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# Reducing the Number of Nonparticipants in the U.S. Army Reserve

Dr. Renata Washington Hannah  
*Walden University*

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# Walden University

College of Management and Technology

This is to certify that the doctoral dissertation by

Renata W. Hannah

has been found to be complete and satisfactory in all respects,  
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Walden University  
2018

Abstract

Reducing the Number of Nonparticipants in the U.S. Army Reserve

by

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MSA, Central Michigan University, 1997

BA, Clark College, 1986

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Management

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May 2018

## Abstract

The nonparticipation of U.S. Army Reserve soldiers throughout the Army Reserve Command is a critical problem for it results in millions of dollars in lost revenue. Retaining nonparticipant soldiers is a strategic, operational, and tactical priority for Army Reserve leadership. The purpose of this phenomenological qualitative study was to determine key themes concerning the potential root causes of nonparticipation in the Army Reserve. Using Herzberg's motivation-hygiene theory, research was conducted to analyze the themes that contributed to nonparticipation, particularly lack of attendance at monthly battle assembly and extended combat training. Data were collected from telephone interviews that were conducted with 20 participants and then transcribed and analyzed using auto coding and query-based coding features. Ten themes emerged from analysis of responses to the 14 interview questions. A key result was that the participants believed that family, work, and school conflicts were barriers for soldiers not attending battle assembly or extended combat training. Further exploration of the participants' experiences and perceptions resulted in the finding that communication was not effective between the leadership, staff, and first-line leaders and nonparticipant soldiers. Six participants agreed and 11 participants strongly agreed that new policy should be written to retain and recover nonparticipant soldiers. Study findings may enlighten the chain of command in the U.S. Army Reserve about the barriers leading to nonparticipation among soldiers and about how they may improve the participation rate. Such changes may foster more teamwork while contributing to productivity in the organization and safeguarding millions of dollars withheld from Army Reserve accounts.

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## Dedication

While on my dissertation journey, there have been some amazing people who supported me, especially my mother, Dolores H. Washington, and my son, William J. Hannah. I would also like to express my sincerest gratitude to my dear friend, Fredrick L. Tucker, for all of his love and support during this academic endeavor.

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“Faith is taking the first step even when you don't see the whole staircase.”

~ Dr. Martin Luther King, Jr.

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## Chapter 1: Introduction to the Study

### **Introduction**

All soldiers in the U.S. Army Reserve (AR), enlisted and officers, are held accountable for attending mandatory battle assemblies (BAs) once a month. The U.S. Army Audit Agency (AAA) has conducted three separate reviews of nonparticipants (NPs) in the AR (J. Talley, personal communication, September 18, 2012). John McHugh, Secretary of the U.S. Army, briefed the latest review, which occurred in January 2012. McHugh was critical of the AR's efforts to remove NPs and unsatisfactory participants (Unsats) from the units (J. Talley, personal communication, September 18, 2012). The report conclusions indicated that the AR could save as much as \$150.4 million with more assertive actions to resolve the problem of NPs (J. Stultz, personal communication, January 17, 2012). Subsequently, U.S. Army leaders have been seeking solutions to reduce the number of NPs throughout the AR.

Lieutenant General (LTG) Jack Stultz, who is the chief of the U.S. AR, noted that there has been little movement concerning NPs and Unsats in the U.S. Army Reserve Command (USARC) (J. Stultz, personal communication, May 11, 2011). LTG Stultz's goal is to rebalance the force, and one of his initiatives supporting this objective is to reduce the numbers of nonparticipating soldiers. Rally Point 32 is the operational guidance and direction for Army leaders, command teams, and staff who are mandated by the AR to reduce the number of nonparticipant soldiers (J. Stultz, personal communication, May 11, 2011).

The appointed 32nd chief of AR, LTG Jeffrey W. Talley, quoted the U.S. Army Ranger Handbook on what a leader is, stating:

The leader considers the use and location of rally points. A rally point is a place designated by the leader where the unit moves to reassemble and reorganize.

Soldiers must know which rally point to move to at each phase of the mission should they become separated from the unit. They must also know what actions are required there. (U.S. Army Reserve, 2012, para. 1)

An AR that can enable the Army to prevent, shape, and win across a full range of missions will be required in the future, LTG Talley suggested. The AR accomplishes its mission through dedicated citizen-soldiers and leaders (U.S. Army Reserve, 2012). The AAA's findings on NPs in the AR substantiate the need for qualitative research to find viable solutions to reduce the number of NPs in AR formations (J. Stultz, personal communication, January 17, 2012). I conducted this study to address this concern.

Chapter 1 includes an introduction to the study, with a focus on the problem, purpose, nature, and significance of the study. I will discuss the background of the study and then presents the problem statement, the purpose of the research, the nature of the study, and the research questions. Next, I will provide an overview of the theoretical framework identifying themes that influence workplace satisfaction and associated soldier AR participation. In closing, I will define key terms and consider assumptions, limitations, delimitations, and the significance of the study.

## **Background of the Study**

As Cone and Creed (2014) explained, the three levels of war are strategic, operational, and tactical. These guidelines, Cone and Creed noted, have been used to train military personnel throughout the centuries. Similarly, classical management theory is mainly attributed to Henri Fayol, who contributed to the school of management and, also, defined top-level management as being strategic by nature and using long range plans that are designed to achieve strategic goals (Schimmoeller, 2012). In contrast, mid-level management is tactical and involves the use of intermediate range plans that develop and support the implementation of strategic plans. Lastly, lower-level management is operational, with short range plans that are designed to determine the steps necessary for achieving tactical goals (Schimmoeller, 2012). In the field of business, the three levels of management are strategic, tactical, and operational, and in military circles, the levels of management are strategic, operational, and tactical (Schimmoeller, 2012). In this qualitative study, the order of the levels of management used was the same as those used in the military community: strategic, operational, and tactical.

The U.S. Army is divided into three components: the Regular Army, the Army National Guard, and the AR. The Army National Guard and the AR are the only components in which soldiers are known as citizen-soldiers. The USARC is the senior command of the AR. All commands in the USARC are responsible for soldiers, leaders, and unit readiness. Soldier readiness involves physical, emotional, social, family, and spiritual strengths (U.S. Army Reserve, 2012). The AR Troop Program, which belongs to



the USARC, has units worldwide, with total end strength of 205,000 soldiers and more than 12,000 civilians (U.S. Army Reserve, 2012).

The AR has more than 9,000 NPs who have not received pay for 6 or more months, and leaders must be relentless in the recovery and retention of these soldiers (Bressler, 2010). As Bressler (2010) noted, retention and soldier turnover are issues in the AR. The AR has mandated that tactical level commanders and first-line leaders work with soldiers to identify and resolve issues that may result in them becoming NPs (J. Talley, personal communication, November 21, 2014). As a result, the strategic and operational commanders and leaders have made reducing the numbers of nonparticipants in the AR formations a top priority (J. Talley, personal communication, November 21, 2014). Based on my review of the literature, there is a gap on the potential root causes of unacceptably high levels of nonparticipation among AR soldiers, such as communications, implementation, and chain of command. Colonel Elizabeth F. Wilson, deputy director of Military Personnel Management for Army G-1, stated:

The Army is at war and transforming and must take a full accounting of soldiers assigned to the AR. If soldiers do not resume mandatory training when encouraged, they will be processed for separation, and if appropriate, required to reimburse the government any unearned portion of incentives. (Powers, 2006, p. 1)

In another study, Brigadier General Leslie A. Purser, deputy chief of the AR, stated:

The AR has 12,000 unsatisfactory and nonparticipants [reservists]. That's part of our problem with shaping the force. That's a lot, and we need to get rid of those

guys if they are not participating in our units—so we can make room for the soldiers who want to serve. (Lopez, 2010, p. 1)

Because of the large number of UNSAT and NP soldiers, the AR is looking for ways to get rid of soldiers who do not participate during BA and ECT.

Army leaders have developed a policy to prevent noncompliant soldiers from receiving the unearned portion of their incentives. According to the AR G-1 Manning Division incentives team, termination and recoupment of incentive payments for Unsats and NPs began November 1, 2011. Any soldiers with an unexcused absence from the BA who remained unexcused for more than 90 days will have their selected reserve program incentives terminated, according to Army regulations 601-210 (B. Owens, personal communications, October 31, 2011). As the two operational campaigns, Operation Enduring Freedom and Operation Iraqi Freedom, come to a close, the AR has been working to balance the force by focusing on end strength and skill sets, and ensuring that the right numbers of soldiers are in the right jobs (Talley, Wilson, & Thomas, 2015).

On the other hand, there must be 21st-century training with senior leadership on the communication between leadership, soldiers' cognitive and affective processes, and team effectiveness (Fussell, 2015). Bressler (2010) was hopeful about the influence of a leader's psychological traits on the level of organizational commitment and turnover of Army soldiers. Finding viable solutions to reduce the number of NPs, and retain as many soldiers and their skill sets as possible, is critical.

### **Problem Statement**

There is a lack of understanding of what barriers drive AR soldiers not to attend BA and extended combat training (ECT). After the terrorist attacks of September 11, 2001, the AR has been transformed from a strategic peacetime organization to an operational force. This transformation has placed high demands on commanders and leadership in retaining soldiers. According to Marshall (2015), the Chief of AR postulated that the AR is not a strategic peacetime organization anymore. The years following the terrorist attacks, the AR experienced a significant shift to perform critical capabilities for the Army while supporting the challenging missions in Iraq and Afghanistan. Since 2001, there have been over 200,000 AR personnel supporting the various operations in Iraq and Afghanistan (Talley, 2012).

The specific problem was the gap that exists in the literature about AR soldiers in understanding the potential root causes, such as communication, implementation, and chain of command. As Talley (2014) posited, “In view of the AR end strength goal, command teams must reevaluate the over 9,000 soldiers who are currently nonparticipants (NPs) and unsatisfactory (Unsat) soldiers. Leaders must be relentless in the recovery and retention of these soldiers” (p. 2). The themes achieved from this phenomenological study serve to enlighten the strategic, operational, and tactical leadership, staff, and soldiers in the AR to find out why soldiers choose not to participate in mandatory BA and extended combat training (ECT).

### **Purpose of the Study**

The purpose of this phenomenological qualitative study was to determine the themes concerning the potential root causes of nonparticipation in the AR. Despite the research showing unacceptable high levels of nonparticipation in the AR, a gap exists in the literature about AR soldiers in understanding the potential root causes (e.g., communications, implementation, and chain of command). This qualitative study was designed to address the problem of the study through dialogue shaped by interviewing 20 participants, or until saturation was reached in the 3d MCDS. I sought to discover why soldiers choose not to participate in mandatory monthly BA and ECT.

### **Research Question**

I sought to answer the following research question in this study: What barriers drive soldiers not to attend battle assembly and extended combat training in the U.S. Army Reserve?

### **Theoretical Framework for the Study**

The theoretical framework for this study consisted of Herzberg's motivation-hygiene theory (Herzberg, 1965) and Maslow's (1943) hierarchy of needs theory. Using these theories, social scientists can identify what causes satisfaction and dissatisfaction in a working environment (Herzberg, 1965). According to Herzberg, Mausner and Snyderman (1993), Herzberg is one of the greatest original thinkers in management and motivation theory, and described the lead to being pleased with a job as *motivators* and the lead to being displeased with a job as *hygiene* (Herzberg et al., 1993). Herzberg (1974) postulated, "We can expand by stating that the job satisfiers deal with the

involved in doing the job, whereas the job dissatisfiers deal with that define the job context” (p. 18). In developing motivation-hygiene theory, Herzberg expanded on Maslow’s hierarchy of needs theory by dividing worker motivation into two key aspects (which are discussed in detail in Chapter 2) and accounting for a broader notion of workplace dissatisfaction (Herzberg, 1974). I analyzed interview responses from the participants in this study to determine common motivators and hygiene themes across the chain of command.

### **Classical and Motivational Theorists**

A number of classical and motivational theorists contributed to the field of management. I followed the classical and motivational theories of scientific management, administrative principles, and motivational theories of Taylor (1911), Maslow (1943), Fayol (1949), March and Simon (1958), and Herzberg (1965). These influential theorists have laid a solid foundation with their contributions to the body of knowledge in the school of management.

### **Influential Modern Management Theorists**

Influential modern management theorists, such as Drucker (1952), Senge (1990), and Mintzberg (1994), have also contributed to the body of knowledge in the school of management. Drucker, as the founder of modern management, provided a substantial body of work in the field of human resource management. In his prolific writings, Drucker communicated the underlying topic of human-centered management systems (Cooper, 2013; Paskewich, 2014; Straub, 2013). I implemented Drucker’s body of work in the field of human resource management to help guide this phenomenological study.

In addition, I used Senge's five-fold discipline to create learning organizations in the AR. In his book *The Fifth Discipline*, Senge (1990) gained approval for the concept of the *learning organization*, concentrating on group problem solving using the systems thinking method. As a major theoretician of learning organization, Senge asserted that contemporary organizations must have the potential for adjustments to lasting changes to stay successful (Luhn, 2016; Senge, Scharmer, & Winslow, 2013a; Senge, Scharmer, & Winslow, 2013b). According to Mintzberg (as cited in Van Vliet, 2015), "Managers who don't lead are quite discouraging, but leaders who don't manage don't know what's going on. It's a phony separation that people are making between the two" (p. 1). It is imperative to train the leaders and staff to learn how to manage and lead NPs.

### **Nature of the Study**

I used a qualitative, phenomenological research design to examine ways to reduce the number of nonparticipating soldiers in an AR command. A qualitative phenomenological study was the best option, I concluded, to answer the research question. The purpose of this phenomenological qualitative study was to determine the themes concerning the potential root causes of nonparticipation in the AR. By identifying and probing themes using a phenomenological design, I was able to understand the nature and significance of the experiences of the participants in an individual setting. Analysis of the interviews from the 20 participants provided a better understanding of what barriers drive soldiers not to attend BAs and ECTs and how the chain of command is handling nonparticipation in the respondents' units.

## Definitions

*3d Medical Command (Deployment Support):* A command that is headquartered in Gillem Enclave, Forest Park, Georgia, and manages all of the AR deployable field medical units, with five brigades in 22 states (U.S. Army Reserve, 2012).

*Area of Concentration (AOC):* An Army commissioned officer's job classification (Military Authority, 2016).

*Army regulations:* Army publications that establish policies and responsibilities and prescribe the administration procedures necessary to implement policies (B. Owens, personal communication, October 31, 2011).

*Army Reserve (AR):* A Federal Reserve Force (Component 3) of the U.S. Army. Reserve soldiers perform part-time duties once a month during BAs, or two weeks for ECT (U.S. Army Reserve, 2012).

*Battle assemblies:* Soldiers train one weekend per month to practice and perfect their military skills, and maintain unit and individual readiness in the event a mobilization occurs (J. Talley, personal communication September 18, 2012).

*Brigadier General:* A one-star general officer with the pay grade of O-7 (U.S. Army Reserve, 2012).

*Chief of Army Reserve:* Senior leader for the USARC. The commanding general's rank is lieutenant general with the pay grade of O-9 (U.S. Army Reserve, 2012).

*Citizen-soldier:* A civilian who embodies the warrior mindset and culture, and is trained in the AR on a part-time basis one weekend a month and two weeks a year (U.S. Army Reserve, 2012).

*Commander's Strength Management Module (CSMM)*: It is an Army Reserve personnel product within RCMS suite which employs presentations, reports, dashboards, providing information on resource management and personnel readiness (CSMM, 2014).

*Enlisted*: A soldier who has noncommissioned service in the Army or AR in the pay grade of private (E-1) to sergeant major (E-9). (U.S. Army Reserve, 2012).

*Expiration of Term of Service (ETS)*: When an Army soldier transitioned from the military at the end of a term of obligation and service (Rally Point, 2015).

*Extended combat training*: The two weeks of continuous training performed by reserve soldiers annually (U.S. Army Reserve, 2012).

*Grounded theory*: A research method that is used to generate or discover a theory or an abstract analytical schema of the process. From the data collected, the key points are marked with a series of codes extracted from the memoing (Glaser, 2012).

*Home of Record (HOR)*: It is an administrative term used by the Army to determine specific military entitlements for the soldiers (Moy, 2016).

*Inactive Duty Training (IDT)*: Reserve component soldiers who travel over 150 miles to battle assembly can receive up to \$300.00 in travel expenses in addition to Lodging-In-Kind which is free (Rally Point, 2014).

*Lieutenant General*: A three-star general officer with the pay grade of O-9 (U.S. Army Reserve, 2012).

*Lodging-In-Kind (LIK)*: It is a Department of Defense policy to provide Reserve component soldiers who travel more than 50 miles from member's home of record to



perform inactive duty training with billeting by confirming their monthly reservations (Rally Point, 2015).

*Major General:* A two-star general officer with the pay grade of O-8 (U.S. Army Reserve, 2012).

*Military Occupational Specialty (MOS):* It is a nine digit code used in the U.S. Army to identify a specific job for soldiers (Military Information, 2013).

*Motivation-hygiene theory:* A two-factor theory of job attitudes included in the satisfier-dissatisfier theory, which was developed by Frederick Herzberg (Herzberg, 1974).

*Multiple Unit Training Assembly (MUTA):* A standard two day Reserve weekend and a soldier receive four days of pay. (Kletzing, 2016).

*Nonparticipant:* A soldier who has not participated or been excused from the BA and who has not been paid for at least 90 days (J. Talley, personal communication September 18, 2012).

*Officer:* A soldier who has commissioned service in the Army or AR in the pay grade of Second Lieutenant (O-1) to General (O-10). (U.S. Army Reserve, 2012).

*Officer in Charge:* A soldier who has commissioned service in the Army or AR, and is in charge of a specified amount of soldiers for a special project (D. Sienko, personal communication March 30, 2012).

*Operation Enduring Freedom:* The official name used by the U.S. government in a campaign for the war in Afghanistan. It was a joint effort of the United States, United Kingdom, and Afghan countries. The war ended on December 28, 2014 (CNN, 2014).

*Operation Iraqi Freedom*: A campaign for the war in Iraq. The Iraq war ended on December 18, 2011 (MacCarley, 2012).

*OPTEMPO*: A joining of the two words *operations* and *tempo*, which refers to the rate of military actions or missions (Castro & Adler, 2012).

*Qualitative research*: A research approach that provides researchers with options for conducting a nonnumeric, in-depth inquiry of qualitative, rather than quantitative, data and helps the researchers with decisions about what approach is best to use in studying their research problems (Barnham, 2015).

*Regional Level Application Software (RLAS)*: Army Reserve business software. The RLAS system handles transfers, pay, orders and other human resources transactions (Finance, 2015).

*Reserve Component Manpower System (RCMS)*: It is the data warehouse that provides decision makers with standard reports for analyzing personnel and operational readiness data by collecting sources of information from different systems (GAO Highlights, 2015).

*Retention*: The process of retaining soldiers by making them accountable to attend battle assemblies once a month (Powers, 2006).

*Tempo*: The rate of movement, or operations, during a mission (Castro & Adler, 2012).

*Unsatisfactory participant*: A soldier who has accumulated more than nine unexcused absences in a single year from battle assemblies (D. Sienko, personal communication March 30, 2012).

*U.S. Army Audit Agency*: An agency that provides objective and independent auditing services to the U.S. Army. The U.S. Army Audit Agency has conducted three separate reviews of the nonparticipation in the AR (J. Talley, personal communication September 18, 2012).

*U.S. Army Reserve Command (USARC)*: The Army entity that is responsible for Troop Program Unit soldiers throughout the continental and which has a variety of Major Subordinate Commands (U.S. Army Reserve, 2012).

### **Assumptions**

This research study was based on the following assumptions: (a) the lack of effective communication by soldiers regarding their reasons for not attending BAs has contributed to the problem of nonparticipation; (b) USARC has not transitioned as efficiently as possible to meet the increased demands of operations after the September 11, 2001, terrorists attack and, although it has exacerbated the problem of nonparticipation, the USARC effectiveness in meeting operational requirements can be improved; (c) various stakeholders (i.e., key leadership, staff, nonparticipant soldiers) have not articulated their needs as efficiently as possible, which has contributed to the problem of nonparticipation, but suggests that with increased communication of their needs, strategies for improving nonparticipation may be developed; and (d) soldiers responded honestly about their reasons for nonparticipation, which enabled constructive solutions to be drafted.

### **Scope and Delimitations**

The focus of this phenomenological qualitative study was determining why soldiers are not attending their battle assemblies, and what the leadership and staff are doing to address and mitigate the problem. The specific focus was to determine the themes concerning the potential root causes of nonparticipation in the AR.

The Regular Army, Air Force, Marines, Navy, and Coast Guard populations were excluded from this phenomenological qualitative study. I investigated the barriers that prevent soldiers from fulfilling their obligations, as well as potential motivators for improving attendance and adherence to regulations. The scope of the study was to interview 20 participants, or until saturation was reached, in the 3d Medical Command, Deployment Support (3d MCDS) subordinate commands, and included leadership, staff, and first-line leaders. Englander (2012) postulated, “The phenomenological method in human science recommends that one uses at least three participants, obviously not because one or two subjects would be too difficult for the researcher to handle in terms of their own imagination” (p. 21). Therefore, following the recommendation of Englander to interview at least three participants, I set a goal of interviewing 20 leaders, staff, and first-line leaders in 3d MCDS.

Drawing from the 20 interviews, I provided insights into potential motivators for improving attendance in other federal and state governmental agencies and Corporate America. The strategies developed for reducing the number of nonparticipants in the AR could have application in the civilian world toward supporting employee retention.

### **Limitations**

The participants of this study were restricted to soldiers in the 3d MCDS's subordinate commands. Because of the nature of this study, there were unique aspects that may not apply to the entire command. The 20 participants were speaking about a culture in which nonparticipation is a serious problem, and these findings might not conform to work or job environments in which nonparticipation is more localized and less widespread. Participants who are of a lower rank might have been influenced by the fact that I am a field grade officer at the rank of Major. I acknowledged these limitations and remained vigilant in establishing the purpose of the study with participants, and mitigating the impact of rank on participant comfort level when introducing myself through a letter asking them to participate in the interview.

### **Significance of the Study**

With this qualitative, phenomenological study, I addressed an under-researched problem of profound importance to the USARC. The research problem was the existing gap in the literature about the in understanding the potential root causes of unacceptably high levels of nonparticipation in the AR (e.g., communications, implementation, and chain of command). Using the phenomenological design method, I analyzed the responses that I received from the interviews to determine common motivators and hygiene across the chain of command. Furthermore, the lessons learned from this investigation could be relevant to the other branches of the Armed Forces (e.g., Air Force, Marines, and Navy), federal programs, and the corporate world in identifying strategies for improving employee retention.

## Summary

To retain and retrain quality soldiers in the USARC, the gap in the literature must be filled. The gap exists in the literature about the in understanding the potential root causes of unacceptably high levels of nonparticipation in the AR, such as communications, implementation, and chain of command. I investigated the barriers that prevent soldiers from fulfilling their obligations, as well as potential motivators for improving attendance and adherence to regulations. In this study, I used Herzberg's (1965) motivation-hygiene theory and Maslow's (1943) theory of motivation and hierarchy of needs, as a theoretical framework to qualitatively assess the problem from each stakeholder's perspective. I filled the gap in the literature concerning the nonparticipation problem in the AR, and ways to improve participation throughout the 3d MCDS chain of command.

Chapter 2 contains a comprehensive review of scholarly and peer-reviewed articles related to similar studies. I reviewed the literature and addressed specific areas of classical and modern management theorists, leadership, and organizational commitment, motivation-hygiene, communications and knowledge on retaining soldiers/employees.

## Chapter 2: Literature Review

### **Introduction**

The research problem I explored in this study was a gap in the literature about the potential root causes of unacceptably high levels of nonparticipation in the AR (e.g., communications, implementation, and chain of command). Other researchers have examined nonparticipation in the USARC; however, they have offered only suggestions and not solutions. Based on my review of the literature, there was a gap in the literature concerning the nonparticipation problem in the AR and improving soldiers' participation throughout the 3d MCDS chain of command. The purpose of this phenomenological qualitative study was to determine the potential root causes of nonparticipation in the AR.

This chapter begins with an overview of my literature search strategy. I then considered the key works of classical and influential modern management theorists from 1911 to the present. After doing so, I thoroughly examined the literature available on the topics related to this phenomenological study. Lastly, I reviewed scholarly and peer reviewed articles on influential modern management theorists, leadership and organizational commitment, and retention in the AR published in the past 5 years. The chapter ends with a summary of key points.

### **Literature Search Strategy**

The following databases were searched for the literature used in this study: ABI/INFORM Complete, Business Source Complete, CINAHL Plus with Full Text, EBSCO Host, Military & Government Collection, and ProQuest. The iterative search I performed using the Walden Library databases yielded over 148 scholarly and peer-

reviewed sources needed to identify the gap in the literature and understand the topic being researched. The search terms consisted of *army reserve*, *Drucker*, *leadership*, *Mintzberg*, *organizational commitment*, *phenomenological*, *retention*, and *Senge*. Sources included in this literature review are listed alphabetically in Table 1.

Table 1

*Sources Used in the Literature Review*

| Author(s)                                       | Year | Type |
|---|------|------|
| Al-Jubari, I.                                   | 2014 | J    |
| Anney, V. N.                                    | 2014 | J    |
| Barnham, C.                                     | 2015 | J    |
| Birks, M., & Mills, J.                          | 2011 | B    |
| Boddy, C. R.                                    | 2016 | J    |
| Braun, S., Peus, C., Weisweiler, S., & Frey, D. | 2013 | J    |
| Bressler, M.                                    | 2010 | J    |
| Brown, R.                                       | 2004 | J    |
| Buble, M., Juras, A., & Matic, I.               | 2014 | J    |
| Carmeli, A., Dutton, J. E., & Hardin, A. E.     | 2015 | J    |
| Castro, C. A., & Adler, A. B.                   | 2012 | J    |
| Chan, C., Fung, Y., & Chien, W.                 | 2013 | J    |
| Chi, C. G., Maier, T. A., & Gursoy, D.          | 2013 | J    |
| Chuang, S. S., Chen, K. S., & Tsai, M. T.       | 2015 | J    |
| Clarke, N., & Mahadi, N.                        | 2015 | J    |
| Cone, R. W., & Creed, R. D.                     | 2014 | J    |
| Cooper, C. L.                                   | 2013 | J    |
| Dasgupta, S. A., Suar, D., & Singh, S.          | 2014 | J    |
| Day, D.   | 2014 | B    |
| Drucker, P. F.                                  | 1952 | J    |
| Elloy, D.                                       | 2012 | J    |
| Englander, M.                                   | 2012 | J    |
| Fayol, H.                                       | 1949 | B    |
| Fussell, C.                                     | 2015 | N    |
| Glaser, B. G., & Strauss, A. L.                 | 1968 | B    |
| Gosling, J., & Mintzberg, H.                    | 2003 | J    |
| Griffith, J.                                    | 2005 | J    |

(table continues)



| Author(s)  | Year | Type |
|--|------|------|
| Griffith, J.   | 2005 | J    |
| Haeger, D. L., & Lingham, T.                         | 2013 | J    |
| Hagel, J.  | 2013 | N    |
| Harwiki, W.  | 2013 | J    |
| He, P., Murmann, S. K., & Perdue, R. R.              | 2012 | J    |
| Herzberg, F.   | 1965 | J    |
| Herzberg, F.   | 1974 | J    |
| Herzberg, F., Mausner, B., & Snyderman, N.           | 1959 | B    |
| Hines, A., & Carbone, C.                             | 2013 | J    |
| Howard, G. C.  | 2012 | J    |
| Ingram, W. E.  | 2013 | J    |
| Islam, S., & Ali, N.                                 | 2013 | J    |
| Jaaskelainen, A., & Roitto, J. M.                    | 2015 | J    |
| Johnson, K.  | 2013 | J    |
| Joullie, J. E., & Spillane, R.                       | 2015 | J    |
| Karlgaard, R.  | 2014 | J    |
| Kaur, S.   | 2013 | J    |
| Kluwer, W.   | 2012 | N    |
| Kulchmanov, A., & Kaliannan, M.                      | 2014 | J    |
| Liu, X. P., & Wang, Z. M.                            | 2013 | J    |
| Loh, J.  | 2013 | J    |
| Lopez, C. T.   | 2010 | N    |
| Luhn, A.   | 2016 | J    |
| MacCarley, M.  | 2012 | J    |
| Manen, M. V.   | 2014 | B    |
| March, J. G., & Simon, H. A.                         | 1958 | B    |
| Marshall, B., Cardon, P., Poddar, A., & Fontenot, R. | 2013 | J    |
| Marshall, T.   | 2015 | N    |
| Maslow, A.   | 1943 | B    |
| Merat, A., & Bo, D.                                  | 2013 | J    |
| Merriam, S. B.                                       | 2014 | B    |
| Meyer, J. P., & Allen, N. J.                         | 1991 | J    |
| Meyer, J. P., & Allen, N. J.                         | 1997 | B    |
| Mintzberg, H.  | 1994 | B    |
| Padilla-Diaz, M.                                     | 2015 | J    |
| Patton, M. Q.  | 2005 | B    |
| Powers, R.   | 2006 | N    |
| Rosenstein, B.                                       | 2014 | J    |
| Schimmoeller, L.                                     | 2012 | J    |

(table continues)

| Author(s)                                       | Year | Type |
|---|------|------|
| Senge, P.                                       | 1990 | B    |
| Siemsen, H., & Reschke, C. H.                   | 2013 | J    |
| Sloan, G.                                       | 2012 | J    |
| Talley, J. W.                                   | 2014 | J    |
| Talley, J. W.                                   | 2012 | J    |
| Talley, J. W., Wilson, P., & Thomas, L.         | 2015 | N    |
| Taylor, F.                                      | 1911 | B    |
| Trochim, W. M. K.                               | 2001 | B    |
| U.S. Army Reserve                               | 2012 | J    |
| Van Vliet, V.                                   | 2015 | N    |
| Zubik, T. M., Hastings, P. C., & Glisson, M. J. | 2014 | J    |

*Note.* B = book, J = journal article, and N = news article.

### **Theoretical Framework**

The theoretical framework for this qualitative phenomenological study was based on Herzberg's (1965) motivation-hygiene theory and Maslow's (1943) hierarchy of needs theory. Using these theories, social scientists can identify what causes satisfaction and dissatisfaction in a work environment. Herzberg is regarded as one of the greatest original thinkers in management and motivation theory. He described the lead to being pleased with a job as motivators and the lead to being displeased with the job as hygiene (Herzberg, 1965). Herzberg's motivation-hygiene theory was an expansion of expansion of Maslow's hierarchy of needs theory, dividing worker motivation into two key aspects and accounting for a broader notion of workplace dissatisfaction. According to Herzberg:

Another explanation which would account for this is encompassed by a theory of motivation set forth by Abraham Maslow. He proposed a theory of human motivation which suggests the following set of needs which he listed in a hierarchical order: physiological needs, safety needs, the need for belongingness and love, the need for esteem, and at the apex of human requirements, the need

for self-actualization. He further concluded that, once a lower order need is satisfied, it will no longer act as a motivator of behavior. (p. 366)

In comparison, Herzberg's (1965) idea of hygiene in the workplace, such as administrative practices, company policies, cooperative relationship with supervisors and subordinates, good working conditions, salary, and status, corresponds with the elements of Maslow's (1943) hierarchy of needs theory. The influence for both theories came from environmental conditions, employee attitudes, and their motivation; however, Herzberg suggested that there are only two factors (hygiene and motivators) that differentiate between intrinsic and extrinsic aspects of employees' job satisfaction and dissatisfaction, as compared to Maslow's five needs (Islam & Ali, 2013, p. 87).

I expanded on Herzberg's (1965) two-factor theory of job attitudes and Maslow's (1943) hierarchy of needs theory to fill the gap in the literature to provide an understanding of the potential root causes, such as communications, implementation, and chain of command, while using the research question on why NPs are not attending mandatory BAs and ECTs. In my initial review of the literature, I found extensive studies on classical and motivational theorists, influential modern management theorists, leadership and organizational commitment in organizations, and retention in the Army and AR. However, I found few studies on the nonparticipation problem in the AR and ways to improve participation throughout the chain of command.

Some established and motivational theorists have contributed to the field of management. The following established motivational theorists' scientific management, administrative principles, and motivational theories are being followed today: Taylor

(1911), Maslow (1943), Fayol (1949), Simon (1958), and Herzberg (1965). These influential theorists have set a firm foundation for their commitments to the body of knowledge in the school of management.

Frederick Winslow Taylor, an influential management theorist and founder of the modern management movement, received international acclaim for his 1911 publication, *The Principles of Scientific Management* (Bruce, 2016; Dent & Bozeman, 2014; Savino, 2016). Taylor believed that for an employer and employee to achieve success in the workplace, implementing his fundamental principles would lead to success in the organization. The fundamental principles he recommended included: (a) observe and experiment with each component of a job by applying systematic knowledge; (b) choose employees scientifically to train; (c) ensure that the manager requires that the employee is cooperating in doing the job, while implementing scientific principles of education; and (d) ensure that the leader is responsible for training the employee for the job that needs to be done (Dent & Bozeman, 2014). The principle of Taylor's theory is a template that managers in organizations can implement and have their employees work together as an effective team. Although Taylorism in its original sense is not practiced much today, his principles of scientific management have provided a significant amount of contributions for the advancement of practicing management in organizations. Taylor's principles recommended training procedures and systematic selection, while providing a way to study work place productivity, and his principles supported the concept of systematic organizational design.

Frederick Taylor and Henri Fayol are credited with being the pioneers of classical management theory, and developing management as a science. Taylor's scientific management principles, and Fayol's administrative principles, have influenced the field of management implementing motivational theories by empowering the employees to apply systematic knowledge while being trained scientifically, and rewarding employees with increased pay and incentives (Medlin & Green, 2014; Parker, 2016a; Schimmoeller, 2012). Taylor was the renowned father of Scientific Management, and he concentrated on the lower- to mid-level managers. Fayol was considered one of the earliest and influential thinkers in modern management theory, and he focused on the behavior of top-level managers (Huang, Tung, Lo, & Chou, 2013; Lamond, 2015; Peaucelle, 2016). Taylor and Fayol agreed that identifying the issues of personnel and controlling all levels of management, are the keys to success in the organization (Kitana, 2016; Prieto & Phipps, 2016). Both theorists applied scientific methods to the issues dealing with management; however, some of their approaches were different (Jain & Sullivan, 2015). Fayol viewed management in a broader perspective. Fayol's 14 administrative principles are listed in Table 2.

Table 2

*Fayol's 14 Administrative Principles*

| Administrative Principle                                      | Definition  |
|---|---|
| Division of work  | Work should be separated between the employees and groups to make sure that the effort and attention are focused on the specific section of the task.   |
| Authority   | The concepts of authority and responsibility are in a reciprocal relationship. When authority is given to leaders or managers, they are held accountable.   |
| Discipline  | It is imperative that discipline is grounded in respect and not intimidation. An organization that is driven by success requires common effort of the employees and fair enforcement of penalties for the noncompliant employees. |
| Unity of command  | Every employee should receive orders or mandates from their designated leader or manager.   |
| Unity of direction  | The entire command or organization objectives are to move toward the same direction.  |
| Subordination of individual interests to the general interest | The single interest of an individual should not take precedence over the interests of the entire organization.  |
| Remuneration  | A fair cash payment to the employees for performing services satisfactorily to reward their efforts.  |
| Centralization  | Lowering the importance of employee or individual role in their organization.   |
| Scalar chain  | The chain of command is from the highest rank position or officer to the lowest rank employee or soldier.   |
| Order   | The commander gives strict directions to be implemented and followed by subordinates.   |

(table continues)

| Administrative Principle         | Definition  |
|----------------------------------|---|
| Equity                           | All employees in the organization should be treated fairly.   |
| Stability of tenure of personnel | An effective leader and manager retain productive employees in their organization.  |
| Initiative                       | Leaders and managers should encourage their employees to seek innovative ways to identify and implement new strategies in the organization. |
| Espirit de corps                 | The leaders and managers should promote unity among the employees (Schimmoeller, 2012).   |

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Schimmoeller, L. (2012). Henri Fayol and zero tolerance policies. *Review of International Comparative Management*, 13(1), 32–34.

Herzberg (1965) and Maslow (1943) were the motivational theorists who turned theory into practice. In the mid-1950s, Maslow, a renowned psychologist, presented the belief that an individual's primary needs function as motivators. The most essential needs that motivate individuals are their physiological, safety, and social needs. To carry out a prescribed course of action to completion with satisfaction, and to reach a certain standard of enjoyment in a work environment, these essential needs should be met. After physiological, safety, and social needs are met, recognition, respect, and status need to be included, and confidence needs to come into view to serve as a motivator (Al-Aufi & Khulood, 2014; Denton & Maatgi, 2016; Kulchmanov & Kaliannan, 2014). In the 60s, Herzberg proposed a two-factor theory of motivation. His diligent and systematic inquiry disclosed that five main factors caused job satisfaction, which included achievement, recognition, work performed, responsibility, and advancement (1965). These were called

motivators because they were all identified as the actual work being done. Kulchmanov and Kaliannan (2014) postulated:

Herzberg came up with the theory of two factors, extrinsic and intrinsic that affecting the productivity of employees as a result of their job satisfaction. The extrinsic factors or also known as hygiene factors are those, whose deal with job conflict and thus lead to job dissatisfaction if they are not met. The salary package, job security, working conditions, interrelationship, the status of an employee, supervision and firm's rules, procedures and regulation are referred to those factors. However, this is minimal requirements of employee's motivation. Indeed, when extrinsic (or hygienic) factors are considered acceptable or even if they are good, it is not necessary making employee satisfied, it simply makes him 'not dissatisfied'. At this level of satisfaction, the employee is not happy enough to put extra efforts to exceed his basic, acceptable norm of productivity. Second, factors group is intrinsic, or motivation factors, which deals with job content and lead to job satisfaction. Recognition, advancement, achievement, responsibility, work itself and growth opportunity have represented these factors. When these factors do not exist in workplace employees are not dissatisfied, but they tend to be 'not satisfied', and, as a result, less motivated to be more productive. But when a firm provide these factors, employee become satisfied, and encouraged (or motivated) to put extra efforts with increased productivity as a result of fulfilling personal psychological needs of self-developing. (p. 215)



Frederick Taylor was known for being one of the first pioneers in the field of motivational research and started the epoch of modern management (Dent & Bozeman, 2014; Grachev & Rakitsky, 2013). He believed that the old system of personnel management expected leaders to be brilliant; however, he thought offering his new system of scientific management could be utilized with regular employees by pursuing a scientific method that would be better than the brilliant leaders of the old system of personnel management (Debicki, 2015; Holt, & Hvid, 2014; Kelly, 2016). Taylor implemented his management concepts through the four functions of management in an organization: planning, organizing, leading and directing, and controlling and monitoring. The four management functions are described as: (a) planning, which evaluates the present locality and where the organization should be at a later time while determining the next course of action; (b) organizing, which gives the individual power to prepare and to create maximum use of the resources necessary to accomplish the mission; (c) leading and directing of the managed operations of the employees; and (d) controlling and monitoring the organized execution of the criterion and evaluating the real performance (Dent & Bozeman, 2014). Without exception, all organizations should consider developing and implementing Taylor's four management functions to handle daily operational decisions concerning their goals, culture, communications, systems, and processes.

In comparison, Fayol's five functions and their applications can outline a similar progression, but with some distinctions (Van Vliet, 2014). The first of Fayol's five functions is to plan. According to Fayol, planning involves the entire team's active

participation in creating a plan of action (Huynh, 2016; Jinga, 2014; Van Vliet, 2014).

The supervisor participates in a component of planning, examining in detail the environment and evaluating the micro environment of the workplace through strategic planning (Goldman, Nienaber, & Pretorius, 2015; Parker, 2016b; Van Vliet, 2014). The globalized knowledge of the economy, and the presence of ubiquitous change and competition, make forecasting, planning, and strategizing key managerial activities.

The second of Fayol's (1949) functions is to organize and he believed that an organization's structure was essential, as it facilitated the optimum conduct of its business activities (Buta & Burciu, 2014; de Oliveira, Filho, Nagano, & Ferraud, 2015; Van Vliet, 2014). Organizing combines resources for an organization with pertinent human capital, financial, and material means.

The third function described by Fayol (1949) is to command. In his original writings, Fayol used the term *command* to explain a supervisor's obligation to direct and lead the team by motivating and encouraging them to take the initiative (Fayol, 1949; Laud, Arevalo, & Johnson, 2016; Meeks, 2015; Van Vliet, 2014). Fayol (1949) advocated his theory during a period of widespread industrialism when supervisors had a firm grip on how the organization was run (classical school).

Fourth in the list of five functions and their applications is to coordinate. Fayol (1949) suggested that supervisors should work together by unifying all of the organization's efforts and actions (Marx, 2016; Seymour & Hussein, 2014; Van Vliet, 2014). Unifying these efforts means that supervisors are accountable for empowering

their employees and staff. All the organizations are coordinated to preserve the synergism between activities and operations.

Finally, the fifth function offered by Fayol is to control. Fayol recognized the importance of control in an organization, and advocated that it ensures that everything is working out as expected (Fayol, 1949; Green & Twigg, 2014; Maciejczyk, 2016; Van Vliet, 2014). Control is one of the most crucial responsibilities of a supervisor; it involves appropriate leadership to ensure everything is working according to the plan and aligning with the objectives of the organization.

Herbert Simon, renowned management scholar during the 20<sup>th</sup> century, whose career extended over six decades (Brette, Lazaric, and da Silva, 2017), contributed to the decision-making theory by developing the concept of *satisfying*, which was posited first in his 1947 published book, *Administrative Behavior*. Moreover, Brown (2004) postulated that Simon divided organizational rationality for decision-making into six types: (a) objectively rational, (b) subjectively rational, (c) consciously rational, (d) deliberately rational, (e) organizational rational, and (f) personality rational. All of the definitions are in Table 3. Brette, Lazaric, and da Silva (2017) contended that Simon's decision-making theory has influenced and impacted the field of management by developing a scientific approach with reliable insights that would be highly valued and accepted by the field of management.

Table 3

*Simon's Six Kinds of Organizational Rationality*

| Organizational Rationality | Definition   |
|----------------------------|--|
| Objectively rational       | The correct behavior for maximizing given values in a given situation.   |
| Subjectively rational      | Maximizes attainment relative to the actual knowledge of the subject.  |
| Consciously rational       | To the degree that the adjustment of means to ends is a conscious process.   |
| Deliberately rational      | To the degree that the adjustment of means to the ends have been deliberately brought about (by the individual or the organization). |
| Organizational rational    | If it is oriented to the organization's goal.  |
| Personality rational       | If it is oriented to the individual's goals.   |

*Note.* Adapted from Brown, R. (2004). Consideration of the origin of Herbert Simon's theory of "satisfying" (1993–1947), *Management Decision*, 42(10), 1242.

### **Influential Modern Management Theorists**

Influential modern management theorists, such as Drucker (1952), Senge (1990), and Mintzberg (1994), have promoted views that continue to have a significant impact for the 21st century (Haeger & Lingham, 2013). These influential theorists have set a solid foundation for their contributions to the body of knowledge in the school of management. Drucker, who is often referred to as the founder of modern management, has provided a substantial body of work in the field of human resource management (Cooper, 2013); his prolific writings communicate the underlying topic of human-centered management systems (Cooper, 2013). Instead of seeing people as a cost, Drucker saw people as a

resource, (Hagel, 2013; Joulle and Spillane, 2015; Karlgaard, 2014; Peters and Reveley, 2014; Siemsen and Reschke, 2013), and he brought modern concepts to the workplace,

Rosenstein (2014) posited that Drucker was a visionary, but his daily actions and decisions influence the present. Rosenstein suggested applying the following five principles based on Drucker's life and work:

1. Diversify your efforts. Drucker lived a three-pronged career; author of more than 40 books, and writer for many publications; consultant to major corporations, nonprofits, and schools; and professor at the Drucker School in California. Ask yourself: Where can I express my talents and reach different people in different ways?
2. Develop and nurture your personal brand. The Drucker name has immediate recognition, with a reputation for quality and integrity. You know you are getting something of significance when you read his books and articles. Ask yourself: What would I like people to think when they hear my name?
3. Maintain a global outlook. There remains a worldwide readership for Drucker's work. He regularly conducted European and Asian lecture tours, and his books have been translated into many languages. Ask yourself: Where could my potential audiences be located?
4. Remain relevant. Living and working longer means that we have to remain relevant to people of all ages. Drucker nurtured his talents and abilities over the years so that he could stay in demand. Throughout his life, he engaged in self-study systems in which he intensively studied a subject for months or

years at a time, through reading and talking to experts. Ask yourself: How can I improve areas of my life that are most crucial to my ongoing success and satisfaction?

5. Create work that helps other people. Drucker built his career and reputation on work that helped other individuals, as well as organizations (2014, p. 1).

Drucker's consulting helped businesses and other institutions carry out their missions more effectively. His writings continue to be a source of inspiration for readers worldwide. Also, he had a profound impact on his students, many of whom stayed in touch with him long after their school years. Ask yourself: Who benefits from my work, and how can I reach even more people in a new and entrepreneurial way? (Rosenstein, 2014, p. 1) When individuals and organizations apply Drucker's principles, such as creating work that helps other people, it can make going to work more satisfying and successful.

In contrast, a major theoretician of learning organizations, Senge (1990) suggested that organizations of the present world must have the potential of adjustments with lasting changes to stay successful (Luhn, 2016). Senge believed that the five learning disciplines are necessary to establish a learning organization. These disciplines are: (a) personal master: as an elevated level of an expert in one subject or scope of skill, a level which compels the individual to have a long-term obligation to learning that leads to being skilled, as well as to obtaining sagacious knowledge in the field of management (Luhn, 2016, p. 12); (b) shared vision: describes discernment on how to anticipate the future by implementing pragmatic principles to the employees (Luhn, 2016, p. 12); (c)

mental models: reflect the team member's mindset and empowers the member to move in a positive direction (Luhn, 2016, p. 12); (d) team learning: states that teams can accomplish the necessary capabilities for discerning tasks to implement in the organization (Luhn, 2016, p. 12); and (e) system thinking: a systematic series of actions and understanding how things are in regard to systems while influencing one another as a whole (Luhn, 2016, p. 12). The five learning disciplines of Senge, as noted above, are components of the learning organization. Also, it is important for managers to incorporate Mintzberg's (1994) suggested five mindsets.

Gosling and Mintzberg (2003) postulated five manager mindsets, which included the following:

- Managing self, the reflective mindset: Reflective managers have a good regard for the history of their organizations, not only the solid history of the large deals and calamities, but also the daily history of the small actions that contribute to how the organization works.
2. Managing the organization, the analytical mindset: The authors used the metaphor of a manager looking down from a very high building from his office window to the streets below, seeing the view of people and being part of a system.
3. Managing context, the worldly mindset: Excellent managers can think outside of their comfort zone, to visualize the world surrounding them, and see their organization globally and not just nationally.

4. Managing relationships, the collaborative mindset: The authors posited, managers need to get beyond empowerment.
5. Managing change, the action mindset: Imagine your organization is a two-wheeled vehicle pulled by feral horses. These horses portray the aspirations, feelings, and motivations of all the team members in the organization (Gosling & Mintzberg, 2003, p. 2).

Consequently, the intention is to summon the right amount of energy for the things that need changing, as well as being cautious in maintaining a balance.

### **Literature Review Related to Key Variables and/or Concepts**

In the next section, I address leadership and organizational commitment in organizations.

#### **Leadership and Organizational Commitment**

Porter, Steers, Mowday, and Boulian (1974) initially characterized organizational commitment as regarding the overall stability of an employee's association and involvement with the organization. In 1979, Mowday, Steers, and Porter (1979) posited that commitment should have three components: (1) a solid confidence and acknowledgment of the organization's values and goals; (2) an ability to apply reasonable efforts for the interest of the organization; and (3) an unmistakable need to remain with the organization (p. 226). Organizational commitment binds the psychological connection of employees to their organization (Meyer & Allen, 1991). Employees who are devoted to their organization normally feel an association because they fit in, and feel that they comprehend the goals of the organization.



Furthermore, organizational commitment has been the focal point for researchers in various disciplines, such as sociology, psychology, human resources management, and organizational behavior (Meyer & Allen, 1997). The value that employees add to their organization tends to be determined by their work, which can indicate higher productivity in the workplace setting (Meyer & Allen, 1997). This explanation is an appropriate indication of organizational commitment, yet it offers an extensive depiction.

Meyer and Allen (1991) explained the three components of organizational commitment as affective, continuance, and normative commitment. Affective commitment identifies with the employees who want to continue to work for the organization. When an employee is affectively committed to the organization, it implies they want to continue to work, and they normally relate to the organizational objectives, sense that they are a good fit, and are fulfilled by their work (Meyer & Allen, 1997). Employees who are affectively committed are usually tremendous assets, and feel that they are a valued member of the organization. Affective commitment describes an employee's emotional connection with the goals of the organization (He, Murmann, & Perdue, 2012). Affective commitment has been positively associated with fair treatment. The skill set employees use is comprised of job challenge, participation in decision making, and improvement of competence and personal importance (Gahye, Youngsam, Froese, & Shin, 2016).

Continuance commitment identifies with employees who feel they need to remain with the organization (Meyer & Allen, 1991). With the employees that are continuance committed, the fundamental purpose behind their dedication lies in their need to stay with

the organization (Meyer & Allen, 1997). The possible purpose for expecting to stay with the organization can fluctuate. However, the fundamental reasons identify with the lack of work choices and compensation. An excellent example of continuance commitment is when employees stay with their organization because their pay and benefits will not improve if they move to another organization (Meyer & Allen, 1997). This example can turn into an issue for the organization, as employees who are continuance committed may become disengaged and dissatisfied, and withdraw from their work, but will not leave the organization.

Continuance commitment describes an emotional connection between employees and their organization because of the costs connected with leaving the organization (Meyer & Allen, 1997). Continuance commitment is an acknowledgment for the employee to stay in the organization in the wake of seeing the costs connected with leaving the organization. The analysis of continuance commitment proposes that an employee assesses the advantage of staying, against the detriment of looking for another occupation or moving to another area (Meyer & Allen, 1991).

Normative commitment identifies with the employees who feel they need to stay with the organization (Meyer & Allen, 1991). When employees are normatively committed to the organization, they feel a need to stay with the organization. Normative committed employees feel that leaving the organization could have adverse consequences, and that they may feel guilty if they left (Meyer & Allen, 1997). Explanations behind such guilt may differ, yet the employees are frequently concerned that in leaving the organization they may create a void in their knowledge, skills, and

abilities that can increase the burden of their coworkers (Meyer et al., 1997). Such emotions can, and do, negatively impact the productivity of the employees working in the organization. Normative commitment points out sentiments of commitment to stay with the organization (Meyer & Allen, 1997). Normative commitment is a result of an employee's feelings of commitment to stay with the organization. Normative commitment depends on an employee's commitment to stay based on the conviction that it is the *moral and right* thing to do (Meyer & Allen, 1991). Sawalha, Zaitouni, and Elsharif (2012) found that when the organization's mission is consistent with an employee's cultural values, it exhibits a more durable normative commitment in the organization.

Employees are the utmost essential resources of organizations. The managed productivity of an organization relies on its employees and their organizational commitment (Harwiki, 2013). When employees are satisfied with their jobs, that satisfaction reinforces performance and motivation (Browning, 2014; Deal et al., 2013), and diminishes absenteeism and turnover. There is a struggle for obtaining talent in today's world of expansion and globalization (Gartside & Sloman, 2014). Organizations are dealing with labor deficits because of demographic changes in the work environment. In this mode, retaining productive employees is becoming an essential focal point in that employee turnover can severely alter an organization because of high cost connected with the turnover rate (Mustamil, Yazdi, Syeh, & Ali, 2014). With a specific end goal to retain employees, organizations are utilizing two strategies, and trying to motivate employees by providing monetary incentives.

Spiraling compensation is proof of the way that organizations are attempting to outdo one another in attracting employees through paychecks that are generous. Secondly, organizations are concentrating on life changing approaches by creating a compelling experience through leadership that is excellent (Walden, Jung, & Westerman, 2017). Organizations ensuing this strategy frequently invest a significant amount of money for training, cultural transformation, and leadership development (Walden et al., 2017). Although organizations may pursue one or both strategies, there are no measurable or practical instructions to know which strategy to use to improve organizational commitment and retention of employees.

When the employees accept organizational commitment, they are inclined to stay with their organization, because being committed is powerful in improving job satisfaction and motivation (Johnson, 2013; Yucel, 2012). Organizational commitment contributes to reducing the number of employees who intend to quit, thus reducing turnover (Mustamil, et al., 2014). The three components of organizational commitment—*affective, continuance and normative commitment*—are likely to improve retention in an organization (Meyer & Allen, 1991). *Affective commitment* relates to the employees who want to continue to work for the organization (Casimir et al., 2014). *Continuance commitment* urges the employee to remain focused on the organization because of numerous economic and material constraints. Lastly, *normative commitment* ties the employees to the organization morally (Meyer & Allen, 1991).

Organizational commitment is the universally recognized result of empowering management methods (Elloy, 2012; Liu & Wang, 2013). Previous research proposes that

employees are more dedicated to an organization when they are allowed an “opportunity to do important and challenging work, to meet and interact with interesting people, and to learn new skills and develop as a person” (Meyer & Allen, 1997, p. 3). In comparison, the connection between organizational commitment and psychological empowerment is additionally backed by the social exchange theory, which proposes that generous deeds from managers empower employees, resulting in an increased eagerness to stay with their organization (Carter, Armenakis, Feild, & Mossholder, 2013; Chan, Nadler, & Hargis, 2015; Elloy, 2012; Li, Wei, Ren, & Di, 2015) . Leadership conduct of managers plays a critical part in employees being satisfied with their jobs and committed to the organization.

Leadership as an administration function, for the most part, is identified with human resources and social communication (Buble, Juras, & Matic, 2014; Day, 2014; Day, Fleenor, Atwater, Sturm, & McKee, 2014; Graen & Schiemann, 2013). Competent leaders and managers can motivate, influence. and empower employees to add to the success of the organization (Carmeli, Dutton, & Hardin, 2015; Clarke & Mahadi, 2015; Cummings et al., 2013; Friesen, 2013). Great human resource management drives employee loyalty and their satisfaction with the organization (Braun, Peus, Weisweiler, & Frey, 2013; Breevaart et al., 2014; Chi, Maier, & Gursoy, 2013).

Individuals in organizations arrive at the workplace from all areas of life, and they add value by bringing their skills and abilities to the team (Berson, Da’as, & Waldman, 2015). Organizational leaders realize that individuals bring these qualities of their past knowledge, and further try to mold the individuals to a state that is harmonious with the

organization's values (Chen, Lin, & Yen, 2014; Chuang, Chen, & Tsai, 2015; Hines & Carbone, 2013; Kaur, 2013; Merat & Bo, 2013). LTG Stultz and LTG Talley, former and current Chief of the AR, try to develop a culture with which the military will be able to contend (Howard, 2012). In the wake of the terrorists' attack of September 11, 2001, the National Guard and AR called up hundreds of thousands of soldiers over the course of more than 10 years. The conjectures sustaining the earlier reserve component mobilization and deployment prototypes and strategies were put to the ultimate test.

In the beginning, the observations about the Guard and Reserve mobilizations, and a series of execution of feats in Operation Iraqi Freedom and Operation Enduring Freedom, ranged from unprecedented accomplishments to not meeting functional expectations (MacCarley, 2012). Consistent with other organizations, the U.S. Army can produce a culture in which the soldiers can communicate with each other on a level based on relationships that have developed over time. The U.S. Army is a military organization with its culture in three major components: the Active Duty forces, the National Guard, and the AR forces. In operations in Iraq and Afghanistan, the U.S. Army has relied on the National Guard and AR, a conglomerate of forces from all parts of the United States, who are citizen-soldiers in most circumstances.

In operations in Iraq and Afghanistan, the U.S. Army created an operations tempo dynamic in the military, depending heavily on the AR. Also, the AR soldiers received premobilization training, and they were taught systematically to accept the doctrine into the active duty Army's values and culture, representing the acceptance of everyday assumptions, and a practical way to conceive and behave (Sloan, 2012). The active and

reserve component soldiers' perceptions of discrimination and fairness will not be the same because of the variations in their positions and culture. There are inequalities between the active duty soldier and the reserve forces soldier, and how their positions and assignments are given while on a deployment overseas. For active duty soldiers, the Army is their full-time employer for several years, or until they decide to retire after 20 years. On the other hand, citizen-soldiers serve for many reasons. Since the terrorists attack of September 11, 2001, some soldiers felt a sense of duty, while others wanted to supplement their earnings. Given the latter, there has been documented evidence that some citizen-soldiers consider their reserve duty entirely as a part-time job (Ingram, 2013). The research indicates that AR soldiers have not adapted to the active Army's values and culture, and may not be committed to this culture.

In the AR, when enlisted soldiers reach their expiration of term of service while serving on an overseas deployment, a soldier's position is not terminated until they are discharged from the deployment. Unjust treatment of AR soldiers has been a leading cause of difficulties in the retention of soldiers (MacCarley, 2012). Active duty military leaders need to take a proactive approach by acknowledging that they are aware of the unfair treatment of AR soldiers, and how it can have a damaging outcome on the continuance of a strong military (MacCarley, 2012). The unfair treatment of reservists has been addressed by Dennis McCarthy, the former Assistant Secretary of Defense for Reserve Affairs. McCarthy produced a more aligned view of the functioning of the reservists in the beginning years of the Iraq conflict. McCarthy posited, "The shift from a 'strategic reserve' to an 'operational reserve' required the active duty force to work

together with the Reserve on funding, equipping, training, and readiness requirements” (MacCarley, 2012, p. 35). At the beginning of the Iraq war, the active duty and the reserve components’ relationships got off to an uncertain start; however, as time progressed, the result of this organized effort to train and equip reservists for deployment overseas was outstanding (MacCarley, 2012). In the years following the terrorist attacks of September 11, 2001, the AR experienced a significant shift to perform critical capabilities for the Army, while supporting the challenging missions in Iraq and Afghanistan. Since 2001, there have been over 200,000 AR personnel supporting the various operations in Iraq and Afghanistan (Talley, 2012).

The functioning of subcultures is not unique to the AR and their commands. The operation of a full-time active duty force and a part-time reserve force in the U.S. Army can be compared to how a corporation uses their full-time and part-time workers. Part-time employees, whether they are seasonal workers, leased employees, or contracted workers, are usually compensated less than their full-time counterparts, and most of the time they do not qualify for benefits (Kluwer, 2013). To be more precise, temporary employees have established an attitude that in their organization, they are not treated as first-class citizens; they observe workplace unfairness, and they do not have a voice in the decision-making process that influences their position in the organization (Kluwer, 2012). There is a lack of consistency on how part-time workers think they are being treated; many workers believe that they are treated unfairly when compared to employees who work full-time (Kluwer, 2012). While temporary employees may acquire a subculture that is a little different than full-time employees, by learning social skills



appropriate to their position in the organization, the unfairness that was initially observed may be reduced.

Employers need to understand and remember that workers are inclined to discover a new culture or subculture. Leaders should consider the perspective of the seasonal workers, leased employees, and contracted workers, so that the organization can retain and conserve the human resource capital (Howard, 2012). Leaders who are committed to increasing the social skills appropriate to their employees' positions in the workplace will empower and retain excellent soldiers in the command, and outstanding employees in the workplace.

### **Retention in the U.S. Army and Army Reserve**

In previous studies, there have been inconsistent findings between turnover among military personnel and operations tempo (OPTEMPO). The numbers of military soldiers—reservists and active duty—who are choosing to leave the Army at the end of their military obligation, is great (MacCarley, 2012). According to Talley, Wilson, and Thomas (2015):

The 2015 National Defense Authorization Act (NDAA) sets the AR end strength objective at 202,000—a reduction of 3,000 soldiers from its previous end strength objective of 205,000. The current AR end strength is now 197,830—a shortage of 4,170 soldiers. The AR initiated Operation Full Court Press on July 11, 2014, to address this problem. Specifically, this initiative aims to increase accessions, reduce controllable losses such as attrition, implement procedures to proactively expedite resolution of suspension of favorable actions, increase promotion to

sergeant and staff sergeant (historically critical rank shortages in the AR), and improve soldier sponsorship and soldier care. (p. 5)

The most common reason offered for why officers and enlisted personnel are leaving the Army and AR, is the high pace of military operations or OPTEMPO. “The operations tempo is the range of military operations as measured by work hours, training exercises, temporary duty assignments, and deployments” (MacCarley, 2012, p. 35). In the early 90s, the connections of OPTEMPO as a force in retaining soldiers came forth as a phenomenon. Throughout the duration of this span, there was a decline in the size of the armed forces, as well as a lack of strategic direction (Sloan, 2012). Since the early 90s, active duty military commands have been sustaining and maintaining combat and peacekeeping missions, while continuing to support command duties with a decreased body of soldiers. The soldiers’ greater desire to leave the military may be one result of this elevated rate of operations.

Earlier research on the effect of OPTEMPO on military personnel turnover has brought forth findings that were not consistent. Previous researchers have described that service members in the Army with high OPTEMPO from 2004 to 2014 indicated that it was a reason to leave the military (Zubik, Hastings, & Glisson, 2014). On the other hand, another empirical research has revealed high OPTEMPO from 2001 to 2013 either to be directly connected to the military personnel intentions to continue their military service, or to be at least relevant to the military personnel’s career decisions (Talley, 2014). In another study, Dunn (2013) posited:

It is more effective and efficient to retain trained personnel by motivating them to remain in the service than it is to recruit and train replacements. Moreover, personnel require individual training throughout their careers. Initially, junior officers must be taught basic tactics and leadership skills. As they become more senior and assume higher level responsibilities, they must learn advanced skills ranging from organizational management techniques to national level strategy. Enlisted personnel must also progress to become effective and mature leaders and managers at higher levels. (p. 5)

Griffith (2005) provided an organizing framework for past studies of retention among AR component soldiers in the U.S. Armed Forces. Changes in the role and structure of the AR have necessitated call-ups of large numbers of reservists for recent national defense strategies. According to Griffith:

During Operation Desert Shield/Storm, more than 84,000 AR and 60,000 Army National Guard soldiers were called to active duty. These call-ups have been often unexpected and extended, disrupting the lives of the reservists and likely having negative effects on enlistment and retention of reserve soldiers. Yet to date, there have been few scientific studies that examine how the recent mobilizations and deployments have affected the recruitment and retention of personnel for the reserve military service. (p. 354)

Before the OPTEMPO changed after the terrorists attack on September 11, 2001, the AR was a part-time job for the citizen-soldier. Because the OPTEMPO has changed with ongoing mobilizations and deployments, the reservists experience struggles. At the

start, soldiers join the AR as a commitment or as a part-time job by serving one weekend per month and two weeks per year. The ongoing call-ups among the reservists cause conflict with postsecondary education, as well as full-time employment. Back-to-back and extended deployments can create family separations and absence from traditional roles as wife, mother, husband, or father. The more these situations cause personal distress and interpersonal conflict, the greater the motivation will be to reduce conflicts among roles by leaving the reserve service (Griffith, 2005).

### **Summary and Conclusions**

The literature review of scholarly articles provided profound insight into four different areas: (a) historical reviews on classical and motivational theorists; (b) influential modern management theorists; (c) leadership and organizational commitment; and (d) retention in the Army and AR. Several themes and contradictions appeared throughout the literature. This study foundation was established with Maslow's hierarchy of needs theory and Herzberg's motivation and hygiene theory, and controversies were revealed. Table 4 contains a summary of classical, motivation, such as Frederick Taylor's *The Principles of Scientific Management*, and influential modern management theorists, such as Peter Senge, who authored *The Fifth Discipline*. In this study, I addressed the gap(s) in the literature concerning the nonparticipant soldiers in the AR. Chapter 3 contains the research design and methodology.

Table 4

*Summary of Influential Classical, Motivational, and Modern Management Theorists*

| Year | Abbreviated findings   |
|------|--|
| 1911 | Frederick Taylor authored <i>The Principles of Scientific Management</i> .   |
| 1943 | Abraham Maslow founded need hierarchy theory and wrote <i>A Theory of Human Motivation</i> .                                     |
| 1949 | Henri Fayol identified 14 administrative principles and wrote <i>General and Industrial Management</i> .                         |
| 1952 | Peter Drucker authored <i>The Practice of Management</i> .   |
| 1958 | Herbert Simon co-authored <i>Organizations</i> with James March.   |
| 1959 | Frederick Herzberg developed motivation-hygiene theory organizational dynamics.  |
| 1990 | Peter Senge authored <i>The Fifth Discipline</i> .   |
| 1994 | Henry Mintzberg authored <i>The Rise and Fall of Strategic Planning: Re-conceiving the Roles for Planning, Plans, Planners</i> . |

## Chapter 3: Research Method

### **Introduction**

The purpose of this phenomenological qualitative study was to determine the potential root causes of nonparticipation in the AR. Although some research has been conducted on the unacceptably high levels of nonparticipation in the AR, a gap remained in the literature about communications, implementation, and chain of command. The potential root causes are based on the lived experiences of leadership, staff, and first-line leaders. Other researchers have explored the nonparticipation problem in the USARC; however, those studies have offered only suggestions and not solutions. This phenomenological qualitative study (Manen, 2014; Merriam, 2014) was designed to address the problem of the study through dialogue shaped by interviewing 20 participants or until saturation was reached in 3d MCDS. I sought to discover why soldiers choose not to participate in mandatory monthly BAs and ECTs.

In Chapter 1, I established the importance of this qualitative phenomenological study. I also reviewed scholarly and peer-reviewed articles and identified the gap that exists in the literature. As I substantiate in this chapter, a phenomenological study design is appropriate when the intent is to move beyond description toward the discovery of themes that enlighten the strategic, operational, tactical leadership, staff, and first-line leaders, particularly for a study that aspires to promote positive social change and collective flourishing. Chapter 3 includes a discussion of my approach, as well as a description of the research design and rationale. In this chapter, I explain why qualitative

research method was chosen over quantitative and mixed method. In addition, I detail why I used qualitative phenomenological study methodology in this study.

### **Research Design and Rationale**

In this study, I sought to identify the themes related to lack of participation by AR soldiers in mandatory monthly BAs. I also examined the accountability of leadership for these absences. I sought to answer the following research question: What barriers drive soldiers not to attend battle assemblies and extended combat training in the U.S. Army Reserve?

Quantitative research is used to identify relationships between known variables whereas qualitative research is used when the variables involved are not known or understood (Barnham, 2015). I considered several qualitative research designs for this study, including narrative, case study, and grounded theory. Patton (2005) posited that a researcher conducting a narrative analysis focuses on exploring one or more individuals by conducting interviews and analyzing documents. Although a narrative design would provide an in-depth understanding of the experiences of a few participants, such design would not help to explain the nonparticipant behavior. A case study is bound by time or place; researchers conducting case studies typically incorporate multiple sources of data to obtain in-depth understanding about a single case or a few cases that can inform a problem (Wahyuni, 2012). To develop a theory grounded in data, a grounded theory study was suggested; however, it lacked the lived experiences of the participants. Grounded theory is a general methodology for developing a theory grounded in data that is systematically gathered and analyzed (Glaser, 2012). As a general research method,

grounded theory is used as a guide for the researcher in data collection using qualitative procedures for conducting the analysis. Glaser (2012) explained that, built into grounded theory methodology, is the readiness and moment to write a substantive theory and this needs to be taken in consideration as it emerges. It is not something to consider after the research is finished; however, it should be part of the grounded theory methodology.

Glaser (2012), postulated,

In doing grounded theory research, first one goes into the field and starts open coding leading to conceptualizing his/her data using the constant comparative method. The core category is discovered and selective coding starts and theoretical sampling for more data to see if the core category works. And if it does, the researcher starts writing memos on the workings and the relevance of emerging concepts. Soon theoretical saturation of categories and their properties emerged and are memoed. (p. 2)

Initially, grounded theory was my choice; however, I chose to do a qualitative phenomenological study.

Symbolic interaction, system perspective, and system theory were additional epistemological approaches I considered. According to Patton (2002), “Symbolic interaction is a social psychological approach, and it is a perspective that places great emphasis on the importance of meaning and interpretation as essential human processes and reaction against behavior and mechanical stimulus-response psychology” (p. 112). Symbolic interactionists seek to know what understandings have been arrived at to give



meaning to how people interact with one another. Patton (2002) quoted Blumer's three major premises as being fundamental to symbolic interactionism, which include:

(a) human beings act toward things based on the meanings the things have for them, (b) the sense of things arises out of the social interaction one has with one's fellows, and (c) the meanings of things are handled in and modified through an interpretative process used by the person in dealing with the things human beings encounter. This premise reflects how people perceive, understand, and interpret their interactions with others in the world. (p. 112).

After considering symbolic interaction, system perspective, and system theory, I decided to not use these research approaches.

Next, the system perspective and system theory approach are described as being that which is greater than and different from its parts. Patton (2002) postulated, "A system cannot validly be divided into independent parts as discrete entities of inquiry because of the effects of the behavior of the parts, on the whole, depend on what is happening to the other parts" (p. 120). Patton further quoted Gharajedaghi and Ackoff, insisting that "synthetic thinking" is required to explain system behavior. Patton explained,

This kind of system thinking has profound implications for program evaluation and policy analysis where the parts are often evaluated in terms of strengths, weaknesses, and impacts with little regard for how the parts are embedded in and interdependent with the whole program or policy. (p. 121)

When using the system function, the researcher needs to explore how and why it functions as it does. The symbolic interaction, the system perspective, and the system theory were considered; however, these approaches did not encompass developing new concepts, which was a substantial aim of this qualitative study. I opted not to use these theoretical approaches.

Also, I did not choose a quantitative or mixed method approach. Tariq and Woodman (2013) depicted quantitative, qualitative, and mixed methods research approaches as a continuum toward quantitative on one side and qualitative on the opposite side. Because mixed methods research (Bernard & Bernard, 2013; Venkatesh, Brown, & Bala, 2013; Zachariadis, Scott, & Barrett, 2013) combines quantitative and qualitative approaches, it is in the middle of the continuum (Tariq et al., 2011). Quantitative designs are viewed as being more rigorous than qualitative designs; however, there are limitations. Jaaskelainen and Roitto (2015) contended that quantitative management study results are statistically critical, yet lack validity. Qualitative research designs are more perceptive to the social context (Al-Jubari, 2014). Although the quantitative design method is often accepted as having scientific rigor, studying social structures or interpersonal relationships in natural environments is different than studying physical cases (Al-Jubari, 2014).

Despite some of these qualitative approaches having the potential to examine how to reduce nonparticipation of soldiers in an USARC, I chose the phenomenological qualitative study. Phenomenology describes the essence of a lived phenomenon from the

individual perspectives of the participants, seeking to gain knowledge through these experiences and perceptions (Dasgupta, Suar, & Singh, 2014).

### **Role of the Researcher**

When a phenomenological study is chosen as the research method, the researcher is believed to be the main research instrument. Hence, because I am the main research instrument, I will consider the possibility of bracketing and bias (Chan, Fung, & Chien, 2013). Birks and Mills (2011) suggested, "Positioning yourself as a researcher means becoming aware of your philosophical preferences and methodological alignments" (p. 63). Having knowledge, as indicated by Birks and Mills (2011), helped my vigorous actions to bracket appropriately, and to keep bias from influencing the study.

I conducted interviews with the 3d MCDS's leadership, staff, and first-line leaders who attend the monthly BA. During the data collection and analysis, I remained aware of bracketing and bias toward building relationships to achieve the desired organizational outcomes. The principal participants in this study were key leadership, staff, and first-line leaders in the 3d MCDS and subordinate units.

Participation in the study was voluntary. I posted Volunteer Recruitment Fliers (see Appendix E) strategically throughout the command, and interested potential participants contacted me directly. I did not have my rank or position on the recruitment flier. No financial gain was offered to conduct this research. At the time of the study, I was not currently serving as a principal leader or as staff. In this study, I incorporated any and all actions necessary to safeguard unbiased freedom from the control. The final published dissertation will be shared with the AR by providing a copy to the Chief, AR,

the other chiefs of the Armed Forces (Reserve Component), the Army Human Research Protections Office, U.S. Army Research Institute for the Behavioral Health and Social Sciences, and my dissertation committee. Once my study has been published, the community partners and participants can request a copy of my dissertation. The requested published dissertation will be sent with a separate email apart from the semi-structured interview to protect the privacy of the participants. My dissertation committees and I were the only persons with access to the data from the interviews. Also, the participants were informed that privacy and confidentiality would be strictly enforced.

## **Methodology**

### **Participant Selection Logic**

The purpose of this phenomenological qualitative study was to determine the themes concerning the potential root causes of nonparticipation in the AR. Despite the research into unacceptable high levels of nonparticipation in the AR, a gap remained in the literature about understanding the potential root causes, such as communications, implementation, and chain of command. I chose the purposive sampling method to obtain a sample from the AR population to ensure that the qualitative study research question was addressed. The purposive sampling method was used to get views from leadership, staff, and first-line leaders concerning the potential root cause(s) as to why soldiers do not attend BA and ECT. The themes achieved from this phenomenological qualitative study were used to enlighten the strategic, operational, tactical leadership, staff, and soldiers in the AR to find out why soldiers choose not to participate in mandatory BA and ECT. I interviewed 20 participants in the 3d MCDS using the semi-structured format and

the Likert scale questions. This information was protected in the NVivo11 software under lock and key in my home office. I will destroy all material related to this study in 5 years.

### **Instrumentation**

According to the Chief of the AR, the nonparticipation of AR soldiers throughout the USARC is a critical problem, and retaining soldiers is a priority (J. Talley, personal communications, September 18, 2012). Each participant had a copy of the interview questions. The following directions and semi-structured questions were asked during the interview.

For this phenomenological study, I used one instrument (Peredaryenko & Krauss, 2013) that I created: semi-structured interview questions to answer the research question. During the telephone interviews, anonymity of the participants was protected to support straightforward responses of participants, and consequently, collected higher quality data. Several of the theoretical frameworks described in Chapter 1 were used in the development of the semi-structured interview questions. Incorporating the theoretical framework ensured that the interview questions had alternative criteria suggested, which encompassed credibility, transferability, dependability, and confirmability (Loh, 2013). In this phenomenological study, qualitative data were subjective, and the questions were open-ended and on the Likert scale, allowing participants to answer the questions without unwarranted influence from their superiors concerning their responses. I did not include controversial wording in the open-ended and Likert scale semi-structured interview questions.

### **Notes to interviewee:**

Thank you for your participation. Each participant will have a copy of the interview questions. Please do not share operationally sensitive information or any personal information that could identify an individual (e.g., name or information specific to someone's unique role in the Command). The U.S. Army Research Institute for the Behavioral and Social Sciences Survey Control Number: DAPE-ARI-AO-17-12, RCS: MILPC-3, Expires: 02/10/18. The following directions and semi-structured questions will be asked during the interview.

**Directions:** I will read each semi-structured open-ended question and you will provide your answer.

1. Demographics: Please choose one answer:
  - a. Leadership: (Commanders, CSM, 1SG)
  - b. Staff (SR HR NCO, HR SGT, G1/S1, SSA, SAA, UA, G3/S3, Training NCO, G4/ S/4, G6/S6)
  - c. First-Line Leader (AR Soldier, PLT Leader, PLT SGT)
2. What barriers prevent soldiers from attending monthly battle assemblies in the U.S. Army Reserve?
3. What barriers prevent Soldiers from attending Extended Combat Training in the U.S. Army Reserve?
4. What are some motivators to improve a soldier's attendance during battle assembly?
5. What are some motivators to improve a soldier's attendance for Extended Combat Training?

6. What currently happens when soldiers do not attend monthly battle assemblies in the U.S. Army Reserve? What happens to the nonparticipant soldier? What does the staff do? What does the chain of command do?
7. What currently happens when soldiers do not attend Extended Combat Training in the U.S. Army Reserve? What happens to the nonparticipant soldier? What does the staff do? What does the chain of command do?
8. In your opinion, how should soldier nonparticipation be handled by staff and the chain of command?
9. Are there any aspects of Army Regulation on nonparticipation that you believe could be improved? Please explain.
10. What keeps the staff (unit administrators, human resources personnel, etc.) from performing tasks to retain or recover a nonparticipant soldier?

**Directions for questions 11-14:** Read each statement carefully and decide to what extent you agree or disagree. Then, circle the number that best represents your opinion on the subject.

|                |       |         |          |                   |
|----------------|-------|---------|----------|-------------------|
| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
| 5              | 4     | 3       | 2        | 1                 |

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| 11. Are Brigade commanders enforcing Army policy on the nonparticipant soldier at the lowest level?   | 5 | 4 | 3 | 2 | 1 |
| 12. Are Battalion commanders enforcing Army policy on the nonparticipant soldier at the lowest level? | 5 | 4 | 3 | 2 | 1 |
| 13. Are Company commanders enforcing Army policy on the nonparticipant soldier at the lowest level?   | 5 | 4 | 3 | 2 | 1 |

## 14. Should new policy be written to retain and recover nonparticipant soldiers?

5 4 3 2 1

According to Padilla-Diaz (2015), “The researcher who places him or herself within the qualitative paradigm must set aside all preconceptions, judgments, or prejudices towards a particular topic to make an objective analysis of the information participants bring to an investigation” (p. 103). I implemented Padilla-Diaz’s (2015) suggestions while researching ways to close the existing gap in the literature about the in understanding the potential root causes, such as communications, implementation, and chain of command. Using the phenomenological qualitative study, I defended and supported understanding of the themes revealed in the data. Padilla-Diaz (2015) posited:

The most appropriate data collection strategy for a phenomenological research is the profound interview. Existing literature coincides in that the phenomenological interview should be open or semi-structured. These two types of interviews allow the researcher to address the phenomenon profoundly, providing a space of aperture for the informants to express their experiences in detail, approaching reality as faithfully as possible. The detailed descriptions or interpretations brought by the participant in the profound-phenomenological interview should be as representative of experienced reality as possible. (p. 104)

I ensured that the semi-structured interviews included leaders, staff, and first-line leaders in the 3d MCDS, and that the data collected was sufficient to implement this phenomenological study. Those who participated in the semi-structured interviews received an invitation to participate in the study. During the data collection, the



individual participants were asked to participate in a 45-60-minute interview via telephone. The participants were given a day and time to do the interview. I chose the purposive sampling method to obtain a sample to ensure that the research question was addressed. Padilla-Diaz (2015) posited:

The samples or participants in phenomenological research are generally chosen according to what is known as purposive sampling. Purposive sampling is characterized by the incorporation of specific criteria met by the participants at the moment of selection. (p. 104)

I used the phenomenological approach in the investigation to ascertain data and reiterate that privacy and confidentiality practices would be continued throughout the duration of the research, including the archival processes. No monetary incentive was offered for participation; however, an executive summary of the phenomenological study was provided to all participants, if requested, and sent via separate email. Offering access to the executive summary was an incentive to embolden participation.

### **Procedures for Recruitment, Participation, and Data Collection**

I strategically posted *Volunteer Recruitment* fliers throughout the Command, and interested potential participants contacted me directly. I did not have my rank or position on the recruitment flyer. No monetary payment was offered to participants to conduct this research. At the time of the study, I was not serving as a principal leader or staff.

I utilized data from the semi-structured interviews to successfully address the research question and research problem statement. The semi-structured interview questions were selected to specifically address the research question in the study. The

phenomenological qualitative data collected were used to communicate the coming forth of themes, which enlightened the strategic, operational, tactical leadership, staff, and first-line leaders in the AR, in order to find out why soldiers choose not to participate in mandatory BA and extended combat training.

The data collection, and the electronic retention of data in the computer for all the planning, management, and reporting of this phenomenological qualitative study, was maintained in agreement with specifications set by Walden University's Institutional Review Board (IRB), the Army Human Research Protections Office, the U.S. Army Research Institute for the Behavioral and Social Sciences, and the National Academy of Science Professional Practices for Scientists. I abided by all federal, state, and local laws related to the data that were collected. Once the study has been published, the participants may request to receive a copy by email. The email forwarding the published study will be sent separately to protect the privacy of all participants. I provided all the participants with contact information before their becoming actively involved in the study, and any questions or concerns they may have had were addressed in a professional and timely manner.

### **Data Analysis Plan**

The data analysis procedures complied with analytic methods, through systematic, exhaustive examination of the experiences lived by the participants (Bazely, 2013). I set aside my prejudgments and predispositions towards the phenomenon. As Yuksel and Yildirim (2015) indicated:

The phenomenological analysis starts with bracketing the researcher's subjectivity

which refers to the researcher forming an opinion beforehand and throughout the study. This process is described as 'Epoche', and it refers to setting aside the researcher's prejudgments and predispositions towards the phenomenon. This process begins with writing a complete description of the phenomenon by the researchers. (p. 10)

According to Yuksel and Yildirim (2015), there are eight steps of data analysis:

1. Horizontalizing or listing all relevant expressions: The researcher should look at all the data analysis' statements with equal value. Statements that are not relevant to the phenomena being investigated should be deleted during cleaning of the data. Once the data is clean, the remaining data is called horizons, which are the textual meaning of the phenomenon being researched.
2. Reduction of experiences to the invariant constituents: The researcher clusters the horizons into themes. Each theme should have one meaning. The phenomena reduction is described as textual language.
3. Thematic clustering to create core themes: The invariant constituents should be clustered and thematized by the researcher. The invariant constituents are horizons defined as the core themes of the experience of the phenomenon.
4. Comparison of multiple data sources to validate the invariant constituents: Themes obtained from the participants lived experiences using the data collection method interview compared to other methods (e.g., focus group interviews, field notes, or researcher observation) to verify clear representation and accuracy with the multiple data sources.

5. Constructing of individual textual descriptions of participants. By using the textual description as a narrative explaining how the participants perceive a phenomenon and the understanding of their lived experiences.
6. Construction of individual structural descriptions: This sixth step is based on imaginative variation and textual descriptions. When the researcher uses the imaginative variation, he uses his imagination on how the experience happened and then the structures are created.
7. Construction of composite structural description: The researcher writes the textual description for each participant explaining how the lived experience happened. Creating a structural description empowers the researcher to understand the participants' lived experience that is being investigated.
8. Synthesizing the texture and structure into an expression: "Researcher should create two narratives for each participant, including textual describing 'what' occurred and structural describing 'how' it occurred" (Yuksel & Yildirim, 2015, p. 11-12).

NVivo11 qualitative coding software was used for this phenomenological qualitative study. NVivo helps manage, shape, and analyze qualitative data. NVivo's streamlined look makes it easy to use (Oliveira, Bitencourt, Teixeira, & Santos, 2013; Paulus, Woods, Atkins, & Mackin, 2017). The program provides security by storing database and files together in a single file, it enables a researcher to use multiple languages, it has merged functions for team research, and it allows the researcher to easily manipulate the data and conduct searches (Oliveira et al., 2013). The NVivo

software assisted in the organization and analysis of the content of the semi-structured interview questions (Oliveira, et al., 2013). The software offers an organized workspace, query capabilities, and visualization tools from which to conduct a thorough analysis of the data collected for the study.

### **Issues of Trustworthiness**

Researchers have expressed disapproval of judging the quality of qualitative research by the traditional criteria of validity, reliability, and objectivity (Elo et al., 2014). However, according to Trochim (2001), alternative criteria for qualitative research are credibility, transferability, dependability, and confirmability.

Credibility is the qualitative alternative to internal validity. There are several approaches to obtain credibility. In one approach, the participants that are interviewed find the results of the study credible and true. In another approach, there are various observation groups, as well as other segments of the field notes, case studies, or analyzed text that can bring credibility to a phenomenological qualitative study.

Transferability is the qualitative alternative to external validity. In this phenomenological qualitative study, I selected participants to take a semi-structured interview that yielded greater and relevant information to determine the themes. Another strategy was to obtain a thick description and purposeful sampling so I could complete the findings (Anney, 2014). When I provided the inquiry in the detailed description, and the participants were selected purposively, this method assisted with the progress of transferability of the research.

Dependability is the qualitative alternate to reliability. According to Anney (2014): Dependability involves participants evaluating the findings and the interpretation and recommendations of the study to make sure that they are all supported by the data received from the informants of the study. Dependability is established using an audit trail, a code-recode strategy and stepwise replication. (p. 278)

I included the code-recode strategy, coding and recoding the data twice, and allowing at least a one-week gestation period between the coding processes. An audit trail was established which also formed confirmability of the study (Anney, 2014).

Confirmability is the qualitative alternative to objectivity. Anney (2014) argued, “Confirmability is concerned with establishing that data, and interpretations of the findings are not the figments of the researcher’s imagination, but clearly derived from the data” (p. 279). As a decision, I ensured the interpretations of the findings were derived from the data.

### **Ethical Procedures**

Ethical protection of participants was a consideration throughout the entire study. Participation was voluntary. If a participant decided to exit the study, that participant was removed immediately without penalty. In my contact information given to all participants, I clearly communicated explicit instructions for the telephonic interview processes and procedures. I obtained prior permissions from Walden University’s (IRB), Notification of Approval to Conduct Research, the Army Human Research Protections Office, and the U.S. Army Research Institute for the Behavioral and Social Sciences.

I ensured that privacy and confidentiality for the individual and their Army organization was maintained. The participants' identities were not directly or indirectly disclosed. The demographic details did not render any individual identifiable. No information was shared in a detectable format. I was the only person who accessed the data collected during the interviews. Data masking was utilized to restrict disclosure of uniquely identifiable data. All data were controlled by a biometrically encrypted state, protected by the second layer of physical security. The data were not disseminated. The data will be held for the required period of five years in the case of an audit, and then destroyed at the expiration of this required period.

### **Summary**

In this chapter, I explained the research design and rationale, as well as my role as the researcher. The purpose of detailing the methodology was to establish a rationale for the phenomenological qualitative study as being the best approach. The importance of instrumentation, data collection, and analysis were discussed in detail. Finally, I addressed issues of trustworthiness and ethical procedures for the participants in this study, noting potential concerns and referencing Walden's IRB policy and procedures. In Chapter 4, I will address the results of this phenomenological qualitative study.

## Chapter 4: Results

### **Introduction**

I designed this phenomenological qualitative study to determine the potential root causes of nonparticipation of soldiers in the AR, based on the lived experiences and perceptions of 20 participants (leadership, staff, and first-line leaders) in 3d MCDS. Study results addressed the comprehensive research question: What barriers drive soldiers not to attend BA and extended combat training in the U.S. Army Reserve? In Chapter 1, I established the importance of this qualitative phenomenological study. In Chapter 2, I reviewed scholarly and peer-reviewed articles and identified the gap that exists in the literature. In Chapter 3, I explained my research design and rationale and discussed my role in the research process. In Chapter 4, I will address the results of this phenomenological qualitative study.

### **Setting**

The 20 study participants included 17 soldiers and 3 Department of the Army (DA) civilians. There were 12 commissioned officers, 5 noncommissioned officers, and 3 DA civilians. The 20 interviews were conducted via telephone. The study participants represented subordinate units in the 3d MCDS. The subordinate units are not identified in this research study to maintain confidentiality of the participants.



### Demographics

The demographics of the 20 participants are listed in Table 5.

Table 5

*Demographics of Participants*

| Participant    | Rank/Pay grade            | Position          |
|----------------|---------------------------|-------------------|
| Participant 1  | Major (O4)                | Staff             |
| Participant 2  | Major (O4)                | Leadership        |
| Participant 3  | Staff Sergeant (E6)       | First-Line Leader |
| Participant 4  | Colonel (O6)              | Leadership        |
| Participant 5  | First Sergeant (E8)       | Leadership        |
| Participant 6  | First Lieutenant (O2)     | First-Line Leader |
| Participant 7  | Lieutenant Colonel (O5)   | Leadership        |
| Participant 8  | Colonel (O6)              | Leadership        |
| Participant 9  | Colonel (O6)              | Leadership        |
| Participant 10 | DA Civilian (GS-7)        | Staff             |
| Participant 11 | DA Civilian (GS-7)        | Staff             |
| Participant 12 | Captain (O3)              | Staff             |
| Participant 13 | Major (O4)                | Leadership        |
| Participant 14 | Master Sergeant (E8)      | Staff             |
| Participant 15 | DA Civilian (GS-7)        | Staff             |
| Participant 16 | Captain (O3)              | Leadership        |
| Participant 17 | Sergeant First Class (E7) | First-Line Leader |
| Participant 18 | Major (O4)                | Leadership        |
| Participant 19 | Sergeant (E5)             | Staff             |
| Participant 20 | Major                     | Leadership        |

### **Data Collection**

On March 20, 2017, I received an e-mail from Walden University's IRB Chair, Dr. Leilani Endicott, confirming receipt of the approval letter by the Department of the Army Office of the Surgeon General's Army Human Research Protections Office (AHRPO). The e-mail served as my notification that my doctoral proposal and IRB application had been approved (IRB approval # 09-30-16-0113124, expiring on September 29, 2017; see Appendix C).

I was given permission by the second community partner via a Letter of Cooperation (see Appendix D) to conduct my doctoral research study with the 3d MCDS personnel and interview 20 participants. I was also approved to place volunteer recruitment fliers (see Appendix E) strategically throughout the command without mentioning my military rank or role, only my affiliation with Walden University.

I confirmed with the community partner that the data collected would remain entirely confidential and would not be provided to anyone without permission from Walden University's IRB. I used the Walden University's e-mail system to send the Participant Invitation (see Appendix F). The Letter of Informed Consent and the Interview Protocol (see Appendix G) were e-mailed to the 20 participants.

This phenomenological qualitative study had one comprehensive research question: What barriers drive soldiers not to attend battle assembly and extended combat training in the U.S. Army Reserve? Because of the sensitive nature of this research study (my interviewing of AR soldiers and DA civilians), I obtained three Permission Memorandums of Record (see Appendix A) from the command leadership and the

Department of the Army Office of the Surgeon General's AHRPO who concurred with Walden's IRB protocol.

I created the survey instrument. The 14 interview questions were approved and licensed in a Licensure for Study by the Pentagon's U.S. Army Research Institute for the Behavioral and Social Services (Survey Control Number: DAPE-ARI-AO-17-12, RCS: MILPC-3, expiring on February 10, 2018; see Appendix B).

### Data Analysis

The 20 interviews were conducted by telephone. I used NVivo11 qualitative coding software to analyze the qualitative data. Figure 1 includes a word cloud of the top 25 words used by the 20 participants. The word *soldier* appeared 424 times (approximately 4% of the entire interview protocol. The larger the font, the higher the frequency.



*Figure 1.* Word cloud of the top 25 words used by the participants.

The results in this phenomenological qualitative study addressed the comprehensive research question: What barriers drive soldiers not to attend BA and extended combat training in the U.S. Army Reserve? The following 10 themes emerged from analysis of responses to the 14 interview questions:

1. nonparticipation during BA;
2. nonparticipation during ECT;
3. motivation to attend BA;
4. motivation to attend ECT;
5. perceptions of leadership, staff, and first-line leaders;
6. improvements in Army Regulations on nonparticipation;
7. brigade commander's enforcement of Army Policy on nonparticipation;
8. battalion commander's enforcement of Army Policy on nonparticipation;
9. company commander's enforcement of Army Policy on nonparticipation; and
10. new policy for recovering NPs.

### **Theme 1: Nonparticipation During BA**

A majority of the participants shared their lived experiences on what barriers prevent soldiers from attending monthly BAs. I analyzed the data, and the results showed that 14% of the participants believed that family, work, and school conflicts were barriers for soldiers not attending BA. Another 12% believed the communication with the full-time staff and first-line leaders concerning specific Military Occupation Specialty/Area of Concentration (MOS/AOC) are not represented on the training schedule during BA weekend. Ten percent of the participants believed that the NP and UNSAT soldiers are not held accountable to attend BA, and when soldiers attend BA they are bored. Seventeen percent of the participants indicated why they believed what barriers prevent soldiers from attending BA:

- A combination of work/family schedule conflicts. (Participant 1, staff)
- Military schools are time consuming and it is hard to balance civilian and military responsibilities. (Participant 7, leadership)
- Trying to get time off from work. Jobs and family conflicts. (Participant 8, leadership)
- The junior soldiers are in college and may not attend because of school conflicts and taking exams. (Participant 13, leadership)
- There is a combination of factors, conflicts with work/job and school conflicts. (Participant 16, leadership)
- The AR consists of a lot of junior soldiers, and a lot of soldiers are attending college. The soldier has a conflict with college and job related issues and concerns. (Participant 18, leadership)
- Majority of the time, the junior soldiers have conflicts with their job and college. (Participant 20, leadership)

Soldiers do not want to come to BA because of supervisor and/or personal issues. The soldiers are not getting enough training specific to their MOS or AOC. (Participant 2, leadership)

- Communication between the leadership, full-time staff, and the first-line leader with the UNSAT soldier. The soldier's Army Enterprise emails are not working or functioning properly with CAC capability and with the military systems. Leadership, full-time staff, and the first-line leaders are not getting updated contact information from the UNSAT soldier. (Participant 5, leadership)
- There is not proper planning for the BA training schedule. (Participant 15, staff)
- For majority of the soldiers, it is the distance from the home of record, especially for the junior soldiers. (Participant 4, leadership)
- Communication. The home of record distance to the unit is too far. The lodging in kind program may be an issue because the UNSAT/NP soldier did

not submit the paperwork, or the unit may not have the funds. (Participant 11, staff)

- There is no accountability, and the UNSAT/NP soldier decides not to come to BA. Lack of information from the UNSAT/NP soldier when his/her contact information is not updated and they do not receive the U-Letters. (Participant 10, staff)
- The soldiers are bored with menial tasks, and nothing is keeping the soldier to be engaged, and then he/she stop coming to BA. (Participant 14, staff)
- The soldier does not have the motivation to attend BA, and the soldier may be tired of coming to the unit. (Participant 17, first-line leader)
- The soldiers are tired of being stagnant and not having nothing to do during BA. During mandatory trainings, BA is death by PowerPoint. (Participant 19, staff)

## **Theme 2: Nonparticipation During Extended Combat Training**

Nineteen percent of the participants believed that family, work, and school conflicts were barriers for soldiers not attending ECT. Additionally, 13% believed that poor time management with the leadership and staff planning the annual ECT was a factor. Another factor contributed to the nonparticipation was single soldiers not having a family care plan to take care of their child(ren). Another 13% believed that soldiers do not want to have ECT at home station in the summer, and it should be at a different location. Twenty-three percent of the participants believed that the leadership and full-time staff should discharge noncompliant soldiers by implementing the Uniform Code of Military Justice (UCMJ), the military justice system. While the lived experiences were perceived differently by majority of the participants, 18 of the participants indicated why they believe what barriers prevent soldiers from attending ECT:

- Soldiers may not attend ECT because they are in school, information about ECT is not disseminated in a timely manner, soldiers may run their own business and cannot afford to be away, and soldiers may not be confident in telling their employers that they have to be away for two weeks. Additionally, ECT has changed over the years. Whereas, before it was 2 consecutive weeks during the summer, it can now be split over several days throughout the year. (Participant 3, first-line leader)
- During ECT, the soldier cannot afford to be away from work for two weeks. (Participant 12, staff)
- The junior soldiers try to balance school and their social life. Soldier chooses college instead of ECT, and there is a conflict. (Participant 16, leadership)
- The AR consists of a lot of junior soldiers, and a lot of soldiers are attending college. The soldier has a conflict with college and job related issues and concerns. The ECT is spread out throughout the year, and this can be a conflict for the junior soldier who is attending college. The soldier has family issues and conflicts with the ECT schedule. (Participant 18, leadership)
- Majority of the time, the junior soldiers have conflicts with their jobs and college. (Participant 20, leadership)
- Poor time management, and not does not prioritize in enough time. Poor time management allocation. (Participant 1, staff)
- Lack of planning with the full-time staff. Both soldiers are in the AR in the same unit, and they have childcare problems. One soldier takes care of the children because the lack of a family care plan. (Participant 10, staff)
- Lack of planning with the full-time staff. Both soldiers are in the AR in the same unit and them childcare problems. One soldier takes care of the children because the lack of a family care plan. (Participant 11, staff)
- Soldiers do not have a family care plan which is a requirement. (Participant 14, staff)
- The soldier can perform his/her ECT at another unit, at the home station, or attend an approved conference in lieu of home station ECT. The ECT is normally the same place every year. The soldier should be offered to perform ECT at a different location to accomplish the mission. The soldier should be allowed to train with the joint services. Joint training with the Air Force,

Marines, Navy, in their different staff sections on an Air Force or Navy base. (Participant 13, leadership)

- The soldier does not like to attend ECT because it is always at home station. The ECT is always in the summer, and the soldiers take vacation time with their family. (Participant 15, staff)
- The soldiers might get a phone call from their squad leader, first-line leader, or leadership. The soldier feels like they are not cared about because no one from the unit reaches out to them. There is no accountability and no consequences for the full-time staff. The full-time staff/unit administrator does not flag the UNSAT soldiers. The leadership team, full-time staff, and first-line leaders should lead by example. (Participant 2, leadership)
- An ECT/Annual Training (AT) No Show packet should be processed immediately. Many commanders are not processing out the NP soldier for the AT No Show. (Participant 4, leadership)
- With active duty orders, the chain of command can implement UCMJ. (Participant 5, leadership)
- Leadership can implement UCMJ actions, but rarely happens. The soldier is already tracked as an UNSAT/NP. (Participant 7, leadership)
- Utilize UCMJ authority to help fix the problem. UNSAT soldiers impact the mission and it put a strain on the compliant soldiers, chain of command, full-time staff and first-line leaders. (Participant 8, leadership)
- The UCMJ can be implemented. The consequences of the UNSAT/NP soldier not attending ECT seems to be less stringent. If something drastic happens in the UNSAT/NP soldier's life, the first-line leader should let the full-time staff know to amend their orders. (Participant 9, leadership)
- UCMJ actions should be implemented. Punitive actions from the commander (Participant 17, first-line leader)

### **Theme 3: Motivation to Attend BA.**

Fifty-one percent believed that the junior soldiers should have a purpose to come to BA, and the leadership and staff should plan more engaging and fun training, specifically to the soldier's MOS or AOC. Another 9% believed that the leadership and



staff should make the soldier part of the team, and let the junior soldiers do the training on warrior tasking drills. Fifteen percent of the participants believe that the leadership, staff, and first-line leaders should know their soldiers by creating a mentorship and battle buddy program. Moreover, 14% believed that leadership need to show the soldiers that they care, and they will be flexible for a reasonable request to make up BA. Also, the soldier should be paid for completing training on-line instead of only receiving retirement points. While the lived experiences were perceived differently by the participants, all 20 participants indicated why they believe the below stated motivators can improve a soldier's attendance while performing BA:

- To motivate the soldier, the unit needs to have time management course and training to explain and break down the retirement point system. Have more ownership with personal and long-term planning towards retirement, and the financial benefits the soldier and his/her family will receive at retirement. Soldiers quickly get bored, not enough hi-tempo training to go beyond the mandatory trainings. We need to stay current with administrative, dental, and medical to be ready to be mobilized or deployed. Instead of having physical training (PT) to last for 2 hours, the PT section can include true battle skills combatants, martial arts, and self-defense training. Once a quarter, the soldiers should be allowed to go on a staff ride. (Participant 1, staff)
- Engaging and reward training experience. (Participant 4, leadership)
- Going off site to conduct training from the Reserve Center. Minimize the face to face mandatory trainings and do it on-line. (Participant 5, leadership)
- The unit needs to get the UNSAT/NP soldier actively engaged in the mandatory trainings. Activities that get the UNSAT/NP soldier actively engaged in other trainings such as combatants and self-defense. (Participant 6, first-line leader)

The soldiers need to be gainfully employed to do their job in the military with their MOS/AOC. The soldiers are sitting around doing nothing which is boring. The

soldiers need to be engaged in training that will keep him/her interested in the AR.

(Participant 8, leadership)

Having comrades in the unit. The soldier should be engaged and doing something they enjoy related to their specific MOS/AOC, but when there is nothing to do, the soldiers feel like they are wasting their time during BA. (Participant 10, staff)

- Real world training in the soldier's MOS or AOC. The soldier's unit should provide a few battle assemblies on an active duty Army hospital, G1/S1 shop with real world training. (Participant 13, leadership)
- The soldier needs to be engaged in fun training, training beyond the medial tasks but exciting training. Junior soldiers need to have classes/training in their specific MOS/AOC during BA. (Participant 14, staff)
- They need to keep the soldier actively engaged with the training that has been planned out for the BA. Have the training scheduled from home station (e.g., Fort Gordon, Georgia), an active duty post with the soldiers utilizing their MOS/AOC skills. (Participant 15, staff)
- The unit needs to provide worthwhile training during BA. The soldiers need to apply their specific MOS/AOC during BA. (Participant 16, leadership)
- More training opportunities with ADOS-RC and ADSW. Going to mandatory schools for training for a week or for a four-day BA weekend. (Participant 17, first-line leader)
- Make the soldier a part of the TEAM. (Participant 2, leadership)
- The UNSAT/NP soldier's unit have team building activities at least every quarter. (Participant 11, staff)
- The reintegration of warrior tasking drills. Let the junior soldiers take the lead in training while the senior soldiers observe. This gives the junior soldiers a sense of purpose, and the senior leadership to trust them. Let the junior soldiers and below be primary instructors, and let the E5 soldiers be the secondary instructors while supporting the junior soldiers to train the unit. (Participant 19, staff)

- Motivators to improve soldier's attendance during BA directly relate to the issues mentioned above. Thus, soldier's personal stories should be known by their first-line leaders, especially the junior soldiers. Time should be taken out to understand the reason why these soldiers joined. If they wanted to be in school, help should be given to get them in school. If they wanted to really be active duty, help should be given to get them there. If the soldiers are not coming to BA, they need to be called and notified in a week with an U-Letter so that they know that someone saw and cares that they were missing during BA. (Participant 3, first-line leader)
- The leadership, full-time staff, and first-line leaders should make every soldier have an additional duty that is related to their MOS/AOC. (Participant 18, leadership)
- Active sponsorship or assigned a battle buddy to the UNSAT/NP soldier. This will hold the UNSAT/NP soldier accountable. The leadership and full-time staff need to make BA fun, have engaging training, and the chain of command needs to show the soldier they care. (Participant 20, leadership)
- The soldier's unit being flexible for a reasonable request to make up a BA by submitting an RST forms. The AR should have the ability to pay the soldier for their on-line work. No soldier should work for free and not for retirement points only. (Participant 7, leadership)
- The soldiers need to have the support from the full-time staff, and the unit administrator need to be available for the frustrated UNSAT/NP soldier. (Participant 9, leadership)
- The soldiers need to get better communications from their first-line leaders. The unit needs to hold the soldier accountable to come to BA, and he/she should work it out with their first-line leader. The soldiers are sitting around not being engaged, and think mandatory trainings are a waste of their time. The soldier believes leadership does not care, and coming to BA is a waste of their time, and they think they can be home with their family. (Participant 12, staff)

#### **Theme 4: Motivation to Attend ECT.**

Twenty-five percent of the participants believed that the junior soldiers should have a purpose to come to ECT, and the leadership and full-time staff should plan engaging and fun training, targeting the soldiers MOS or AOC. Another 13% believed

that the leadership and staff should make the soldier part of the team, and suggested that the junior soldiers should have an opportunity to facilitate the training on warrior tasking drills. Fifteen percent of the participants believe that the leadership, staff, and first-line leaders should develop and implement a mentorship and battle buddy program.

Additionally, 22% believed that leadership needs to demonstrate to the soldiers that they care and will be flexible to adjust the ECT dates when the requests are reasonable and done timely. While the lived experiences were perceived differently by the participants, all 20 participants indicated why they believe the below-stated motivators can improve a soldier's attendance while performing ECT:

- Incorporate fun activities at the beginning, middle and the end of ECT. Include some down time/personal time for the soldier to fellowship with one another. (Participant 6, first-line leader)
- The soldiers are sitting around doing nothing which is boring. The soldiers need to be engaged in training that will keep his/her interested in the AR. The soldiers need to be gainfully employed to do their job in the military with their MOS/ AOC. (Participant 8, leadership)
- Step outside the unit and do more fun, team building activities. (Participant 10, staff)
- The unit should provide different and fun training. The unit should provide specific MOS/AOC training on an active duty post. (Participant 11, staff)
- The unit should provide real world training in the soldier's MOS or AOC. The soldier's unit should provide a few ECTs on an active duty Army hospital, G1/S1 shop with real world training. (Participant 13, leadership)
- Soldiers want to go somewhere fun (e.g., conduct training overseas), different from the home station training. Soldiers want to go to real world missions if possible and get away from home station. (Participant 14, staff)
- The leadership and full-time staff need to make ECT fun, have engaging training and the chain of command need to show the soldier they care. The

soldier should have a purpose for coming to ECT and when they are attending ECT they need to know that they belong. (Participant 20, leadership)

- We are truly part of the team that serves our country, one percent of the Nation. The soldier need to understand the overarching mission and that everyone is part of the vision. To defend against the enemy, every team member has an important role. (Participant 1, staff)
- The unit needs to make the soldier a part of the team. (Participant 2, leadership)
- The unit needs to reintegrate the warrior tasking drills. Let the junior soldiers take the lead in training while the senior soldiers observe. This gives the junior soldiers a sense of purpose and the senior leadership trusts them. Let the junior soldiers and below be the primary instructors and let the E5 soldiers be the secondary instructors while supporting the junior soldiers to train the unit. (Participant 19, staff)
- Motivators for soldiers to attend ECT would be to tell the soldiers of the ECT plan ahead of time, and not just the dates. Commands should have to be flexible for those soldiers who are in summer school or those soldiers who run their own businesses as long they have documentation. (Participant 3, first-line leader)
- The soldiers need to get better communications from their first-line leaders. The unit needs to hold the soldier accountable to come to ECT and he/she should work it out with their first-line leader. The soldier sits around not being engaged and think mandatory trainings are the waste of their time. The soldier believes leadership does not care and coming to ECT is a waste of their time and they think they can be home with their family. (Participant 12, staff)
- The chain of command, full-time staff and first-line leaders need to get to know their soldiers, and then we will know what the soldiers need. The first-line leader should reach out to the soldier beyond ECT; call them during the week and during the month. (Participant 18, leadership)
- The unit should try to schedule ECT in the summer months when the junior soldiers are out of school. (Participant 4, leadership)
- Training need to be fulfilling and away from the unit's home station. (Participant 5, leadership)

- There needs to be realistic training for the soldier. The soldier does multiple home station ECTs. The unit should have more flexibility to do a fragmentary ECT. One week an event another week a different event. (Participant 7, leadership)
- The soldier should be allowed to do ECT in June and the training should be at a great location. The summer time is better for the junior and senior soldiers. Majority of the soldiers are junior and the unit should choose an ECT that does not conflict with the major holidays and should schedule ECT during the summer months. (Participant 9, leadership)
- The soldiers ECT is long and should be planned out for the 14 days. (Participant 15, staff)
- During ECT, the soldiers should have more than one option for their 2-week training. ECT for 14 days in the summer is a big problem for soldiers who are in college. Home station training is poor and there should be other options for ECT. (Participant 16, leadership)
- Going to mandatory schools for training for 1 week or for a 4-day fragmentary ECT. (Participant 17, first-line leader)

**Theme 5: Leadership, Staff, and First-Line Leaders' Perceptions.**

Thirty-two percent of the participants believed that the nonparticipant soldier be counseled by the chain of command, and after doing their due diligence, an administrative discharge proceeding should begin. Additionally, 21% believed that there should be an easy, streamlined policy that the chain of command, full-time staff, and first-line leaders must follow. Another 26% believed that the chain of command and staff should contact the UNSAT/NP to show that they care, and utilize the buddy system to make the soldier accountable. Moreover, 9% believed that the chain of command and full-time staff should develop new ways to recover the UNSAT/NP soldier. While the lived experiences were perceived differently by majority of the participants, all 20 participants stated their opinion on how a soldier's nonparticipation should be handled by the chain of command and staff:

- After three (3) UNSAT attendances in a quarter (90 days) after all the official counseling, there should be an additional 90 days, 180 days maxed. (Participant 1, staff)
- There should be an agreement between the staff and the chain of command to ensure minimum errors while processing the UNSAT packet. (Participant 5, leadership)
- The UNSAT/NP soldier should be notified by mail with a U-Letter. When an UNSAT/NP soldier miss a BA, and come to BA the next month, he/she should be counseled by his/her first-line leader and the chain of command. (Participant 6, first-line leader)
- Find out why the UNSAT/NP soldier is not attending BA. Give the UNSAT/NP two to three times not showing up, and then the unit should start the administrative process. The UNSAT/NP soldier who does not want to attend BA or ECT should be administratively processed out the unit. (Participant 9, leadership)

- The UNSAT/NP soldier needed to be counseled by the chain of command. Keep all documents of record to properly discharge. Do the counseling back to back, and to set a time to speak to the Commander before adverse actions are initiated. (Participant 10, staff)
- The UNSAT/NP soldier needs to be counseled by the chain of command. Keep all documents of record to properly discharge. Do the counseling back to back and to set a time to speak to the Commander before adverse actions are initiated. (Participant 11, staff)
- After the leadership, the first-line leader and the full-time staff do their due diligence and then proceed with the administrative process to discharge the UNSAT/NP soldier. (Participant 18, leadership)
- For the noncompliant soldier, the UNSAT administrative processing begins. (Participant 20, leadership)
- UNSAT Soldiers should be handled using the following process: (1) Soldier misses first BA, within the week the soldier should be called by the first-line leader and chain of command to find out why the soldier missed (the issue should be reasonably addressed within the command (i.e., if the soldier does not have a car, someone should be appointed to pick up the soldier.) The soldier should also receive a U-Letter within 1 week of the missed BA. (2) Soldier misses the second BA, within the week the soldier should be called by the first-line leader and the chain of command to find out why the soldier missed BA. The soldier should then receive a visit by someone from the unit/sister unit before the next BA. The soldier also receives a U-Letter within 1 week of the missed BA. (3) The soldier misses the third BA in the week; the soldier should be called by the first-line leader and the chain of command to find out why the soldier missed BA. The soldier should then receive separation paperwork within 1 month of the missed BA. A member from the Office of the Staff Judge Advocate Team should call and give the basic overview of the process. (Participant 3, first-line leader)
- Get an easy, streamlined policy that the chain of command, full-time staff, first-line leaders, and soldiers have to follow, and need to hold the full-time staff accountable with the administrative process to recover or discharge a soldier. (Participant 12, staff)
- The staff and the chain of command need to follow through on consistent policy in their unit when dealing with nonparticipation. The staff and chain of command need to follow and adhere to the administrative process while handling nonparticipation in their unit. (Participant 16, leadership)



- When a soldier is an NP, the full-time staff should contact the soldier and find out why he/she missed BA. The first-line leader and full-time staff need to communicate with the NP soldier. The unit should set up a car pool for a soldier who does not have vehicles, and the unit should ensure lodging in kind is available for the soldiers. Go back to the basics in taking care of soldiers and their families. (Participant 2, leadership)
- The staff and chain of command should encourage the first-line leader to make a good faith attempt to reach the UNSAT/NP soldier. (Participant 4, leadership)
- Reach out to the soldier and find out why he/she is not attending BA. (Participant 7, leadership)
- Find out what the issues of the UNSAT are/NP soldier. Find out is it related to family, job conflict, employee concerns, and do a fix it plan. (Participant 8, leadership)
- Utilize the buddy system, same rank or one rank up or one rank down, with at least three battle buddies on the team. (Participant 13, leadership)
- The NP soldier should be handled by the staff and chain of command. The staff and chain of command should reach out to the NP, and the soldiers need to know someone cares about them. When it is possible, the staff or first-line leader should physically go to the NP soldier's home of record or job. (Participant 14, staff)
- The leadership, full-time staff, and first-line leaders need to get to know their soldiers so they can weed out the soldiers that do not want to attend BA versus the soldiers who are going through difficult times, and the leadership, staff and first-line leaders come up with a viable solution to the problem. (Participant 19, staff)
- The full-time staff and chain of command should not focus getting the NP off the books, but they should come up with ways to recover and retain the NP. (Participant 15, staff)
- The full-time staff and chain of command should reach out to the soldier after he/she misses a BA. The full-time staff and or the chain of command get in contact with the NP/UNSAT soldier, should remind the soldier of their obligation, and counseling should be done on the soldier. (Participant 17, first-line leader)

**Theme 6. Army Regulations Improvement on Nonparticipation.**

Thirty-six percent of the participants believed that the process should be streamlined to make discharging an UNSAT/NP soldier easier. Also, 2% of the participants were not sure or were not fully aware of the process. While the lived experiences were perceived differently by some of the participants, 10 of the participants indicated why they believe the process should be streamlined to make discharging an UNSAT/NP soldier easier, and four participants were not sure or not fully aware of the process:

- A better implementation of the Army Regulations and Policies. (Participant 3, first-line leader)
- The process of getting an UNSAT/NP out the AR is too cumbersome. The processing falls on the full-time staff alone. For the commanders and first-line leaders, processing the UNSAT/NP soldier is not an easy process. Too many successive steps and not enough full-time staff to handle the UNSAT/NP population. There should not be so much legal oversight. The UNSAT packet processing time should be a shorter time. (Participant 7, leadership)
- The Army leadership needs to improve the Army Regulation. The Army Regulation needs to be more standardize at the company level. The UNSAT packet should have a checklist, and when the packet goes up the chain of command the requirement on the packet checklist must be consistent. (Participant 9, leadership)
- The process should be streamlined to make discharging an UNSAT/NP soldier easier. (Participant 10, staff)
- The process should be streamlined to make discharging an UNSAT/NP soldier easier. (Participant 11, staff)
- Make the Army Regulation streamlined, simple, and understandable from the squad leader, first-line leader, the full-time staff, and the leadership chain of command. (Participant 12, staff)

- The administrative process with the UNSAT/NP should be sent straight to the Office of the Staff Judge Advocate. There are too many levels, the battalion, brigade and division should be cut out of the process. The soldier who comes from the IRR in the first year, and attends BA a few times, there needs to be a memo to put the soldier back into the IRR. (Participant 15, staff)
- The Army Regulation should incorporate the three strike principle: (1) first missed BA, do a counseling statement; (2) second missed BA, refer the UNSAT/NP soldier to the commander; (3) third missed BA, discharge the UNSAT/NP soldier. (Participant 17, first-line leader)
- The Army Regulations are too lenient. The units wait too long to discharge an UNSAT/NP. (Participant 18, leadership)
- Not fully aware of the process. (Participant 5, leadership)
- Not fully aware of the process. (Participant 6, first-line leader)
- Not aware of the process. (Participant 13, leadership)
- Not sure. (Participant 20, leadership)

**Themes 7, 8, 9, and 10 Display the Results of the Interview Protocol-Likert Scale for Survey Questions 11-14.**

Q11: Are the Brigade commanders enforcing Army Policy on the nonparticipant soldier at the lowest level? The metrics are three participants strongly disagreed, five participants disagreed, eight participants were neutral, three participants agreed and 1 participant strongly agreed. See Table 6 for the results of the metrics.

Table 6

*Brigade Commander's Enforcement of Army Policy*

| <b>Are Brigade Commander's<br/>Enforcing Army Policy?</b> | <b>Strongly<br/>Disagree</b> | <b>Disagree</b> | <b>Neutral</b> | <b>Agree</b> | <b>Strongly<br/>Agree</b> |
|---|------------------------------|-----------------|----------------|--------------|---------------------------|
| Participant 1   |                              |                 | 3              |              |                           |
| Participant 2   | 1                            |                 |                |              |                           |
| Participant 3   |                              | 2               |                |              |                           |
| Participant 4   |                              | 2               |                |              |                           |
| Participant 5   |                              |                 | 3              |              |                           |
| Participant 6   |                              |                 | 3              |              |                           |
| Participant 7   |                              |                 |                | 4            |                           |
| Participant 8   |                              |                 |                | 4            |                           |
| Participant 9   |                              |                 | 3              |              |                           |
| Participant 10  |                              |                 | 3              |              |                           |
| Participant 11  |                              |                 | 3              |              |                           |
| Participant 12  |                              | 2               |                |              |                           |
| Participant 13  |                              |                 | 3              |              |                           |
| Participant 14  | 1                            |                 |                |              |                           |
| Participant 15  |                              | 2               |                |              |                           |
| Participant 16  |                              | 2               |                |              |                           |
| Participant 17  |                              |                 |                |              | 5                         |
| Participant 18  |                              |                 |                | 4            |                           |
| Participant 19  | 1                            |                 |                |              |                           |
| Participant 20  |                              |                 | 3              |              |                           |
| <b>Total Scores</b>                                       | <b>3</b>                     | <b>5</b>        | <b>8</b>       | <b>3</b>     | <b>1</b>                  |

Q12: Are the Battalion commanders enforcing Army Policy on the nonparticipant soldier at the lowest level? The metrics are three participants strongly disagreed, four participants disagreed, nine participants were neutral, three participants agreed, and one participant strongly agreed, See Table 7 for the results of the metrics.

Table 7

*Battalion Commander's Enforcement of Army Policy*

| <b>Are Battalion Commander's enforcing army policy?</b> | <b>Strongly Disagree</b> | <b>Disagree</b> | <b>Neutral</b> | <b>Agree</b> | <b>Strongly Agree</b> |
|---|--------------------------|-----------------|----------------|--------------|-----------------------|
| Participant 1   |                          |                 | 3              |              |                       |
| Participant 2   | 1                        |                 |                |              |                       |
| Participant 3   |                          | 2               |                |              |                       |
| Participant 4   |                          | 2               |                |              |                       |
| Participant 5   |                          |                 | 3              |              |                       |
| Participant 6   |                          |                 | 3              |              |                       |
| Participant 7   |                          |                 |                | 4            |                       |
| Participant 8   |                          |                 |                | 4            |                       |
| Participant 9   |                          |                 | 3              |              |                       |
| Participant 10  |                          |                 | 3              |              |                       |
| Participant 11  |                          |                 | 3              |              |                       |
| Participant 12  |                          | 2               |                |              |                       |
| Participant 13  |                          |                 | 3              |              |                       |
| Participant 14  | 1                        |                 |                |              |                       |
| Participant 15  |                          |                 | 3              |              |                       |
| Participant 16  |                          | 2               |                |              |                       |
| Participant 17  |                          |                 |                |              | 5                     |
| Participant 18  |                          |                 |                | 4            |                       |
| Participant 19  | 1                        |                 |                |              |                       |
| Participant 20  |                          |                 | 3              |              |                       |
| <b>Total Scores</b>                                     | <b>3</b>                 | <b>4</b>        | <b>9</b>       | <b>3</b>     | <b>1</b>              |

Q13: Are the Company commanders enforcing Army Policy on the nonparticipant soldier at the lowest level? The metrics are three participants strongly disagreed, six participants disagreed, five participants were neutral, two participants agreed, and four participants strongly agreed. See Table 8 for the results of the metrics.

Table 8

*Company Commander's Enforcement of Army Policy*

| <b>Are Company Commander's<br/>Enforcing Army Policy?</b> | <b>Strongly<br/>Disagree</b> | <b>Disagree</b> | <b>Neutral</b> | <b>Agree</b> | <b>Strongly<br/>Agree</b> |
|---|------------------------------|-----------------|----------------|--------------|---------------------------|
| Participant 1   |                              |                 | 3              |              |                           |
| Participant 2   | 1                            |                 |                |              |                           |
| Participant 3   |                              | 2               |                |              |                           |
| Participant 4   |                              | 2               |                |              |                           |
| Participant 5   |                              |                 | 3              |              |                           |
| Participant 6   |                              | 2               |                |              |                           |
| Participant 7   |                              |                 |                |              | 5                         |
| Participant 8   |                              |                 |                | 4            |                           |
| Participant 9   |                              |                 |                |              | 5                         |
| Participant 10  |                              |                 | 3              |              |                           |
| Participant 11  |                              |                 |                |              | 5                         |
| Participant 12  |                              | 2               |                |              |                           |
| Participant 13  |                              |                 | 3              |              |                           |
| Participant 14  | 1                            |                 |                |              |                           |
| Participant 15  |                              | 2               |                |              |                           |
| Participant 16  |                              | 2               |                |              |                           |
| Participant 17  |                              |                 |                |              | 5                         |
| Participant 18  |                              |                 |                | 4            |                           |
| Participant 19  | 1                            |                 |                |              |                           |
| Participant 20  |                              |                 | 3              |              |                           |
| <b>Total Scores</b>                                       | <b>3</b>                     | <b>6</b>        | <b>5</b>       | <b>2</b>     | <b>4</b>                  |

Q14: Should new policy be written to retain and recover nonparticipant soldiers? The metrics are 1 participant strongly disagreed, one participant disagreed, one participant was neutral, six participants agreed, and 11 participants strongly agreed. See Table 9 for the results of the metrics.

Table 9

*New Policy to Retain and Recover Nonparticipants*

| Should new policy be written To retain/recover the NP? | Strongly Disagree | Disagree | Neutral  | Agree    | Strongly Agree |
|--|-------------------|----------|----------|----------|----------------|
| Participant 1  |                   |          |          |          | 5              |
| Participant 2  |                   |          |          |          | 5              |
| Participant 3  |                   |          | 3        |          |                |
| Participant 4  |                   |          |          |          | 5              |
| Participant 5  |                   |          |          |          | 5              |
| Participant 6  |                   |          |          | 4        |                |
| Participant 7  |                   |          |          | 4        |                |
| Participant 8  | 1                 |          |          |          |                |
| Participant 9  |                   |          |          |          | 5              |
| Participant 10   |                   |          |          |          | 5              |
| Participant 11   |                   |          |          |          | 5              |
| Participant 12   |                   | 2        |          |          |                |
| Participant 13   |                   |          |          |          | 5              |
| Participant 14   |                   |          |          |          | 5              |
| Participant 15   |                   |          |          |          | 5              |
| Participant 16   |                   |          |          | 4        |                |
| Participant 17   |                   |          |          | 4        |                |
| Participant 18   |                   |          |          | 4        |                |
| Participant 19   |                   |          |          | 4        |                |
| Participant 20   |                   |          |          |          | 5              |
| <b>Total Scores</b>                                    | <b>1</b>          | <b>1</b> | <b>1</b> | <b>6</b> | <b>11</b>      |

**Evidence of Trustworthiness**

Researchers have expressed disapproval of judging the quality of qualitative research by the traditional criteria of validity, reliability, and objectivity. However; according to Trochim (2001), alternative criteria for qualitative research are credibility, transferability, dependability, and confirmability. Incorporating Herzberg's (1965) motivation-hygiene theoretical framework ensured that the 14 interview questions had

alternative criteria which encompassed credibility, transferability, dependability, and confirmability (Loh, 2013). As previously discussed in Chapter 3, there were no adjustments made to the consistency of the strategies for the qualitative research.

Implementation of credibility strategies included blind emailing the Participant Invitation (see Appendix F) to the 20 participants, the Letter of Informed Consent, and the Interview Protocol (see Appendix G) approved and licensed by the U.S. Army Research Institute for the Behavioral and Social Sciences. To ensure privacy and confidentiality, the participants were not recorded during their telephone interview. The 20 participants individually received an email to review their transcript for accuracy. Member checking was a crucial component to clarify that the transcripts were accurate.

Implementation of transferability strategies included the 20 participants who took the semi-structured interview that yielded greater and relevant information to determine the 10 themes that emerged from the 14 interview questions. I implemented the thick description and purposive sampling as another strategy to complete the findings (Anney, 2014). The participants were selected purposively, and this method assisted with the progress of transferability of the research.

According to Anney (2014),

Dependability involves participants evaluating the findings and the interpretation and recommendations of the study to make sure that they are all supported by the data received from the informants of the study. Dependability is established using an audit trail, a code-recode strategy and stepwise replication. (p. 278)



NVivo11 qualitative coding software was used while I implemented the code-recode strategy, coding and recoding the data twice, allowing at least a 1-week gestation period between the coding processes. An audit trail was established that also formed confirmability of the study (Anney, 2014).

Anney (2014) argued, “Confirmability is concerned with establishing that data, and interpretation of the findings are not the figment of the researcher’s imagination, but clearly derived from the data” (p. 279). Purposive sampling method was used to get views from leadership, staff, and first-line leaders concerning the potential root cause(s) why soldiers choose not to attend BA or ECT. The 10 themes achieved from this phenomenological qualitative study were used to enlighten the strategic, operational, tactical leadership, staff, and soldiers in the AR. An established audit trail formed the confirmability of this research study. I ensured that the interpretations of the findings were derived from the data.

### **Summary**

In this chapter, I offered a detailed explanation of the results, as well as explaining the 10 themes that emerged from the 14 interview questions approved and licensed by the Pentagon’s U.S. Army Research Institute for the Behavior and Social Services (see Appendix B). The purpose of this phenomenological qualitative study was to determine what are the themes concerning the potential root causes of nonparticipation in the AR, based on the lived experiences and perceptions of 20 participants in the 3d MCDS. I provided an analysis of the demographics of participants and the comprehensive research question. Key results revealed that the participants believed that family, work, and school

conflicts were barriers for soldiers not attending BA and/or ECT. Further exploration of the participants' lived experiences and perceptions revealed that communication was not effective between the leadership, staff, and the first-line leaders with the nonparticipant soldier. Six participants agreed that new policy should be written to retain and recover nonparticipant soldiers, and 11 participants, strongly agreed that new policy should be written to retain and recover the nonparticipant soldier. In closing, I addressed the data collection, data analysis, and the results from conducting 20 interviews by telephone utilizing the NVivo11 qualitative coding software to analyze the data.

In Chapter 5, I will interpret the findings from the study as it relates to supporting a positive social change in the AR, capitalizing on working as a team while contributing to productivity in the organization, and safeguarding millions of dollars withheld from AR accounts. In summary, I will provide a recommendation for further study and will end with the conclusion.

## Chapter 5: Discussion, Conclusions, and Recommendations

### **Introduction**

The purpose of this phenomenological qualitative study was to determine the potential root causes of nonparticipation in the AR. Despite the research on unacceptable high levels of nonparticipation, a gap exists in the literature regarding communications, implementation, and chain of command. I explored the potential root causes based on the lived experiences of leadership, full-time staff, and first-line leaders.

I chose a purposive sampling method for obtaining a sample in order to address the research question. Padilla-Diaz (2015) posited the following:

The sample or participants in phenomenological research are generally chosen according to what is known as ‘purposive sampling’. Purposive sampling is characterized by the incorporation of specific criteria met by the participants at the moment of selection. (p. 104)

Twenty participants volunteered by responding to the approved Volunteer Recruitment Flier (see Appendix E) posted throughout my USARC. The interviews conducted were intended to provide the leadership, full-time staff, and first-line leaders an opportunity to explore the potential root causes based on the lived experiences of the participants and their perceptions of nonparticipant soldiers in the AR. Key results revealed that the participants believed that family, work, and school conflicts were barriers for soldiers not attending BAs and/or ECTs. Further exploration of the participants’ lived experiences and perceptions revealed that communication was not effective between the leadership, staff, and the first-line leaders and the nonparticipant

soldiers. Six participants agreed and 11 participants strongly agreed that new policy should be written to retain and recover nonparticipant soldiers.

### **Interpretation of the Findings**

The purpose of this research study was to analyze the lived experiences and perceptions of the leadership, full-time staff, and first-line leaders regarding the potential root causes for AR soldiers not attending BA and ECT. The answer to the comprehensive research question was based on the theoretical framework of Herzberg's (1965) motivation-hygiene theory and Maslow's (1943) hierarchy of needs theory. Herzberg (1974) postulated, "We can expand by stating that the job satisfiers deal with the involved in doing the job, whereas the job dissatisfiers deal with that define the job context" (p. 18). Herzberg's (1965) motivation-hygiene theory expounded on Maslow's (1943) hierarchy of needs theory, dividing worker motivation into two key aspects and accounting for a broader notion of workplace dissatisfaction. Conversely, implementing Herzberg's (1965) theoretical framework for my study, analyzing the lived experiences and perceptions of the leadership, full-time staff, and first-line leaders determined the hygiene themes and common motivators for my study.

I analyzed the responses received from the 20 participants to determine the hygiene themes and common motivators across the AR. The comprehensive question I sought to answer was, What barriers drive soldiers not to attend BA and extended combat training in the U.S. AR? Ten themes emerged from my analysis of participant responses to the 14 interview questions.

1. nonparticipation during BA;
2. nonparticipation during ECT;
3. motivation to attend BA;
4. motivation to attend ECT;
5. perceptions of leadership, staff, and first-line leaders;
6. improvements in Army Regulations on nonparticipation;
7. brigade commander's enforcement of Army Policy on nonparticipation;
8. battalion commander's enforcement of Army Policy on nonparticipation;
9. company commander's enforcement of Army Policy on nonparticipation; and
10. new policy recovering NPs.

Griffith (2005) provided an organizing framework for past studies of retention among AR component soldiers in the U.S. Armed Forces. Changes in the role and structure of the AR have necessitated call-ups of large numbers of reservists for national defense strategies (Griffith). These call-ups have often been unexpected and extended, disrupting the reservists, and having negative effects on enlistment and retention of reserve soldiers (Griffith). The ongoing call-ups among the reservists cause conflict with postsecondary education, as well as full-time employment (Griffith, p. 354). In this study, some of the participants' responses indicated that family, work, and school conflicts were barriers for soldiers not attending BA and ECT. Many participants perceived that NP and UNSAT soldiers are not being held accountable to attend BAs and ECTs and are not communicating effectively with the full-time staff and their first-line leaders.

In addition to holding NP and UNSAT soldiers accountable, it is imperative to implement Frederick Taylor's four functions of management. Frederick Taylor is known for being one of the first pioneers in the field of motivational research and for starting the epoch of modern management (Dent & Bozeman, 2014). Taylor implemented his management concepts through the four functions of management: planning, organizing, leading and directing, and controlling and monitoring within the organization (Dent & Bozeman, 2014). The four management functions are described as (a) planning, which involves evaluating the present locality and where the organization should be at a later time while determining the next course of action; (b) organizing, which gives the individual power to prepare and to create maximum use of the resources necessary to accomplish the mission; (c) leading and directing of managed operations of the employees; and (d) controlling and monitoring the organized execution of the criterion and evaluating the real performance (Dent & Bozeman, 2014). Additionally, implementing Taylor's four management functions throughout the AR chain of command can be an effective strategy to handle the daily operational decisions.

Responses from the study participants' included poor time management with the leadership and staff planning the annual ECT. Another factor that contributed to nonparticipation was single soldiers not having a family care plan to take care of their child(ren). Several participants believed that soldiers do not want to have ECT at home station in the summer, and that it should be held at a different location. The majority of the participants said that the leadership and full-time staff should discharge noncompliant soldiers by implementing the Uniform Code of Military Justice (UCMJ) in the military

system. I believe, without exception, the AR should consider developing and implementing Taylor's four management functions to handle daily operational decisions concerning their goals, culture, communications, systems, and processes.

Maslow (1943) and Herzberg (1965) were the motivational theorists who turned their theories into practice. In the mid-1950s, Maslow, a renowned psychologist, presented his belief that an individual's primary needs function as motivators (Kulchmanov & Kaliannan, 2014). The most essential needs that motivate individuals are their physiological, safety, and social needs (Kulchmanov & Kaliannan, 2014). To carry out a prescribed course of action to completion with satisfaction, and to reach a certain standard of enjoyment in a work environment, these essential needs should be met (Kulchmanov & Kaliannan, 2014). After physiological, safety, and social needs are met, recognition, respect, and status need to be included, and confidence needs to come forth to serve as a motivator (Kulchmanov & Kaliannan, 2014).

Regarding motivation to attend BAs and ECTs, 12 participants believed that the junior soldiers should have a purpose to come to BA and 5 participants stated that junior soldiers should have a purpose to come to ECT. These participants also believed that leadership and staff should plan more engaging and fun training, specifically in the soldiers' MOS or AOC. As for motivation to attend BA, three participants believed that the leadership and staff should make the soldier part of the team and should allow junior soldiers to complete the training on warrior tasking drills. In addition to motivating the soldiers to attend BA, eight of the participants believed that the leadership, staff and first-

line leaders should know their soldiers and be affectively committed to them by creating a mentorship and battle buddy program.

Meyer and Allen (1991) explained one of the components of organizational commitment as being affective. Affective commitment identifies with employees who want to continue to work for the organization. When an employee is affectively committed to the organization, it implies they want to continue to work, and they normally relate to the organizational objectives, sense that they are a good fit, and are fulfilled by their work (Meyer & Allen, 1997). Employees who are affectively committed are normally tremendous assets, and feel they are a valued member of the organization. Affective commitment describes an employee's emotional connection with the goals of the organization (He, Murmann, & Perdue, 2012). Affective commitment has been positively associated with fair treatment; the skill set the employees use, job challenge, participating in decision making, and improvement of competence and personal importance (Gahye et al., 2016).

Regarding motivation to attend ECT, four participants believed that the leadership, staff, and first-line leaders should develop and implement a mentorship and battle buddy program. Additionally, seven participants believed that leadership needs to demonstrate to the soldiers that they care, and that they will be flexible to adjust the ECT dates when the requests are reasonable and timely. Employees are the utmost essential resources of organizations. The managed productivity of an organization relies on its employees and organizational commitment (Harwiki, 2013). When employees/soldiers



are satisfied with their jobs, performance and motivation are reinforced, and absenteeism and turnover are diminished.

Herbert Simon, renowned management scholar during the 20<sup>th</sup> century, whose career extended over 6 decades (Brette, Lazaric, and da Silva, 2017), contributed to the decision-making theory by developing the concept of *satisfying*, which was posited first in his 1947 published book, *Administrative Behavior*. Moreover, Brown (2004) postulated that Simon divided organizational rationality for decision making into six types: (1) objectively rational—the correct behavior for maximizing given values in a given situation; (2) subjectively rational—maximizes attainment relative to the actual knowledge of the subject; (3) consciously rational—to the degree that the adjustment of means to ends is a conscious process; (4) deliberately rational—to the degree that the adjustment of means to an end have been deliberately brought about (by the individual or the organization); (5) organizational rational—if it is oriented to the organization's goal; and (6) personality rational—if it is oriented to the individual's goals.

The findings of this study support Simon's theory of decision-making. Seven participants believed that the nonparticipant soldier should be counseled by the chain of command, and after doing their due diligence, an administrative discharge proceeding should begin. Additionally, four participants believed that there should be an easy, streamlined policy that the chain of command, full-time staff, and first-line leaders must follow. Another five participants believed that the chain of command and staff should contact the NP/UNSAT to show that they care, and utilize the buddy system to make the

soldier accountable. Furthermore, two participants believed that the chain of command and full-time staff should develop new ways to recover the NP/UNSAT soldier.

Utilizing Herzberg's (1965) motivation-hygiene theory, social scientists can identify what causes satisfaction and dissatisfaction in a working environment. Regarding the administration and policies established by Herzberg (1965), many participants expressed their dissatisfaction with the existing Army Regulations and policies to improve the nonparticipation/unsatisfactory process in the AR. The participants believed the process should be streamlined to make discharging NP/UNSAT soldiers easier. Six participants agreed that new policy should be written to retain and recover nonparticipant soldiers, and 11 participants strongly agreed that new policy should be written to retain and recover nonparticipant soldiers.

### **Limitations of the Study**

The participants of this study were restricted to soldiers in the 3d MCDS's subordinate commands. Because of the nature of this study, it had unique aspects that may not apply to the entire command. There were 20 participants who volunteered by responding to the approved recruitment flier posted throughout my USARC. The 20 participants in this qualitative phenomenological study included 17 soldiers and 3 Department of the Army (DA) civilians. There were 12 commissioned officers, 5 noncommissioned officers, and 3 DA civilians. The 20 interviews were conducted by telephone. The interviews were intended to provide the leadership, full-time staff, and first-line leaders an opportunity to explore the potential root causes, based on their lived experiences and perceptions of nonparticipant soldiers in the AR.

### **Recommendations**

I developed a great working relationship with the community partners, and this provided an opportunity to explore other research opportunities to create new and innovative strategies for the retention of soldiers, sailors, marines, airmen, and employees in a corporate setting (Brocke & Lippe, 2015). A future study on reducing the number of nonparticipants can be implemented with the Air Force Reserve, The Marine Reserve, and Navy Reserve with a larger participant pool so that the results can be based on qualitative and/or quantitative results.

### **Implications**

Understanding the experiences and perceptions of leadership, full-time staff, and first-line leaders is needed to find out why soldiers choose not to participate in mandatory BA and ECT. Training the leadership, staff, and first-line leaders in the AR will support a positive change capitalizing on working as a team, while contributing to productivity in the organization, and safeguarding millions of dollars withheld from AR accounts.

Furthermore, the lessons learned from this study could be relevant to the other branches of the Armed Forces, such as the Air Force, Marines, and Navy, federal programs, and the corporate world, in identifying strategies for improving employee retention. Results were disseminated to the community partners: the Command Leadership at 3d MCDS, the Department of the Army Office of the Surgeon General, and the Pentagon's U.S. Army Research Institute for the Behavioral and Social Sciences, which approved and licensed the research survey instrument.

## Conclusion

The Army and AR leadership have been looking for ways to reduce the number of nonparticipant soldiers in the AR for several years. All soldiers in the AR—enlisted and officers—must be held accountable for attending mandatory battle assemblies once a month, and extended combat training for 14 days annually. The U.S. Army Audit Agency has conducted three separate reviews of the nonparticipants in the AR. The latest review occurred in January 2012, and was briefed to the Secretary of the U.S. Army, the Honorable John McHugh. McHugh was critical of the AR's efforts to remove nonparticipant (NP) and unsatisfactory (UNSAT) participants from the units. The report conclusions indicated that the AR could save as much as \$150.4 million with more assertive actions to resolve the problem of NPs (J. Stultz, personal communication, January 17, 2012).

More than 5 years later, the AR is still losing millions of dollars. In 2016, the U.S. Army, Chief of Staff, Major General Megan P. Tatu, awarded me the Department of the Army Lean Six Sigma (LSS) Black Belt Certification (see Appendix H). Major General Tatu stated the following:

With the enclosed certificate, the Army officially recognizes you for your hard work, enthusiasm, and commitment to improving our Army. Congratulations on being awarded the Army Lean Six Sigma Black Belt certification. Your success will enable the Army to improve processes, increase effectiveness, and reduce costs. We now solicit your efforts as a Certified Black Belt to maximize the

Army's LSS participation at all levels and to continue to execute projects that realize a significant return on investment for the Army.

At the time of this research, I was the Special Projects Officer (Major) for the 3d MCDS. As the Subject Matter Expert/Consultant for the command, I have developed a nongated Lean Six Sigma Black Belt project (Operation Possible Program Plan) to implement and help reduce the nonparticipant and unsatisfactory population throughout the division and, hopefully, within the AR. In Figure 2, there were 16 root causes as to why soldiers are nonparticipants.

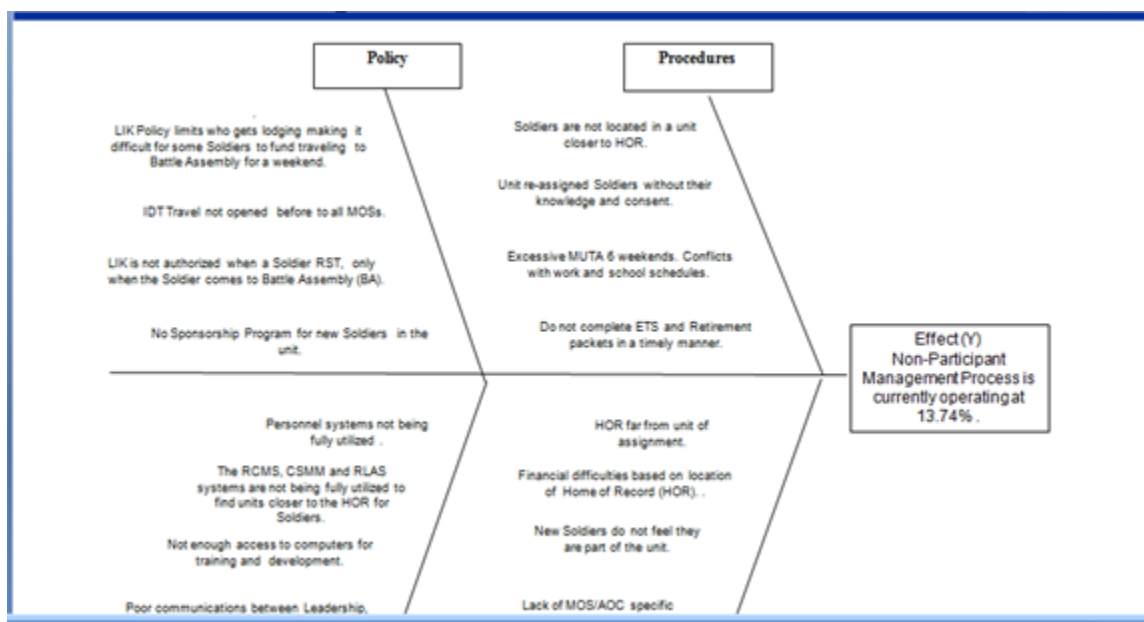


Figure 2. Cause and effect diagram.

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Appendix A: Permission Memorandum of Record



DEPARTMENT OF THE ARMY  
HEADQUARTERS, 3D MEDICAL COMMAND (DEPLOYMENT SUPPORT)

[Redacted]

AFRC-MGA-CS

12 October 2016

MEMORANDUM FOR RECORD

SUBJECT: Renata W. Hannah: Approval to Conduct a Phenomenological Qualitative Study

1. 1. Scope. I give permission for 3d Medical Command (Deployment Support) to provide support to the above referenced research via access to the following installation assets and personnel: 20 soldiers and/or civilians to volunteer as subjects.

2. Conditions of approval for Research Involving Human Subjects: If this activity is research involving human subjects, this approval is provided on the condition of, and with the understanding that, the researcher's institution will:

a. Provide to my command any human research protection program-related support necessary to implement and oversee the above referenced activity.

b. Inform me via my point of contact below regarding any relevant unanticipated problem involving risk to subjects or others, or serious or continuing noncompliance.

c. Obtain publication clearance review from my command before publishing or otherwise releasing findings from this research to members of the public.

3. Affirmation. By endorsing this request, I affirm I have determined the above-referenced activity is mission critical and will be worth the time/cost of Army support.

4. Point of contact for this action is COL [Redacted] at

[Redacted Signature]

[Redacted Name]

Major General, USAR  
Commanding



DEPARTMENT OF THE ARMY  
HEADQUARTERS, 3D MEDICAL COMMAND (DEPLOYMENT SUPPORT)

AFRC-MGA-PR

20 December 2016

MEMORANDUM FOR RECORD

SUBJECT: Renata W. Hannah: Approval to Conduct a Phenomenological Qualitative Study

1. Scope. I give permission for 3d Medical Command (Deployment Support) to provide support to the above referenced research via access to the following installation assets and personnel: 20 soldiers and/or civilians to volunteer as subjects.

2. Conditions of approval for Research Involving Human Subjects: The Deputy Chief of Staff, G-1, COL [REDACTED], will provide general interview oversight, determine the sensitivity of interview findings, and ensure that all documents are marked with the appropriate distribution/release statement and monitor any release of interview data. Inform me via COL [REDACTED] regarding any relevant unanticipated problem involving risk to subjects or others, or serious or continuing noncompliance.

3. By endorsing this request, I affirm the following:

- a. I have read the draft instrument and how it will be administered and analyzed.
- b. I have determined the above-referenced activity is mission critical and will be worth the time/cost of the personnel who will participate.
- c. I intend to take appropriate action as a result of the interview findings.
- d. I will share the responsibility for meeting the requirements outlined in the Army Focus Group/Interview application by providing available resources as appropriate to aid the researcher in meeting these requirements.
- e. I will share the responsibility for addressing publicity resulting from the focus group/interview's administration and/or release of findings by providing Public Affairs resources as available to address that publicity.

4. POC for this memorandum is COL [REDACTED] DCofS, G-1 at [REDACTED] or email: [REDACTED]@mail.mil.

[REDACTED]  
[REDACTED]  
[REDACTED]  
Brigadier General, USAR  
Deputy Commander



DEPARTMENT OF THE ARMY  
OFFICE OF THE SURGEON GENERAL

REPLY TO  
ATTENTION OF

DASG-HRPO

6 March 2017

MEMORANDUM FOR Renata Hannah, 126 Dustin Drive, Stockbridge, GA 30281  
[REDACTED]

SUBJECT: "Reducing the Nonparticipant Number in the Army Reserve: A Phenomenological Qualitative Study," PI: Renata Hannah

#### 1. Review Outcomes

The Army Human Research Protections Office (AHRPO) RPAR of the above referenced protocol is complete, and AHRPO has concurred with the Walden University Institutional Review Board's (IRB) approval of the protocol. RPAR review is required to ensure that Department of Defense (DOD) supported research involving human subjects is compliant with DOD requirements in DOD Instruction (DODI) 3216.02. DoD-supported research involving human subjects is defined as research involving human subjects for which the Department of Defense is providing at least some of the resources, including but not limited to funding, facilities, equipment, personnel (investigators or other personnel performing tasks identified in the research protocol), access to or information about DoD personnel for recruitment, or identifiable data or specimens from living individuals. It includes both DoD-conducted research involving human subjects (intramural research) and research conducted by a non-DoD institution. DOD is supporting the above referenced activity by providing access to DOD personal for recruitment.

#### 2. Requirements

**Substantive Changes to the Protocol:** The AHRPO must review and accept the IRB's determination when substantive modifications are made to this research protocol and any modifications that could potentially increase risk to subjects, before the changes are implemented to ensure compliance with the DODI 3216.02. Substantive modifications include a change in principal investigator, change or addition of an institution, elimination or alteration of the consent process, change to the study population that has regulatory implications (e.g., adding children, adding active duty population, etc.), significant change in study design (i.e., would prompt additional scientific review), or a change that could increase risks to subjects.

**Continuing Review:** The AHRPO must ensure an appropriate IRB continuing review occurred within the required timeframe. Submit communication from the IRB regarding any continuation approval or lapse in IRB approval.

**Study Closure:** The AHRPO should be informed of the date and reason for study closure (i.e., study completed, insufficient enrollment to sustain the research, etc.). The AHRPO must receive the final study report submitted to the IRB, including a copy of any acknowledgement documentation and any supporting documents, as soon as all documents become available.

DASG-HRPO

SUBJECT: "Reducing the Nonparticipant Number in the Army Reserve: A Phenomenological Qualitative Study," PI: Renata Hannah

**Notification:** The investigator should immediately notify the AHRPO of the occurrence of any of the following:

- When the IRB used to review and approve the research changes to a different IRB.
- The knowledge of any pending, on-going or completed compliance inspection/visit by the Food and Drug Administration (FDA), Office for Human Research Protections of the U.S. Department of Health and Human Services, or other government agency concerning this research, the issuance of inspection reports, FDA Form 483, warning letters, or actions taken by any regulatory agencies including legal or medical actions.
- Suspension or termination of this research study by the IRB, the institution, the sponsor, or any regulatory agency;
- Substantiated unanticipated problems involving risks to subjects or others related to this research study; and
- Substantiated serious or continuing noncompliance related to this research study.

### 3. Other Considerations

If your activity will collect or elicit individuals' attitudes, opinions, behavior and related demographic, social, and economic data, then the activity may be subject to review and approval in accordance with DOD Instruction (DODI) 1100.13, DOD Surveys and/or DOD 8810.01, Information Collection and Reporting. You may find more information about the Army Survey Approval process at the following: <https://sslweb.hqda.pentagon.mil/ari/> and <https://sslweb.hqda.pentagon.mil/ari/pdf/InstructionsforArmySurveyReviewandApprovalforWeb.pdf>. Such approval is separate and distinct from AHRPO review and approval. AHRPO acknowledges that you have already obtained survey approval from the U.S. Army Research Institute for the Behavioral and Social Sciences (Survey Control No. DAPE-ARI-AO-17-12; MILPC-3; Expires 02/10/18).

### 4. Caution

Do not construe this AHRPO memorandum as IRB approval, DOD Institutional approval, or other DOD support agreement. This review confirms only that the above reference project is deemed by AHRPO to be compliant with the requirements identified in the DODI 3218.02.


### 5. Point of Contact

The AHRPO Point of Contact for any questions regarding this report is [REDACTED], MPH, CIP at [REDACTED] or [REDACTED]@mail.mil

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED] Research Ethics and Compliance Officer  
Army Human Research Protections Office

Appendix B: Licensure for Study from U.S. Army Research Institute

6/17/2017 [View in University Mail](#) - Licensure of Reducing the Nonparticipant Number in the Army Reserve: A Phenomenological Qualitative Study



Ranata Hannah <[REDACTED]>

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**Licensure of Reducing the Nonparticipant Number in the Army Reserve: A Phenomenological Qualitative Study**  
10 messages

**[REDACTED] CIV USARMY HQDA ARI (US)** <[REDACTED]> Fri, Feb 10, 2017 at 8:44 AM  
To: Ranata Hannah <[REDACTED]>  
Cc: [REDACTED] CIV USARMY HQDA ARI (US) <[REDACTED]>

Good morning MAJ Hannah,

I thank you for your focus group interview request. We wish you well in your data collection and have provided the license below for your study, *Reducing the Nonparticipant Number in the Army Reserve: A Phenomenological Qualitative Study*. The survey control number and expiration date should be displayed on materials and in communications with potential respondents (i.e., survey invitations, consent form and/or questionnaires).

This license is conditional on obtaining IRB approval or exemption from AHRPO. Suggestions for your consideration follow.

**SURVEY APPROVAL AUTHORITY:**  
U.S. ARMY RESEARCH INSTITUTE FOR THE BEHAVIORAL AND SOCIAL SCIENCES SURVEY  
CONTROL NUMBER: DAPH-ARIAC-17-12  
KCS: MILPO:1  
EXPIRES: 02/10/18

**REQUIREMENTS:**  
-Provide documentation of AHRPO exemption/approval once obtained.

**RECOMMENDATIONS:**  
-Include a statement in your directions reminding participants not to share PI or operationally sensitive information in their responses to questions. For example: Please do not share operationally sensitive information or any personal information that could identify an individual (e.g., name or information specific to someone's unique role in the Command).  
-Consider rephrasing wording of questions #2 and #3 from "What barriers drive Soldiers not to attend...?" to "What barriers prevent Soldiers from attending...?"  
-Add an 's' to #10 so it reads: "What keep(s) this staff/joint administrators, human resources personnel, etc.) from performing tasks to retain or recruit a nonparticipant soldier?"  
-Update the question numbers "3-12" in the Directions so it reflects question numbers "11-14".

Please let me know if you have any questions or concerns. Best wishes in your data collection and completing your studies!

W/R,  
[REDACTED]  
[REDACTED]  
Research Psychologist  
U.S. Army Research Institute

abnormal:zug:com:na:u:O:U: 56kx96/V6d18:vice:ph:reel-1:bc6d:the-156222113/v:8785:u-15:47046/71725d&am#15:183201982:WebM... 1/5

Appendix C: Approval to Conduct Research from  
Walden University's Institutional Review Board

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6/11/2017

Walden University Mail - Notification of Approval to Conduct Research - Renata Hannah



Renata Hannah &lt;renata.hannah@waldenu.edu&gt;

**Notification of Approval to Conduct Research - Renata Hannah**

\* message

IRB [REDACTED]  
To: Renata Hannah <[REDACTED]>  
Cc: [REDACTED]

Mon, Mar 20, 2017 at 6:58 PM

Dear Ms. Hannah,

This email confirms receipt of the IRB approval letter for the community research partner and also serves as your notification that Walden University has approved BOTH your doctoral study proposal and your application to the Institutional Review Board. As such, you are approved by Walden University to conduct research.

Congratulations!

[REDACTED]

Research Ethics Support Specialist, Office of Research Ethics and Compliance

[REDACTED]

IRB Chair, Walden University

Information about the Walden University Institutional Review Board, including instructions for application, may be found at this link: <http://academicguides.waldenu.edu/researchcenter/irb>



## Appendix D: Letter of Cooperation From (Community Partner)



REPLY TO  
ATTENTION OF:

DEPARTMENT OF THE ARMY  
HEADQUARTERS, 3D MEDICAL COMMAND (DEPLOYMENT SUPPORT)

AFRC-MGA-PR

12 February 2017

MEMORANDUM FOR RECORD

SUBJECT: Renata W. Hannah Affiliation with Walden University and Conduct of Research Study with 3D Medical Command (Deployment Support) (MCDS) Personnel

1. Based on my review of your research proposal, and appropriate legal review, I give permission for MAJ Renata W. Hannah, researching as Ms. Hannah, to conduct the study titled Reducing the Nonparticipant's Number in the Army Reserve: A Phenomenological Qualitative Study with the 3d MCDS personnel. As part of this study, I authorize her to conduct a semi-structured interview to address the research question with 15-20 participants or until saturation is reached. I understand the proposed Walden University email will be used to reach the participants using blind-copied technique. I understand the interviews will be 45-60 minutes in length and the data will be collected by telephone and in person. Individual participants will be voluntary and at their own discretion.
2. The 3d MCDS approves Ms. Hannah to place recruitment fliers strategically throughout the command without mentioning her rank or role, only her affiliation with Walden University. We reserved the right to withdraw from the study at any time if our circumstances change.
3. I confirm that I am authorized to approve research in this setting and that this plan complies with the organization's policies. I understand that the data collected will remain entirely confidential and may not be provided to anyone outside of the student's supervising staff without permission from the Walden University IRB.
4. Point of contact for this memorandum is the undersigned at [REDACTED] or email: [REDACTED]

[REDACTED]  
[REDACTED]  
SONIA M. CROWLEY  
COL, MS  
Deputy Chief of Staff, G-1

Appendix E: Volunteer Recruitment Flier

## VOLUNTEERS NEEDED FOR RESEARCH STUDY!

### Reducing the Nonparticipant Number in the Army Reserve: A Phenomenological Qualitative Study

Researcher needs current and former Commanders, Sergeant Majors, First Sergeants, Full Time Staff G1/S1, G3/S3, G4/S4, and G6/S6 and First Line Leaders.

Renata W. Hannah is conducting research to find out the reasons why Soldiers do not attend battle assemblies and extended combat training.

Must meet one of the following criteria:

- A former or current leader in 3d MCDS and/or derivative units.
- Formerly or currently serving as Full Time Staff.
- Formerly or currently serving as a First Line Leader
- Interested participants will receive an invitation to participate.
- A Letter of Informed Consent will be emailed to all participants.
- This study is strictly voluntary and there will be no monetary gifts offered.
- The researcher's confidentiality is not the same as a doctor-patient confidentiality or attorney-client confidentiality. At no time during the interview process will a nonparticipant soldier identity be exposed which include Personally Identifiable Information (PII).
- Interested Participants, please contact Renata W. Hannah at [redacted] or email [redacted]

|  |  |  |  |
|--|--|--|--|
| RENATA W. HANNAH<br>[redacted]<br>[redacted] | RENATA W. HANNAH<br>[redacted]<br>[redacted] | RENATA W. HANNAH<br>[redacted]<br>[redacted] | RENATA W. HANNAH<br>[redacted]<br>[redacted] |
|--|--|--|--|

## Appendix F: Participant Invitation

**Participant Invitation**

Subject: Invitation to participate for research study

Project Title: Reducing the Nonparticipant's Number in the Army Reserve: A Phenomenological Qualitative Study

Dear Participant,

My name is Major Renata W. Hannah, I am conducting a dissertation research study as part of the requirements for my Ph.D. in Management degree, specializing in Leadership and Organizational Change. I would like to invite you to participate in answering 14 interview questions to find out reasons for nonparticipation in the Army Reserve.

I am researching the 3d Medical Command (Deployment Support) Leadership, Full-Time Staff and First-Line Leader (the participants) lived experiences on nonparticipation in the Army Reserve. The themes achieved from this phenomenological qualitative study will seek to enlighten the strategic, operational and tactical leadership, staff and soldiers within the Army Reserve to find out why soldiers choose not to participate in mandatory battle assembly and extended combat training. Training the leadership, staff and soldiers within the Army Reserve will support a positive social change capitalizing on working as a team while contributing to productivity within the organization and safeguarding millions of dollars withheld from Army Reserve accounts.

The researcher's confidentiality is not the same as a doctor-patient confidentiality or attorney-client confidentiality. At no time during the interview process will a nonparticipant soldier identity be exposed which include Personally Identifiable Information (PII). Please do not share operationally sensitive information or any personal information that could identify an individual (e.g., name or information specific to someone's unique role in the Command). The U.S. Army Research Institute for the Behavioral and Social Sciences Control Number: DAPE-ARI-AO-17-12, RCS: MILPC-3, Expires: 02/10/18.

The interview should take less than an hour and I will take notes during the interview. This study is voluntary and all your answers will be kept strictly confidential and your personal identity will not be shared. You can end the interview at any time. Let me know if you have any questions by emailing me at [REDACTED]

Sincerely,

[REDACTED]

Renata W. Hannah

## Appendix G: Interview Protocol

**Interview Protocol**  
**Semi-Structured Interview Questions**

**Research Project: Reducing the Nonparticipant Number in the Army Reserve:  
 A Phenomenological Qualitative Study**

Date \_\_\_\_\_

Time \_\_\_\_\_

Interview \_\_\_\_\_

Participant 1 \_\_\_\_\_

Email response to do the interview? \_\_

**Notes to interviewee:**

Thank you for your participation. Each participant will have a copy of the interview questions. Please do not share operationally sensitive information or any personal information that could identify an individual (e.g., name or information specific to someone's unique role in the Command). The U.S. Army Research Institute for the Behavioral and Social Sciences Survey Control Number: DAPE-ARI-AO-17-12, RCS: MILPC-3, Expires: 02/10/18. The following directions and semi-structured questions will be asked during the interview.

**Directions:** I will read each semi-structured open-ended question and you will provide your answer.

1. Demographics: Please choose one answer.
  - a. Leadership: (Commanders, CSM, 1SG)
  - b. Staff (SR HR NCO, HR SGT, G1/S1, SSA, SAA, UA, G3/S3, Training NCO, G4/S4, G6/S6)
  - c. First-Line Leader (AR Soldier, PLT Leader, PLT SGT)
2. What barriers prevent soldiers from attending monthly battle assemblies in the U.S. Army Reserve?

3. What barriers prevent Soldiers from attending Extended Combat Training in the U.S. Army Reserve?
4. What are some motivators to improve a soldier's attendance during battle assembly?
5. What are some motivators to improve a soldier's attendance for Extended Combat Training?
6. What currently happens when soldiers do not attend monthly battle assemblies in the U.S. Army Reserve? What happens to the nonparticipant soldier? What does the staff do? What does the chain of command do?
7. What currently happens when soldiers do not attend Extended Combat Training in the U.S. Army Reserve? What happens to the nonparticipant soldier? What does the staff do? What does the chain of command do?
8. In your opinion, how should soldier nonparticipation be handled by staff and the chain of command?
9. Are there any aspects of Army Regulation on nonparticipation that you believe could be improved? Please explain.
10. What keeps the staff (unit administrators, human resources personnel, etc.) from performing tasks to retain or recover a nonparticipant soldier?

**Directions for questions 11-14:** Read each statement carefully and decide to what extent you agree or disagree. Then, circle the number that best represents your opinion on the subject.

|                |       |         |          |                   |
|----------------|-------|---------|----------|-------------------|
| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
| 5              | 4     | 3       | 2        | 1                 |

11. Are Brigade commanders enforcing Army policy on the nonparticipant soldier at the lowest level?

|   |   |   |   |   |
|---|---|---|---|---|
| 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|

12. Are Battalion commanders enforcing Army policy on the nonparticipant soldier at the lowest level?

5      4      3      2      1

13. Are Company commanders enforcing Army policy on the nonparticipant soldier at the lowest level?

5      4      3      2      1

14. Should new policy be written to retain and recover nonparticipant soldiers?

5      4      3      2      1

## Appendix H: Memorandum Regarding Army Lean Six Sigma Black Belt Certification



DEPARTMENT OF THE ARMY  
HEADQUARTERS, UNITED STATES ARMY RESERVE COMMAND

AFRC-CP

OCT 12 2016

MEMORANDUM FOR Renata W. Hannah, 3d Medical Command (Deployment Support), 5015 North 34<sup>th</sup> Street, Building 900, Fort Gillem, Georgia 30297

SUBJECT: Award of Department of the Army Lean Six Sigma (LSS) Black Belt Certification

1. With the enclosed certificate, the Army officially recognizes you for your hard work, enthusiasm, and commitment to improving our Army. Congratulations on being awarded the Army Lean Six Sigma Black Belt certification. Your success will enable the Army to improve processes, increase effectiveness, and reduce costs. We now solicit your efforts as a Certified Black Belt to maximize the Army's LSS participation at all levels and to continue to execute projects that realize a significant return on investment for the Army.
2. As you gain experience as a Black Belt, we encourage you to seek opportunities to continue your Lean Six Sigma education and pursue Master Black Belt training and certification, with the possibility of making an even larger impact on the Army.
3. The Continuous Process Improvement Office exercises oversight of the LSS Program within U.S. Army Reserve Command. If you have questions regarding this certification, please contact [REDACTED]

Enclosure

[REDACTED]  
Major General, US Army  
Chief of Staff



Major General, US Army  
Chief of Staff

Director, Lean Six Sigma Program  
Continuous Process Improvement Office  
U.S. Army Reserve