) a research method workshop on applied machine learning text analysis for news media (2021); and a workshop on the future on defence policy with a focus on domestic operations and strategic communications (2022). We also organized a workshop in Paris (2021) and working meetings at NATO headquarters in Brussels on Canadian defence policy. We designed 2 population surveys on 1) defence policy preferences (2020); 2) disinformation (forthcoming) and 2 survey experiments on 1) defence spending (2021); 2) and diversity and inclusion in the Canadian Armed Forces (forthcoming). We edited and published a special issue of the journal Canadian Studies (in French).

We decided to re-allocate our resources away from the **procurement** theme. Our director in this area, Philippe Lagassé, was involved with the government via the Independent Review Panel. We thought this would be advantageous, as he would get much insight into the procurement processes. However, this involvement limited what he could say or do in public, which also impeded his ability to organize research workshops. As we assessed that much of this area was covered thoroughly by various think tanks, we chose to re-define some of this work as fitting better in our civil-military relations theme.

As the tables indicate, we more than matched most of our targets. We produced more edited volumes and books than we expected, and we underestimated how many policy reports and briefs we would produce. Appendix 1 lists the research outputs by category. A key part of our effort has been the co-production of knowledge. With DND employees as co-directors of our Personnel and Security themes, this has worked out well. They have not only taken part in the planning of the workshops and the execution of the research, but in directly conveying the research back to our partners. The pandemic has affected how we do our research efforts, with our workshops mostly moving online and some getting pushed back. However, the partnerships we have built facilitated the research even in these challenging times so that we were able to zoom our way through the pandemic, meeting with co-authors and other collaborators. The pandemic affected us in another way—it caused us to realize that we had focused more on the D in our name than the S. That is, three of our four (or five) original research themes were focused mostly on defence issues—how the Canadian military operates, recruits and treats its personnel, and how the government and the public relate to it. With more Canadians being harmed by a disease than by foreign wars, we sought additional funding to develop new research agendas. Our successful application for a DND MINDS Collaborative Grant will fund research on climate security, global health challenges, supply chain vulnerabilities, and domestic emergency operations. While this new research will be funded by a non-PG source, the Partnership Grant has provided the structure for including the new partners and themes and is funding the infrastructure and dissemination processes that will facilitate the research and its amplification.

Midterm Review Committee Feedback:	Choose a descriptor.
Click here to enter text.	

2) Knowledge mobilization activities are proceeding and evolving as planned or, if not, the partnership has overcome challenges and adjusted plans appropriately and effectively to keep the project on track.

Provide links to the project's website and/or any social media:
Website: https://www.cdsn-rcds.com/ Twitter account: @CdsnRcds Podcasts: • BattleRhythm https://www.cgai.ca/battle_rhythm_podcast • Conseils de sécurité   https://www.cdsn-rcds.com/conseils

Refer to SSHRC's Guidelines for Effective Knowledge Mobilization for examples of effective knowledge mobilization activities.

Describe the knowledge mobilization activities and events that have been accomplished to date as a direct result of the Partnership Grant and the extent to which your project is meeting the measures of success as outlined in your application and/or Milestone Report. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvement related to knowledge mobilization, describe how this feedback has been addressed. If you have experienced challenges, describe them and how they have been addressed. If you have adjusted your plans, explain and justify these changes. Finally, briefly outline your plans moving forward and describe how they will allow you to meet the goals and objectives of your project. You may wish to include, as an appendix, diagrams, charts or lists of publications that help to clarify your knowledge mobilization plans and that are tied to specific team members and objectives of the project.

Project Response:
Our website features our mantra: Research, Connect, Amplify. Our knowledge mobilization efforts have been at the heart of our effort, and have been most successful as we have sought to co-produce research, to publish our results on conventional outlets, to maximize the use of social media to share our findings with the policy community, and the broader Canadian public, to communicate directly to policy makers, and to facilitate the professional development of the next generation of defence and security scholars, scientists, policy-makers, military officers, and actors in the private sector. As mentioned above, Co-production has been a key strategy to share the knowledge generated by our research. With an official in the Directorate on Military Personnel Research and Analysis as a co-director of the Personnel research, our workshops directly inform policy makers. Likewise, our Security theme is co-led by an official at the Dallaire Centre of Excellence for Peace and Security, which addresses the use of children soldiers. Our podcasts have been most successful. We had planned for one—*Battle Rhythm*—but we worked with one of our partners-- Réseau d'analyse stratégique—to launch a second in French: *Conseils de sécurité*. We have over a hundred episodes between them. We have not only interviewed some of the most important people in

Project Response:

Canadian defence and security (the Minister of National Defence, the Deputy Minister, the Chief of Defence Staff, numerous senior officers) but we have also used it as a platform to highlight emerging scholars and those from historically excluded communities. We have used the podcast also to amplify the events and activities of our partners by bringing on their organizers and speakers and giving them a chance to talk to our listeners. While we are not entirely certain who our audience is, it is clear the audience has been growing and includes those working in and around the government. Moreover, the graduate students of our partners in Calgary have launched their own podcast—*SecurityScape*—featuring academics and graduate students from across Canada.

While many members had some contact with the government before we started, our consultations have accelerated over the past few years. Our Personnel theme has regularly been consulted by the new Professional Conduct and Culture Command of the Canadian Armed Forces. Our Civil-Military Relations theme has regularly been in contact with the Public Affairs division of DND. Many of us were consulted by retired Supreme Court Justice Louise Arbour as she reviewed the military amidst its sexual misconduct and abuse of power scandal. The new Minister of National Defence consulted with several of us as she was getting started. Several of us have testified in the past three years before Parliamentary Committees.

Similarly, the CDSN has become the go-to network for expertise when the media is seeking to understand and cover events involving defence and security. The collapse in Afghanistan, the war in Ukraine, and the abuse of power scandal are just some of examples of events causing the media to reach out to the CDSN for our expertise. Our Co-directors and other members have appeared in both traditional media (newspapers including op-eds, tv, radio) and new (podcasts, twitter meetups, blogs, etc).

Our Summer Institute has been an important effort to engage in dissemination, translation, exchange, brokering, and networking. In one week, we bring together the next generation of academics, policy officers, military officers, and folks from the private sector not just to share with them our cutting edge research but to get each to provide their perspectives and thus building bridges between different parts of the defence and security community. We have created two cohorts thus far that will be part of the larger network not just for the week-long institute but far beyond that. We are still developing initiatives to renew those contacts and relationships.

We have used twitter, linkedin, Instagram, blogs, and youtube to advertise our events and to amplify our findings afterwards. Our streamed events usually get hundreds of hits afterwards. Appendix 1 documents our success in sharing our research in more conventional, peer-reviewed outlets.

Has your project involved any of the following methods of knowledge mobilization? Select all that apply.

☒ Academic dissemination (*essentially, a one-way flow to other scholars in or near your field(s) of research*)

☐ Knowledge transfer (*transferring knowledge to scholars in other fields of research*)

☒ Knowledge translation (*writing or presenting research findings in more readable or useable forms e.g., writing for a wider or more diverse public*)

☒ Knowledge exchange (*exchanging or sharing knowledge with other disciplines or across sectors (two-way flow) e.g., workshop or conference*)

☒ Knowledge brokering (*facilitating the flow of knowledge between others*)

☒ Knowledge synthesis (*pulling together existing research in a useful form for other researchers or organizations*)

☒   Co-production (*building research teams or alliances that generate new knowledge based on an ongoing exchange of knowledge*)

☒   Networking (*organizing ongoing networks of scholars and/or other experts to mobilize knowledge*)

How many research products (including those under submission) have resulted directly from the Partnership Grant? You may append a list of publications tied to specific team members and objectives to help demonstrate the direct link to the project.

Products	Number Planned (in Milestone Report)	Number Developed	Number Planned (for second half)
Presentations	30	30	40
Interviews (broadcast or text)	50	295	400
Peer-reviewed journal articles (open access)	8	20	25
Peer-reviewed journal articles (subscription based)	18	34	30
Edited journal issues	1	3	4
Books (including edited books)	5	10	10
Book chapters	10	27	30
Entries (dictionary and encyclopedia)	--	--	
Conference publications	6	26	30
Articles in popular media	15	55	40
Reports, briefs, and other forms of grey literature	15	50	50
Artistic performances	--	3	--
Other (specify: Tweets)	1000	1664	2000

List the number of knowledge mobilization events that occurred directly as a result of the grant.

Event	Number Planned (in Milestone Report)	Number Developed	Number Planned (for second half)
Conference	10	31	15
Workshop	15	39	40
Summer institute	3	5	6
Media events (such as television/radio presentations)	60	140	60
Public debates	0	--	
Other (specify: Brownbag meeting, organisational meetings)	20	35	35

Midterm Review Committee Feedback:	Choose a descriptor.
Click here to enter text.	

3) Training and mentoring commitments have been executed and projected as planned or, if not, the changes are well justified and appropriate.

Refer to SSHRC's [Guidelines for Effective Research Training](#) for examples of effective research training activities.

With respect to the project's training and mentoring activities, explain your accomplishments to date and the extent to which your project is meeting the measures of success as outlined in your application and/or Milestone Report. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvement related to training and mentoring, describe how this feedback has been addressed. Describe progress made to date in the training and/or development of research or support staff. Explain the expected degree of participation of the research staff (students, specialists, individuals from partner organizations and others) to be expected by the end of the project.

If you have experienced challenges, describe them and how they have been addressed. If you have adjusted your plans, explain and justify these changes. Briefly outline your plans moving forward and describe how they will allow you to meet the goals and objectives of your project.

Project Response:

One of the most important objectives of the CDSN has always been to foster a more diverse, inclusive, and equitable next generation of defence and security scholars, scientists, government officials, military officers, and private actors. So, training and mentoring has been one of the most important aspects of our efforts. We built important initiatives into the grant and then added as opportunities and crises arose.

We have involved students at all levels in our efforts. We have worked most closely with MA and PhD students who have worked in the research themes and at our headquarters. In the themes, they have engaged in multiple aspects of research: helping to design the research projects, propose and revise survey questions, planning and transcribing interviews, running analyses, assessing findings, writing up the results, and dissemination At our headquarters, our students have been involved in every stage of our effort from assisting the various grant applications to generating ideas for events to executing the events to research for the podcasts to assessing the activities. Our training efforts always attempt to give the students both the room to innovate and the guidance to ensure that they learn multiple lessons from each activity. Our mentoring involves frequent meetings, constant communication, receptivity to feedback (which has led to new initiatives and changes in how we deploy our plans), and much encouragement along the way.

Mentoring the staff has been more of a challenge, as we had far more experience training and mentoring students. We have initiated annual reviews that include developing, monitoring, and revising professional development plans. Turnover in one of our positions has impeded mentoring, but we have made considerable progress in the professional development of our more long-lasting staffers. We have facilitated the development of additional skills and have given additional, higher-level responsibilities to promote their professional development.

A key training effort, the **Summer Institute**, has been affected by the pandemic as we had to cancel the first attempt, move the second online, and only had the original idea implemented in our fourth year. The Summer Institute combines networking and professional development so that emerging scholars spend a week with junior policy officers, lower rank military officers, and emerging individuals in the private sector. The aims include having them each share their perspectives to break down the siloes and build bridges at the start of

> **Project Response:**
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> their careers, learn from experts about the enduring challenges and cutting-edge findings, and creating cohorts so that they can train and mentor each other now and deep into their careers.
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> The **Capstone Seminar** has been an important mentoring effort. We solicit nominations from our partners for the best presentations over the year at our partners' events. We then provide a new platform, our seminar, for these largely emerging scholars to present their work to a different and usually broader audience. We provide feedback along the way as well as connecting them to each other so that they become part of the community.
>
> A key objective has been to foster a more inclusive and diverse next generation, but we realized that we had not originally developed any specific opportunities for undergraduates from historically excluded communities. So, we developed an **Undergraduate Excellence Scholarship** aimed at such students, and each year we have improved this effort. At first, we simply provided some funding for their scholarship and invited them to our events. In the second year of this effort, we helped our two Scholars apply for and receive Young MINDS grants from the Department of National Defence. We discussed their ideas and provided feedback on their grant applications. Both students were successful, so we then helped them execute their projects. This involved helping them contact speakers, organize their events, advertising to attract participants and then audiences, facilitate translation, and then present the events in person (in one case) and online (in both cases). One of the projects involved a "hackathon" which brought another 20+ undergraduates into the project.
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> Each theme team has **organized internships** in their community including at Project Ploughshares and the NATO Defence College.
>
> We have funded three **post-doctoral students**, with a co-director closely supervising and mentoring each one while the larger CDSN team has been involving the post-doctoral scholar in our various efforts—podcasts, Capstone Seminar, Year Ahead conference, Summer Institute, etc. Our first post-doctoral scholar, Linna Tam-Seto, is now one of the co-hosts of our podcast. Through her post-doctoral fellowship, she was able to develop more confidence and expertise on defence issues, extending her work on studying mentoring, putting in her a better position to discuss a variety of issues on the podcast. Our second postdoctoral scholar, Johanna Masse, is continuing the research project she began during her fellowship at the CDSN on military women and gendered stereotypes. She is also in the process of organizing a two-day event titled "From the Margins and Outside the Box. New Perspectives on Researching the Military." Beside her own projects, she is now the project coordinator for the CIDP Gender Lab. Our third postdoctoral scholar, Thomas Hughes, is building on his doctoral studies to explore threat perception and confidence-building in the Arctic. The fellowship is providing him with the opportunity to add depth to his work by attending workshops and conferences and extending his network of contacts, especially in Atlantic Canada. He is also working on developing his dissertation into a book manuscript and is a frequent commentator to the media on the Russian invasion of Ukraine and Canadian defence policy.
>
> Our **book workshop** is an effort to mentor an emerging scholar. Each year, we hold one workshop to provide a scholar with feedback on their manuscript. The aim here is not just to help the scholar publish their work in the best possible outlet but also to develop their skills so that they will be better able to write and publish books later in their career. The first book in this effort, by Stephanie Martel (Queens), has been published by Stanford University Press.

How many students, postdoctoral researchers and/or non-students, respectively, have participated in your project?

Student Level	Number supported by SSHRC grant		Number supported by host and/or partner contributions	
	Canadian	Foreign	Canadian	Foreign
Undergraduate students	58	2		
Master's students	55	7	16	
Doctoral students	26	4		
Postdoctoral researchers	4		2	
College students	--			
Other (e.g., technician, professional research associate)	13			
Total Number	156	13	8	

Indicate, if applicable, the kinds of activities in which students and/or postdoctoral researchers, supported by the SSHRC grant, have been engaged as part of this initiative. Select all that apply.

Activities	Undergraduate students	Master's students	Doctoral students	Postdoctoral researchers	College Students
Data collection	☒	☒	☒	☒	☐
Data entry	☒	☒	☒	☐	☐
Data analysis and literature review	☒	☒	☒	☒	☐
Communications (e.g., lecturing or presenting at conferences)	☒	☒	☒	☒	☐
Mentoring	☒	☒	☒	☒	☐
Networking and collaborations	☒	☒	☒	☒	☐
Outreach activities	☒	☒	☒	☒	☐
Participation in publications	☒	☒	☒	☒	☐
Project Design	☒	☒	☒	☒	☐
Report writing/editing	☒	☒	☒	☒	☐
Teaching (including pedagogy and/or educational training).	☐	☒	☒	☐	☐
Internships or other activities in the business, not-for profit or government sectors	☒	☒	☐	☐	☐

Activities	Undergraduate students	Master's students	Doctoral students	Postdoctoral researchers	College Students
Activities that provide international experience	☒	☒	☒	☒	☐
Other (specify: Click here to enter text.)	☐	☐	☐	☐	☐

Midterm Review Committee Feedback: Choose a descriptor.

Click here to enter text.

4) Governance and management structure is functional and appropriate

Start this section by identifying any changes (i.e., additions, withdrawals or removals) in the project team and/or partner organizations from the start of the project and offer a brief justification for these changes.

Briefly describe the management and governance approaches and structures of the partnership, including details about how the partnership is organized (e.g. working groups, clusters, teams, etc.). List the research and/or related activities or sub-projects associated with each grouping within the partnership, as appropriate. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvements related to governance, describe how this feedback has been addressed.

Assess the effectiveness of these structures and approaches employed by the partnership (e.g., approaches to communication, decision-making, conflict resolution, etc.). Highlight the successes that have been facilitated by the project's structure and identify challenges that have been encountered. If the structure has changed over the duration of the project, explain and justify these changes.

Project Response:

Our original governance design is largely intact. We started with an Advisory Board, a Headquarters, and a team of Co-Directors with subgroups of Co-Directors running each of the five research programs. Overall, this has worked out quite well, as the research programs have been making progress, the advisory board has been providing very helpful feedback, and the headquarters has been managing and disseminating the work. Each one has had some changes in personnel, and our effort to develop an additional board, a Diversity Council, did not work out as intended.

The five **research teams** became four as the Procurement theme did not work out as we had planned. That research is now subsumed within our Civil-Military Relations theme. Our team of Co-Directors has grown considerably as we developed new research agendas funded by DND's MINDS program. We accomplished two goals along the way—addressing more Security issues (global health, climate security, supply chain vulnerability, and nature-induced domestic emergency operations) that affect Canadians across the country; and building a more diverse team of Co-directors (our initial focus on gender and linguistic diversity did not facilitate racial or regional diversity). So, we know have eight teams funded by two grant streams—SSHRC and DND. We have been meeting quarterly. We will be holding a midterm workshop to give each theme a chance to present their work and their plans to the rest of the network.

Project Response:

Our **advisory board** consists of respected senior academics and leaders of our various partners. We ask them for advice whenever we consider a new partner, and we meet yearly to discuss strategic issues. The makeup of the group has changed over time, partly as personnel have rotated at our partners' organizations and partly due to the melding of our Diversity Council.

One of the challenges for our effort (and in any partnership effort) is to foster a diverse, inclusive, and equitable partnership. Working with other organizations made us realize that we could do better. One initiative was an undergraduate scholarship discussed earlier. Another was to build a group of individuals from historically excluded communities (Indigenous, LGBTQ2S+, racialized Canadians) to provide feedback and help us network: a Diversity Council. We quickly realized that having this as a separate body was a mistake, so we brought several members of this group onto the Advisory Board so that all decisions and guidance include a variety of perspectives.

The partnership has been healthy and dynamic. We have added nine partners from both the public and private sectors, from Canada and the United States. Partners have varied in how much they contribute each year, but our overall level of contributions has been outstanding.

The reviews of our grant application indicated that we lacked experience in managing such an enterprise, and they were quite right. While the CDSN has functioned quite well, particularly in terms of organizing and delivering events, coordination and communication between the director, the co-directors, the advisory board, and the partners could have been better. We have not had any major conflicts to resolve, but we realized that infrequent meetings led to misperceptions and confusion. We have worked to improve the flow of information, to clarify how we make decisions, and what is expected of the advisory board. We have instituted regular checkups with each research team, we now have yearly check-ins with each partner, and we are sending our staff to the events of our partners to ensure that we know what everyone is doing and that we can learn from each other. We also learned that hiring is not easy.

We have developed a yearly reporting system that has worked quite well as a basis for the CDSN annual reports and as a basis for this report. We are now using the next wave of events to bring together the co-directors to improve our communications within the network. We are holding a mid-term conference to exchange research findings, and we will be planning an edited volume conference in year 6 to facilitate a thorough examination of the common theoretical framework—principal-agency theory—to determine variations in its usefulness for each research program.

Midterm Review Committee Feedback: Choose a descriptor.

Click here to enter text.

5) Partner organizations are engaged in the project.

Assess the extent to which the partnership structures have facilitated partner engagement and describe how partner organizations are contributing to project activities. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvements related to partner engagement, describe how this feedback has been addressed. If partner engagement could be improved, provide a strategy or

plan to further engage partners moving forward. You may wish to include, as an appendix, diagrams or charts that help to clarify your governance and management structures.

Project Response:

Our partnership is quite large, so we use four categories to ascertain and assess the roles of each partner: research generators, research consumers, capacity builders, and research disseminators.

Research generators include research centres in and outside of Canada, government agencies that are tasked with analysis, and private research firms. Our research teams are based at some of these institutions and have involved these partners in our research agendas. They have helped design the project projects, provided data, shared pre-existing research, facilitated surveys, and co-authored work with scholars in the network. The most engaged research generators are, of course, the homes of our co-directors. Some partners have hosted our workshops and other research events. Unfortunately, several military-affiliated research centres in Canada (CNSS, CIAAF) and the US (Strategic Studies Institute) have shifted focus or otherwise reduced their activities. As mentioned earlier, by adding partners we have more than compensated for the reduction in effort by others.

Research consumers are government agencies and non-government agencies that are seeking research for their evidence-based policy-making. The Canadian Armed Forces, especially Canadian Special Forces Command, along with Project Ploughshares and the Rideau Institute, have asked us to brief them on our research findings and have joined our workshops to learn firsthand from our research efforts.

Research disseminators are organizations that seek to share the knowledge we create with broader audiences. Our partnership with Canadian Global Affairs Institute includes hosting our podcasts and sharing them with their larger, more established audiences. While OpenCanada is currently between editors, when it is working well, it shares our work with Canadians interested in international affairs. That relationship has built bridges with the Canadian International Council which has not been formalized but has served as a conduit to the public across Canada. This category includes transnational academic associations that serve as a bridge to scholars elsewhere.

Capacity builders are organizations which seek to help individuals and organizations reach their potential. Bridging the Gap, for instance, is a Washington, DC-based organization that seeks to break down silos between academic and policy communities, and they have been helpful not just in inspiring the CDSN but in presenting their work and findings at the Summer Institute and advising us on our various initiatives. We have mentored a new group—Women of Colour Advancing Peace and Security-Canada. We asked them to organize a panel for our annual Year Ahead conference, which both increased the diversity of our program and elevated their new organization in Ottawa. The first effort, on Islamophobia and National Security, was far more critical and engaging than most defence/security presentations in Ottawa. They also provide us with help identifying individuals in their networks so that we can have more diverse panels for our conferences and cohorts for our Summer Institute. We have a similar relationship with another nascent network and new partner: Emerging Leaders in Canadian Security. This new group is focused on the next generation of defence and security scholars, scientists, and especially those in the private sector. This effort improves our access to new people in this space and particularly to those in the private sphere, which was not a strength of our organization. We have promoted them and connected them to the rest of the defence and security community. Women in International Security-Canada was established before us, so they have been helpful in shaping our original networking efforts and connecting us to women in the various parts of the defence and security community so that we have always had good gender balance in our organization and our events.

We continue to build our network

      a. We have added two largely Francophone networks (L'Institut militaire de Québec, the Network for Strategic Analysis) to improve knowledge transfer from and connections to French-speaking scholars.

Project Response:

   b. We have added government-funded entities from Canada (Dallaire Center of Excellence) and the United States (US Air War College) to improve our engagement with the public sector.

   c. We have added newly formed networks—Emerging Leaders in Canadian Security and the Canada and Asia-Pacific Policy Project—that have expanded our reach to younger folks mostly in the private sector and to western Canadian academics respectively.

We are working on revising our enlargement strategy so that we do not overextend yet continue to widen our perspectives and support new entrants into this sector.

Midterm Review Committee Feedback: Choose a descriptor.

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6) The host institution and partner organizations are largely meeting their commitments, and the project is on track to secure the 35% cash and in-kind contribution requirement.

This criterion will primarily be assessed based on the partner contribution workbook that is submitted to SSHRC each year. As this workbook is quite detailed, only describe partner and host contributions in high-level, general terms.

Identify the extent to which the commitments made in the Formal application have been met by the host institution, partner organizations and supporting organizations. Highlight any anticipated shortfalls or additional support and their impacts on project plans. If contributions are not on track to meet SSHRC's 35% minimum requirement, describe any plans or actions being undertaken to obtain additional contributions. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvement related to contributions, describe how this feedback has been addressed.

Project Response:

In just three years, we have **easily exceeded** the 35% requirement: we have received more than **68%** of our total SSHRC funding in cash and in-kind contributions from our partners and host institution. Much of Carleton's commitment to the CDSN Partnership was made immediately with $476,000 deposited into Saideman's research account to spend mostly on administrative staff—project management costs, knowledge mobilization, and course releases. In addition, Carleton has funded much space (an office, lecture halls and seminar rooms for events), graduate student assistantships, library support and more. Most partners have met their commitments, including university research centres, think tanks, other defence networks, private firms (the Nanos survey firm has been quite consistent, for example). Some changes in government policies, both in Canada and the US, partly in reaction to the pandemic, has meant less funding for the CDSN-Queens event—the Kingston International Security Conference. Similarly, some of our international partners have reduced funding due to the pandemic interrupting their operations.

We have compensated for these shortfalls (while still having a trajectory of more than 100% matching) in two ways:

Project Response:

1) We have made agreements with nine new partners who have provided very valuable contributions to the CDSN (see previous question/answer)

2) We have been successful in various grant efforts (DND's Mobilizing Insights on Defence and Security program, SSRHC's Connection Grants) to provide additional funding for our events.

    a. MINDS Targeted Engagement Grants have funded specific events.

    b. MINDS Collaborative Network Grant will provide $750,000 over three years to fund new research streams focused on emerging challenges (pandemics, climate change, supply chain vulnerability) and the increased pace of domestic emergency operations that have resulted.

Midterm Review Committee Feedback: Choose a descriptor.

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7) Budget allocations are projected as initially planned or, if not, the changes are well justified and appropriate.

Provide details on budget allocations in the first half of the project and explain any significant changes from the proposed budget in the original application. Also provide a detailed budget justification for the remaining period of the project, highlighting any significant changes from the initial application and/or Milestone Report. Amounts should correspond with the tables below. If the expert panel and/or the adjudication committee at the Formal application stage raised concerns or made suggestions for improvements related to the budget, describe how this feedback has been addressed.

Project Response:

We have underspent somewhat during the first half of the grant largely because of the COVID pandemic. The pandemic caused us to cancel our first Summer Institute and put online our second Summer Institute as well as making the same shift for conferences and workshops as well as one Capstone Seminar. The pandemic also restricted travel. While we spent more money on audio-visual services to facilitate streaming and teleconferencing, this has been offset by the reduced travel costs.

We have also received more money than anticipated from a variety of sources. We received additional SSHRC funding for personnel costs during the first months of the pandemic. We were successful in our pursuit of a SSHRC Connection Grant, and we received several MINDS Targeted Engagement Grants,

On the other side, we underestimated the costs of our Post-Doctoral Fellowships, as our host institutions have standard rates higher than what we budgeted. We also did not budget enough money for our graduate research assistants at Carleton. We didn't allocate any funds in our original grant application for the Book Workshop, so we have allocated some of our unspent conference funds on that effort. We also underestimated the costs of running a podcast as we need to pay hosting fees to various outlets.

We have developed a variety of new initiatives aimed at fostering a more diverse, inclusive, and equitable defence and security community: a scholarship for undergraduate students from historically excluded groups, helping these students with their DND-funded projects, and a diversity audit which funded the efforts by a consultant to assess how the CDSN could do better.

Project Response:

We are finessing the changes in our spending by using our non-SSHRC revenue to cover the new/additional expenditures. We received a large grant from DND that will help cover the book workshop, some of the Summer Institute, and conference costs. We will use that grant as else as other contributions from Carleton to cover the additional personnel costs including the post-docs.

7a) Actual Expenses in the first half of the project.

Complete the budget table below for the first half of your project. The categories are based on the original application and this section should show how SSHRC funds were used in the first half of the grant. Any significant deviations must be justified in the text box above (e.g. changes in allocation of funds dedicated to students).

Budget categories		Actual Expenses**		
		Year 1	Year 2	Year 3*
Students salaries and benefits/stipends	Undergraduate	5139.22	20,212.15	24,863.03
	Masters	9485.74	16,203.46	14,382.66
	Doctorate	21207.55	20,613.14	27,650.11
Non-student salaries and benefits/stipends	Postdoctoral	0	32,562.08	51,097.12
	Other	72,763.26	27,592.85	94,756.43
Travel and subsistence costs	Participants – Canadian travel	13,449.72	7,625.51	3345.39
	Participants – Foreign travel			
	Students – Canadian travel			
	Students – Foreign travel			
Other expenses	Professional/Technical services		51,936.27	32,811.08
	Supplies	14,795.63	7,593.33	10,982.95
Non-disposable equipment	Computer hardware			
	Other		5,909.80	1,476.41
Other expenses (specify)				
Total		136,800.74	190,248.59	261,365.18

* For 5 year projects, please include both the actual and projected expenses for year 3.
** Not all partners have submitted their 300 forms, so at the end of the third year, we had $422,807.82 committed but not accounted via these forms.

7b) projected expenses for the remainder of the project.

Complete the budget table below for the remaining years of your project (i.e. for 5 year projects complete years 4-5, for 6 year projects complete years 4-6, and for 7 year projects complete years 5-7). The categories are based on the original application and should account for the use of SSHRC funds for the remaining years of the project.

Budget categories		Projected Expenses			
		Year 4	Year 5	Year 6	Year 7
	Undergraduate	23,305	29,181	29,763	30,357

Budget categories		Projected Expenses			
		Year 4	**Year 5**	**Year 6**	**Year 7**
Students salaries and benefits/stipends	Masters (Graduate RAs for all themes)	70,040	43,400	66,729	30,000
	Doctorate	40,000	40,000	40,000	40,000
Non-student salaries and benefits/stipends	Postdoctoral	62,032	62,821	57,516	55,464
	Other (Staff)	64,930	69,509	70,899	72,317
Travel and subsistence costs	Participants – Canadian travel	81,984	79,000	79,000	79,000
	Participants – Foreign travel	12,000	13,500	13,500	13,500
	Students – Canadian travel				
	Students – Foreign travel				
Other expenses	Professional/Technical services	32,466	34,485	74,918	35,595
	Supplies	5,500	6,000	6,000	6,000
Non-disposable equipment	Computer hardware	4,500	4,500	0	0
	Other	1,500	0	0	0
Other expenses (specify)			0	0	
	Total	$362,593	358,996	438, 326	362,233

Midterm Review Committee Feedback:	Choose a descriptor.
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