



Lessons From The Long War: A Soldier-Focused, Data Driven Analysis of Retention

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Political debate continues over how the United States can maintain military readiness and win its next war, in light of sequestration, declining budgets, and personnel cutbacks. The National Guard (NG) and the Army Reserve (AR) as part of the total force must also adapt to the realities of fiscal constraint while bearing the weight of being an operational force. The standard of being an operational force for the NG/AR was difficult to achieve before sequestration. It is much tougher now, for there is no money to buy readiness.

Given this strategic backdrop, the NG/AR has a complex problem on their hands. How does the NG/AR retain their soldiers with combat experience to maintain readiness given the demands of being an operational reserve? The 33rd Infantry Brigade Combat Team (33rd IBCT), like all NG brigades, is confronting this problem. In 2012, the 33rd IBCT lost 556 soldiers for a number of reasons, but primarily expired term of service (ETS). The brigade's experienced soldiers had completed their initial term of service and decided to opt out of the NG. See Figure 1.

The 33rd IBCT was losing the retention battle, and by extension, critical combat readiness.

Commanders have always struggled with retention; today the problem is much more significant because it is not easy to replace experienced soldiers. The necessary skills needed in new recruits go well beyond basic rifle marksmanship, including aptitudes for information technology, linguistics, and so forth. The time needed to qualify a soldier can be upwards

of one year depending on the military occupational specialties. However, even with this advanced training, they do not have combat experience. Furthermore, there are fewer combat experienced soldiers repopulating the ranks of the NG/AR due to the fewer deployments. Therefore, retaining soldiers who served in OEF/OIF operations is a significant readiness concern.

LOSS GOAL FYTD: <485
PERCENT OF FYTD: 115%

RETENTION GOAL FYTD: 364
PERCENT OF FYTD: 84%

33 IBCT-Top Loss Categories (448 of 556)

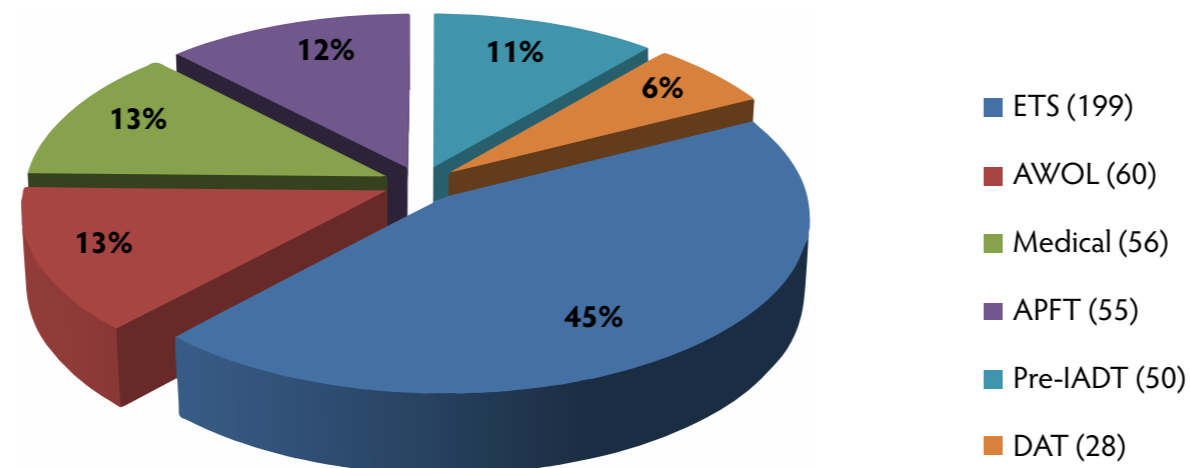


Figure 1

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In response, the 33rd IBCT command team took an unusual tack by drilling down into this wicked problem by creating their own survey; a data driven and soldier focused analysis to explore the reasons why it was losing soldiers. Instead of speculating on what our soldiers wanted, the brigade surveyed almost 2,000 soldiers about readiness, retention and their lives.

The soldiers of the 33rd IBCT completed a one-page survey consisting of seven demographic items, seven Likert scale questions, and one open-ended written response. In the demographic section soldiers, were asked to provide their military occupational skill (MOS), years of service, unit, rank by range, employment status, and if they were married or had children.

In the survey body, soldiers were asked to rate their response to the following seven questions on a scale of one to five with one being the most significant negative impact, 3 being no impact/neutral and five being the most significant positive impact. The questions are as follows:

1. Will your experience at annual training 2012 at Camp Ripley (xCTC) have an impact on your decision to re-enlist or remain in the National Guard?
2. Do the requirements for mandatory online classes, additional training, and other National Guard events affect your decision to re-enlist or remain in the National Guard?
3. Does the current command climate of your unit effect your decision to re-enlist?
4. Will the availability of medical coverage (TriCare), dental coverage, family assistance agencies, legal counsel, and bonuses effect your decision to re-enlist or remain in the National Guard?

5. Do extended IDT periods (MUTA 6, 7, or 8) affect your decision to re-enlist or remain in the National Guard?

6. Will the possibility of mobilization and deployment effect your decision to re-enlist or remain in the National Guard?

7. Does your family support your reenlistment or remaining in the National Guard?

Finally, the soldiers were asked one qualitative question, "If you could tell the brigade commander one thing, good or bad, in regard to the effect the National Guard has on your life, what would it be?"

Analysis of the Qualitative Results

Initially 1,938 surveys were returned for analysis. Surveys where respondents left at least one of the seven survey body questions blank were removed leaving 1,922 responses. While soldiers were clearly generally comfortable answering the survey questions, they were more likely to avoid providing demographic information. Soldiers who did not provide their years of service, rank, employment status, marital status, or parenting status were also removed from the sample resulting in 1,747 completed surveys. A description of the sample is provided in Table 1 below.

Responses to the seven Likert scale survey questions were analyzed and compared across several demographic variables: rank, employment/school time commitment, marital status, and parental status. Results are presented in Table 2. Higher scores indicate a more positive impact on soldiers' self-evaluation of likelihood to re-enlist or remain in the NG. For each variable comparison group the highest and lowest

ranked responses are marked in bold. Asterisks next to the question name indicate statistically significant differences between comparison group responses. Regardless of the demographic variable being examined, all soldiers reported that benefits such as TriCare, dental coverage and bonuses had the most positive impact on their decision to re-enlist or remain in the NG. Similarly, extended Inactive Duty Training (IDT) periods of Multiple Unit Training Assembly

(MUTA) 6, 7, or 8 and additional training and classes were consistently ranked most negatively by all respondent subgroups.

The roles of employee, student, spouse, and parent are all commitments that exist in parallel to respondents' commitment to the NG. It appears when the military/work/life balance shifts due to increased training demands on the part of the NG, soldiers with more outside military commitments react more negatively to the

Table 1 Participant Demographics

	Enlisted (n=1607)	Officer (n=140)
Rank		
E1-E4	1027 (64%)	-
E5-E6	463 (29%)	-
E7-E9	117 (7%)	-
O1-O2	-	83 (89%)
O3	-	41 (29%)
O4-O6	-	16 (11%)
Years of Service	6.4 (SD=5.6)	9.7 (SD=6.5)
Employment		
Full time student	412 (25%)	12 (8%)
Unemployed	143 (9%)	8 (6%)
Part time employed	189 (12%)	21 (15%)
Full time employed	863 (54%)	99 (71%)
Married	484 (30%)	80 (57%)
Children	592 (37%)	58 (41%)

Table 2 Reenlistment Variables Analyzed by Demographics

	Enlisted (n=1607)		Officer (n=140)	
	mean	SD	mean	SD
3 week Annual training***	2.83	1	3.17	.77
Additional training (online)	2.76	.83	2.69	.77
Command climate*	3.14	1.07	3.38	.97
Benefits	3.61	1.02	3.64	.92
Extended IDT	2.70	.98	2.71	1.05
Deployment***	3.48	1.12	3.18	.95
Family support	3.32	1.06	3.40	1.05

	Full Time Commitments (n=1386)		Non-Full Time Commitments (n=361)	
	mean	SD	mean	SD
3 week Annual training	2.85	.99	2.91	.96
Additional training (online)**	2.73	.83	2.86	.80
Command climate	3.16	1.08	3.17	1.01
Benefits	3.61	1.01	3.61	1.01
Extended IDT***	2.64	.99	2.93	.93
Deployment	3.44	1.11	3.52	1.09
Family support	3.31	1.06	3.37	1.05

	Married (n=564)		Non-Married (n=1183)	
	mean	SD	mean	SD
3 week Annual training	2.87	.95	2.86	1.01
Additional training (online)*	2.69	.85	2.79	.81
Command climate	3.19	1.07	3.15	1.06
Benefits	3.61	1.03	3.61	1
Extended IDT***	2.57	1	2.77	.98
Deployment***	3.23	1.03	3.57	1.13
Family support	3.29	1.31	3.34	1.02

	With Children (n=650)		Without Children (n=1097)	
	mean	SD	mean	SD
3 week Annual training	2.82	1	2.88	.99
Additional training (online)	2.74	.85	2.77	.82
Command climate	3.14	1.05	3.18	1.07
Benefits	3.55	1.05	3.64	.99
Extended IDT*	2.64	.99	2.74	.99
Deployment***	3.26	1.07	3.58	1.11
Family support	3.3	1.08	3.34	1.04

*p<.05 **p<.01 ***p<.001

perceived intrusion. For example, respondents who had full-time work or school roles rated extended IDTs and additional training requirements more negatively than respondents who were unemployed or worked part-time. Soldiers with spouses and children were more likely than soldiers without to view extended IDTs and deployment negatively.

Analysis of Qualitative Component

In our survey we also included an open-ended question, “If you could tell the brigade commander one thing, good or bad, in regards to the effect the National Guard has had on your life, what would it be?.” This question was answered by 41.5 percent (803) of the total sample. For this analysis 364 surveys, the entire number submitted from the officer ranks of 2nd lieutenant-to-lieutenant colonel, and the enlisted ranks of sergeant to first/master sergeant were analyzed. These particular ranks were chosen, for they were the ones more likely to have deployed and they also bear a more burdensome time commitment.

To increase validity of the qualitative responses three University of Illinois coders were used to identify themes and define codes and two soldiers from the National Guard were consulted on the appropriateness of the codes. Attention was paid to the initial rationale for the survey - reenlistment and retention, and its relationship to high operation tempo

(OPTEMPO) training as defined as extended weekend training assemblies (known as MUTA 6, 7, or 8s), and three week Annual Training (AT) periods. The impact of the prolonged high OPTEMPO was seen in several ways.

Time Commitment

An overarching theme to the open-ended question related to the increase in the time commitment that was required by the new heightened operational tempo. This theme revealed itself in a variety of ways: change in the demands over the years, the impact on outside life, especially work and family, and the continued high OPTEMPO despite a scaling down in deployments.

“This job has changed drastically over the years. The commitment of our soldiers and leaders is overwhelming. These citizen soldiers are citizens about 28 days a month. ...Some do not have the time or resources to complete many of the tasks we ask them to do. Then we ask them to not only do one weekend a month but take off work multiple months in a row on Thursday and Fridays as well.”

Another soldier talked about the difficulty maintaining balance and the impact this has on reenlistment:

“It has been difficult to balance professional and civilian life with the obligations of the Guard. This has a major effect on my decision to reenlist. It’s a full time job without the full time pay or benefits.”

Especially problematic is additional training that does not receive compensation:

“One negative aspect regarding the National Guard in the past few years is the current additional demands placed on the individual soldier. Between the online training, for which the soldier does not receive any compensation, and the extended drill weekend, the National Guard is no longer “One weekend a month, two weeks a year.”

Impact on Outside Life

The responses showed an impact on the personal lives of the Guardsmen in two primary ways: Family and Employment or Career. One soldier discussed in detail the difficulty with increased MUTA drills:

“Many soldiers already lose time from work due to a normal MUTA 4 drill, extending multiple drills to MUTA 6 and 8 pushes that percentage of soldiers adversely affected to almost 100 percent. Is the trade off, of what is accomplished by having a MUTA 6 or 8 drill worth those adverse financial and family effects? I would strongly suggest that without very strong justification no MUTA 8 drills be approved and that MUTA 6 drills be severely limited.”

Additionally, another Guardsman questioned if the heightened level can be maintained:

“Many families have sacrificed time away from kids, spouses, and significant others for deployments, schools, and extended IDT weekends. A runner cannot sustain a spring pace forever. At some point, he/she will realize the cost/benefit

ratio and just walk away. ...we are losing our greatest assets. Those sergeants and staff sergeants with 10-14 years of service that are walking away.”

One Soldier discussed the tension between their dual commitment to the Guard and family:

“Soldiers love to serve and love the National Guard. But what they love more are their families. Their families will always win over the Guard. In our time of dwindling numbers, we should take this more into consideration.”

Employment

Since many National Guardsmen also have civilian careers, the higher level of training directly affects their ability to hold and maintain these jobs. There are indications that employers’ initial levels of support and tolerance for time away for training time are waning:

“Deployments or AT are not an issue. Anything beyond a MUTA 4 seriously inhibits my ability to find and hold a full-time job... Extending beyond a two-week period of AT also negatively impacts my employability. As the war stretches on, my potential employers become less tolerant of time away.”

Some soldiers stated the additional time for education and training inhibits their civilian career:

“Longer training affects my personal life as well as my employment in many ways. School is a big part of it and because of these longer stretches of training, I have had to put it on hold for a while. Also, my work suffers because of having to be away

sometimes when I have important things going on and are time sensitive.”

IDT Periods

One of the most frequently mentioned mitigating factors is the perception that troops are no longer training for deployments:

“The extended drill weekends without a deployment on the way are bad for retention. When you think about the fact that most people have to take off work for three longer weekends without any pay from work. In addition, their guard pay is not equal to the lost wages. It is a tolerable sacrifice if you going to deploy but not when you are no longer deploying.”

Another soldier states the motivation changed once they learned of their canceled deployment.

“What is our goal? My fellow soldiers and I were highly motivated for the upcoming deployment that ended up getting canceled but the high speed training tempo hasn’t slowed, (e.g. long drill days and 5,6,7,8 MUTAs). It seems like we are training for the road to war but now we aren’t going anywhere.”

Positive Impact Despite High OPTEMPO

Regardless of the impact of the heightened operational tempo, it would be inaccurate to state that the responses entirely negative. Many responses were positive and several expressed the dichotomy of the challenges of an increased level of training with a pride and dedication to the National Guard.

One Guardsman succinctly stated:

“Proud to SERVE, getting TIRED!”

Furthermore, one officer showed the complexity of both the positive and negative impact the Guard has made on their life and the lives of their troops, especially as the heightened level continues:

“While the National Guard has been one of the best decisions of my life and I have benefited from it in some any ways, as of late, I feel that it requires too much from us... I genuinely feel that this has a great negative impact on retention for those who are employed outside of the military. As a company commander, this is a huge reason in my opinion why many good soldiers do not stay in. At a minimum, I hope the OPTEMPO at least slows down for the lower enlisted.”

Also, several soldiers responded that their families were supportive, but were unsure how long that support could continue:

“I have enjoyed my time in the guard. I do not do it for money or fame. I have been a squad leader and it has been the best job I have had. My family and friends understand the sacrifices made, and are willing to continue to sacrifice any time and resources to support me. However after 11 years of continuous support the stress is beginning to take a toll.”

Themes and Initial Implications

Several themes rose to the surface with this survey: 1) Soldiers are extremely proud of their service and will suffer hardship to serve their country, 2) Soldiers in the NG like their life

compartmentalized; intrusions into the normal work week are not seen as beneficial, except when they are preparing for a deployment, and 3) Benefits matter to a great extent, but they may not overcome a burdensome OPTEMPO effecting one's civilian career and family.

Furthermore, several suggestions and solutions were repeated or inferred multiple times. First, at the unit level, unless the unit is going to deploy, limit high OPTEMPO training. Second, upgrade soldier technology capability by ensuring ready computer access at the Armories. Thirdly, have a "one-portal access" for all online training, then an automatic accumulation of retirement points on completion of annual computer-based training. Finally, the last suggestion was not specifically articulated in the survey, but rather an analysis of all the results; careful examination and caution should be given to any reduction in NG/Reserve benefits. Reducing benefits will likely lead to a lower retention rate.

Commander's Perspective

Commanders face risk and the Army's method to manage risk is Composite Risk Management (CRM). From the Army's 2009 Posture Statement "The primary premise of CRM is that it does not matter where or how the loss of a Soldier or Civilian occurs. The result is the same—decreased combat power or mission effectiveness." What this paper suggests is that the same kind of thinking should be used when it comes to implementing high OPTEMPO training; for a soldier who opts out of the NG/AR because of high OPTEMPO training is a decrease of combat power. This survey indicates high OPTEMPO training is

an independent variable which given different circumstances, a future deployment or not, may lead to different dependent variable, a high or low retention rate. Commanders must be deliberate and judicious when implementing high OPTEMPO training and it should coincide with a pending deployment or the unit's position within the ARFORGEN cycle. Therefore, commanders should use the principles of CRM when designing their training plan to balance high OPTEMPO training, the year the unit is in the ARFORGEN cycle, and the potential for deployment with retention.

Some postulate that a unit should take every opportunity to engage in high OPTEMPO training, because soldiers like training "hard." However, that line of reasoning is not supported by this survey and when taken to the extreme, it would potentially lead to everyone

wearing body armor all the time. Likewise, the survey does not indicate that soldiers want low OPTEMPO training that is not meaningful, for many of the quotes by the Soldier indicate willingness to sacrifice their and time with their families to support the nation. Therefore, there is a medium between these two ideas and depending on if the unit will be deployed or not.

Recommendation for Future Research

As noted in the findings, collecting responses for the main survey questions was not an issue but soldiers were more likely to decline to provide demographic data. This is an understandable issue when viewed in regards to concerns about confidentiality and anonymity. The higher a participant's rank or the more unique their MOS, the more identifiable they would have been to the command structure reviewing the

surveys. In addition, while those individual details might not have been sufficient to identify a participant, there may have been justifiable concern that the combination of demographics would make identity apparent.

Future survey research with military populations should consider three issues when designing demographic sections: What data is actually needed? What level of data detail is needed, and what combination of data is being collected? For this research, it was necessary to collect information about rank. However, it might have been more desirable to only ask if soldiers were enlisted or officers, or, since identification among high-ranking officers is easier and the large majority of the sample was enlisted, to only collect ranges of ranks among enlisted soldiers. Similarly, soldiers might not have been concerned about providing their MOS or Unit,

NG and UIUC Partnership

After the 33rd Infantry Brigade Combat Team (BCT) executed the survey, Colonels Hastings and Zubik approached the School of Social Work at the University of Illinois at Urbana-Champaign (UIUC) for assistance in analyzing the data. Dr. Hack and Ms. Cleeland agreed to represent the UIUC half of the research collaboration and each oversaw, respectively, analysis of the quantitative and qualitative data. Both the 33rd BCT and the School

of Social Work hosted several meetings that allowed members of the 33rd BCT command and researchers from the School of Social Work to meet and discuss the goals of the project, emerging findings, and future research directions. The joint effort between the Illinois National Guard and the University of Illinois proved beneficial to both parties. It provided the 33rd BCT data it would never been able to acquire and research on its own. It provided

the UICU a unique hands-on research learning opportunity for social work students at the bachelors (BSW) and masters (MSW) level. In the Fall Semester 2012, five MSW students volunteered their time to enter the quantitative data into a database statistical analysis. The success of the volunteer student involvement, an independent study course was developed for the Spring Semester 2013, which provided students an opportunity to assist

with data analysis and receive credits toward their degree. Two BSW students participated in the course by developing a research question and conducting the data analysis necessary to answer the question. Both were selected from a competitive campus wide application process to participate in the UIUC Undergraduate Research Symposium and present their findings.

but requesting the information together may have made them less comfortable.

Although the partnership between the 33rd IBCT and the UIUC was viewed by both parties as a complete success, it was more by sincere effort by both entities, than a well thought out plan. Unit and other researchers in this area are also encouraged these helpful hints:

- To conduct a project like this, the military personnel and the researchers must realize that they need each other. The military needs the expertise of the researchers and their

objective viewpoint. The researchers need the military for access and interpretations of the military lexicon.

- Both entities will not make it soldier proof, therefore be prepare to create rules to interpret the data.
- Be prepared to interpret slogans and symbols, such as “Centurions Forward!”
- Have stamina: It will be a long process with the National Guard; senior leaders have two professions and researchers have other obligations too.

Summary

For the NG/AR, retaining combat experienced soldiers and leaders is critical to maintaining the hard-earned designation of an operational force. We must train to deploy, but likewise we must ensure how we train does not induce our most critical assets away from our organizations. This survey indicates that being mindfully of three-week AT periods, extended drill weekends and making it easier to accomplish additional training outside of a MUTA status actually preserves our combat power,

not decreases it. The leadership of the National Guard and the Reserves has strong allies in the endeavor to sustain our “War Dividend.” Soldiers and their families fully support their service to their country and are willing to sacrifice their time for a deployment. Keeping these ideas in planning our training will help the NG/Reserves be fully prepared and combat ready.