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Principal Author:

Mr. Alan R. Cunningham

Other Author(s):

Ms. Amy McGrath, MAJ Portia Benson, Ms. Maura Keller

Principal Author's Organization:

US Army TRADOC Analysis Center - Fort Lee

Complete mailing address:

401 FIRST STREET, SUITE 401
FORT LEE, VA 23801-1511**X** Principal Author's Signature: 

Date: 18 Apr 08

Phone: (804) 765-1830

FAX: (804) 765-1456

Email: alan.cunningham@us.army.mil

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Army Reserve Accessions and Retention Analysis

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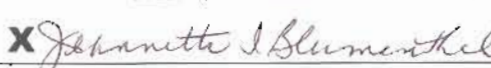
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Printed name: Jeannette I. Blumenthal

Releasing Official's Signature: 

Organization: US Army TRADOC Analysis Center - Fort Lee

Date: 29 APR 08

Complete mailing address:

TRAC-LEE
401 FIRST STREET, SUITE 401
FORT LEE, VA 23801-1511

Phone: (804) 765-1822

FAX: (804) 765-1456

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Army Reserve Accessions and Retention Analysis



**Briefing to the Military Operations Research
Society Symposium**

United States Coast Guard Academy

10-12 June 2008

Purpose

**To provide final results of the Army Reserve
Accession and Retention Analysis
(ARARA).**

**“I hope that this study gets taken seriously, and something
gets done about it. Thank you and Good luck!!”**

Soldier's Survey Response

Outline

- **Introduction.**
- **Scope, Constraints, Limitations, & Assumptions.**
- **Study Issues/Questions.**
- **Bottom Line Up-Front.**
- **Methodology Highlights.**
- **Focus Group Results.**
- **Interview and Survey Incentives Results.**
- **Soldier and Prospect Issues.**
- **Summary and Recommendations.**

Introduction

- **Purpose:** The purpose of this analysis is to inform more efficient budgeting decisions, and ensure that Army Reserve (AR) resources are applied to the best alternatives for building and maintaining a fully manned force under the Army Force Generation Model (ARFORGEN).
- **Study sponsor:** Chief, Army Reserve (CAR).
- **Study Program Manager:** AR PAE (Army Reserve Program Analysis and Evaluation).
- **Study agency:** U.S. Army Training and Doctrine Command Analysis Center – Fort Lee (TRAC-LEE).

Scope, Constraint, Limitation, & Assumptions

- **Study Scope:**

- Focus of this study is 1st term enlisted, company grade officers, male prospects, Soldiers leaving active duty with a remaining Reserve commitment, and Individual Ready Reserve (IRR) Soldiers.

- **Constraints:**

- OCAR required the results NLT 30 Sep 07.

- **Limitations:**

- Soldiers lack of knowledge of the ARFORGEN concept and timeline; and Department of the Army (DA), AR, and National Guard (NG) policies and programs.

- **Assumptions:**

- Surveyed respondents provided accurate and honest data and were representative of the entire targeted population.
- Additional comments from Soldiers represented their personal feelings and individual situations and were provided with the intent of bettering the Army's future recruitment and re-enlistment strategies.

Study Issues/Questions

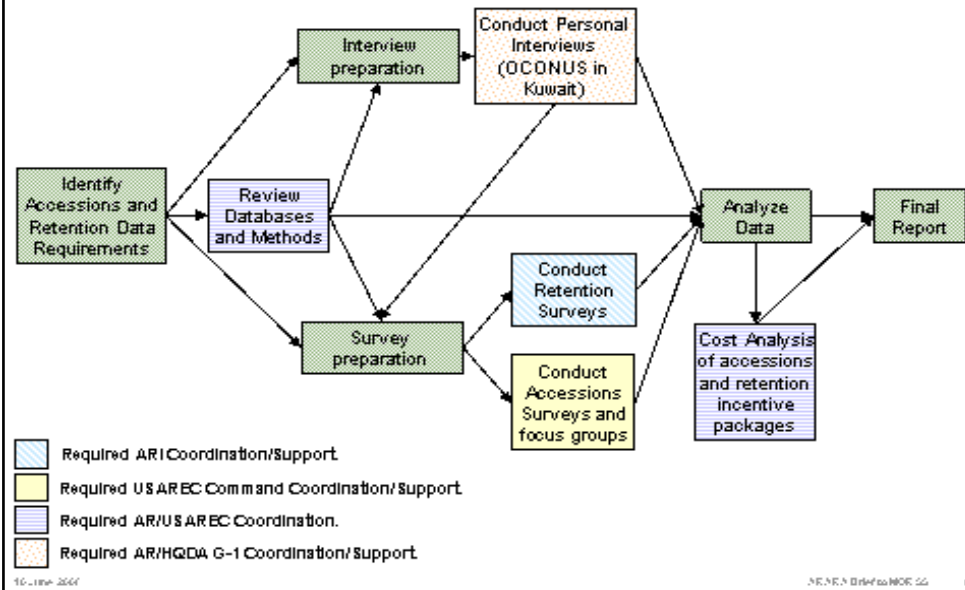
- **Study Issue 1:** What monetary incentives will provide the best benefit (accession and retention) against the cost?
- **Study Issue 2:** What non-monetary incentives would best improve recruiting and retention for the Army Reserve?

Bottom Line Up-Front

- Prospective Active Component (AC) recruits are very interested in education, healthcare, retirement, predictability, and stability. These concerns are the same as those of Army Reserve (AR) Soldiers.
- Most soldiers either joined or would have joined without a bonus. This presents an opportunity to provide other benefits rather than lump-sum bonuses. Major areas of concern that can be addressed:
 - **Retirement:** Thrift Saving Plan (TSP) matching funds (1% automatic and 5% maximum of base pay–like civilian FERS system).
 - **Healthcare:** Pay TRICARE premium (\$253/mo.) for satisfactory service.
 - **Pay:** Ensure Soldiers understand that TSP matching funds and TRICARE payments are equivalent to a pay raise.
 - **Education:** Better and easier access to benefits and loan repayment.
 - **Training:** More access to leadership (required for promotion) and confidence building courses (Airborne, etc.).
- There are many leadership and administrative actions that can and should be taken to improve retention (e.g., implementing ARFORGEN as designed (minimum 4-year dwell), better admin support, easier procedures for obtaining education benefits, fixing pay problems, awards, etc.).

Methodology Highlights

ARARA Methodology



- Conducted a detailed open and closed source literature review.
- Analyzed the AR G-1 database for departure trends for the period coming 2001-2006.
- Analyzed DMDC Accessions data for 2001-2006.
- Analyzed US Army Accessions Command accessions data for the period 2004-2006.

- Conducted more than 200 Soldier interviews including interviews at Fort Lee, Camp Arifjan, Camp Beuhring, and Camp Virginia.
- Sent survey links to over 500K Soldiers (Junior Officers and Enlisted) assigned to all three Army components.
- Received and analyzed over 25K Soldier responses including 11K Survey comments.
- Coordinated closely with US Army Accessions Command on prospect Focus Groups.

Male Prospects Focus Group Results



**Completed by Greenfield Consulting Group
during June 2007**

Focus Group Executive Summary

(General Learning Points)

- **Traditional benefits such as job choice, paying for college, and sign-on bonuses have broad initial awareness and continue to generate some interest and appeal.**
 - **Older High School segments and SODOs* with tuition and financial obligations tended to be receptive to these benefits more than younger segments.**
- **There was very strong interest in and motivational appeal for healthcare coverage and retirement benefits.**
 - **All age groups, including 13 to 15 year-olds, ranked these benefits highly and confirmed a growing concern that social security and healthcare will be less available in the future.**
 - **This suggests an opportunity for messaging that is not currently being addressed in the campaign.**

**SODOs: College Stop Out, Drop Outs.*

Focus Group Executive Point

(Predictability/Stability)

- **Conceptually, predictability and stability appear to generate consistently positive interest.**
 - Many felt their lives were somewhat out of their personal control, and they have little influence on the direction their lives are taking.
 - Change management is an issue, and many felt they don't have the skills to handle the lifestyle, personal, and fiscal changes that life is throwing at them.
 - Stability suggests “breathing space” that will allow time to “get your life together.”
 - Many equate these with “freedom” that they have lost as they age.
 - Most consider predictability and stability as ways to reduce personal stress.
- **In general, older market segments tended to value both stability and predictability more than younger generations.**

Focus Group Results

(Conclusion & Implication)

- **Communicate the realities of military service in the current global climate.**
 - Most felt there were both more troops and more casualties involved than actually are reported.
 - This misunderstanding gives respondents permission to believe that enlistment of any kind poses significant personal risk, regardless of the positive financial, educational, and personal benefits offered.
- **Consider revising messaging to reflect the importance and motivational appeal of traditional work benefits, specifically healthcare coverage and retirement income.**
 - There were indications that money for college, sign-on bonuses, and job training are considered table stakes for military service.
 - Healthcare and retirement may be emotional tiebreakers that corporate career paths cannot guarantee or are downplaying.

Interview and Survey Incentives Results



Enlisted Incentives

AR

1. Increased base pay.
2. Lump sum reenlistment bonus.
3. Promotion opportunities.
4. More training.
5. Full student loan repayment.
6. Reclassify.
7. Full-time TRICARE.
8. NCO leadership.
9. More time with my family.
10. Graduate school.

NG*

1. Increased base pay.
2. Promotion opportunities.
3. Lump sum reenlistment bonus.
4. More training.
5. NCO leadership.
6. Double retirement points.
7. Full student loan repayment.
8. Full-time TRICARE.
9. Reclassify.
10. Reduce retirement age.

AC**

1. Increased base pay.
2. More time with family.
3. Lump sum reenlistment bonus.
4. Promotion opportunities.
5. NCO leadership.
6. Being assigned to a unit closer to home.
7. MGI B transferability.
8. Reclassify.
9. Graduate school.
10. Family support.

Increased pay is most important followed closely by promotion opportunities, more training, and education, health care (RC), and retirement benefits.

Officer Incentives

AR

1. Increased base pay.
2. Reduce retirement age.
3. Full student loan repayment.
4. One year grad school.
5. Opportunity to move between compos.
6. Promotion opportunities.
7. More time with family.
8. Full-time TRICARE.
9. Lump sum reenlistment bonus.
10. Double retirement points.

NG*

1. Increased base pay.
2. Reduce retirement age
3. One year grad school.
4. Full student loan repayment.
5. Lump sum reenlistment bonus.
6. Double retirement points.
7. More time with family.
8. Promotion opportunities.
9. Opportunity to move between compos.
10. Full-time TRICARE.

AC**

1. Increased base pay.
2. More time with family.
3. One year grad school.
4. Promotion opportunities.
5. Officer leadership.
6. Being assigned to unit closer to home.
7. Full student loan repayment.
8. Double retirement points.
9. Increase special pay.
10. Predictability.

As with enlisted Soldiers, increased pay is most important. Education was next, followed closely by promotion opportunities, more time with family, and health care (RC) and retirement benefits.

* Incentives for NG Soldiers to join the AR. ** Incentives for AC Soldiers to join the AR.

Soldier and Prospect Issues



Soldier Issues

- Deployments.
- Bonuses.
- Dual Military.
- Transfer between components.
- Stop loss.
- Sister Service inequity.
- Benefit disparity between RC and AC.
- Career management.
- Awards.
- Pay (Specialty, Drill Pay).
- Retirement.
- Child care.
- IRR management.
- Promotions.

Most prevalent Soldier issue from the comment section of the survey was deployments (both length and frequency).

Summary and Recommendations



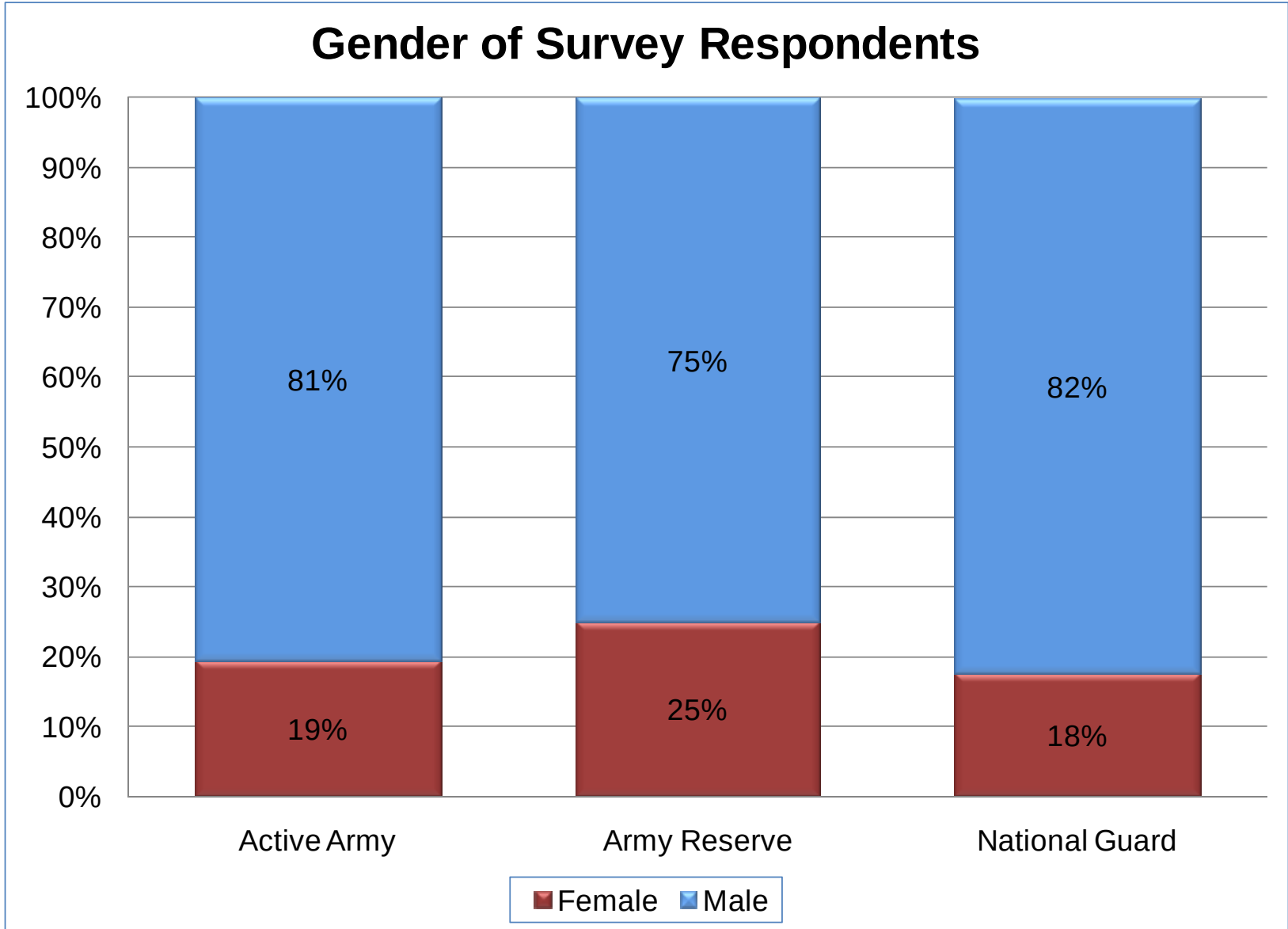
Summary and Recommendations

- ***There are many actions of a leadership and administrative nature that can and should be taken to improve retention*** (e.g., implementing ARFORGEN as designed (minimum 4-year dwell), better admin support, easier procedures for obtaining education benefits, fixing pay problems, awards, etc.).
- ***Most soldiers either joined or would have joined without a bonus.*** This presents an opportunity to provide other benefits rather than lump-sum bonuses. Major areas of concern that can be addressed:
 - **Retirement: Thrift Saving Plan (TSP) matching funds (1% automatic and 5% maximum of base pay–like civilian FERS system).**
 - **Healthcare: Pay TRICARE premium (\$253/month) for satisfactory service.**
 - **Pay: Educate Soldiers on TSP match and TRICARE payment being same as a pay raise.**
 - **Education: Better and easier access to benefits and loan repayment.**
 - **Training: More access to leadership (required for promotion) and confidence building courses (Airborne, etc.).**
- Prospective Recruits are very interested in [education](#), [healthcare](#), [retirement](#), [predictability](#), and [stability](#). Army Reserve Soldiers have the same concerns.

Backup Slides



Gender by Army Component



Army Reserve Incentives

Enlisted

1. Increase base pay.
2. Reenlistment bonus.
3. Promotion opportunities.
4. More training.
5. Student loan repayment.
6. Opportunity to change MOS.
7. Full-time TRICARE.
8. NCO leadership.
9. More time with family.
10. 1 yr grad school.

Officer

1. Increase base pay.
2. Reduce age 60 retirement.
3. Student loan repayment.
4. 1 yr grad school.
5. Move among Compos.
6. Promotion opportunities.
7. More time with family.
8. Full-time TRICARE.
9. Reenlistment bonus.
10. 2x points in combat zone.

All Females

1. Increase base pay.
2. Student loan repayment.
3. Reenlistment bonus.
4. 4+ yrs notice to deploy.
5. Promotion opportunities.
6. 1 yr grad school.
7. Opportunity to change MOS.
8. More time with family.
9. Full time TRICARE.
10. More training.

All Males

1. Increase base pay.
2. Reenlistment bonus.
3. Student loan repayment.
4. Reduce age 60 retirement.
5. Promotion opportunities.
6. 1 yr grad school.
7. Full time TRICARE.
8. More training.
9. More time with family.
10. Move among Compos.

Reserve Component Incentives*

White (81%)

1. Increase Base Pay.
2. Reenlistment bonus.
3. Promotion opportunities.
4. Reduce age 60 retirement.
5. Student loan repayment.
6. More training.
7. 2x points in combat zone.
8. 1 yr of grad school.
9. Full time TRICARE.

African American (9%)

1. Increase Base Pay.
2. Reenlistment bonus.
3. Promotion opportunities.
4. Student loan repayment.
5. Reduce age 60 retirement.
6. Better professional development.
7. Opportunity to change MOS.
8. More training.
9. 1 yr of grad school.
10. More time with my family.

Hispanic (13%)**

1. Increased base pay.
2. More time with family.
3. Reenlistment bonus.
4. Promotion opportunities.
5. NCO leadership.
6. Being assigned to a unit closer to home.
7. MGIB transferability.
8. Opportunity to change MOS.
9. Graduate school.
10. Family support.

* Includes both Army Reserve and Army National Guard.

** Percents not additive as Hispanic can be either white or African American.

Issue: Deployments

- **Discussion:**

- Soldiers are unaware of the ARFORGEN rotational concept.
- AR Soldiers are having problems juggling the Reserve, civilian jobs, and family responsibilities.
- AR Soldiers find deployments of more than 12 months to be too demanding on families. Soldiers want 6-month deployments.
- Prospects felt there were both more troops and more casualties involved than there actually are.

- **Recommendations:**

- Ensure that the ARFORGEN concept is disseminated down to the lowest level.
- Continue to move the AR from a strategic force structure into an operational force structure.
- Conduct a Soldier Burnout Study to determine/analyze optimal dwell times and deployment lengths for all components.
- Provide the media accurate details with respect to current deployments to counter perceived misconceptions.

Issue: Promotions

- **Discussion:**

- The current promotion system does not track AR Soldiers that are fillers in another unit, thus causing a delay in promotions.
- Junior Enlisted promotion boards are not conducted on a continuous basis.
- Perceived equity problems exist between deployed Soldiers and non-deployed counterparts who are able to attend additional schools/classes for promotion points.

- **Recommendations:**

- Ensure performance gates are met and equity exists within the AR.
- Pursue a speedup of AR promotions especially for MOSs/Units where Soldiers are frequently serving in combat zones with their AC counterparts.
- Ensure periodic inspections are conducted throughout AR units to ensure that leaders are tracking Soldier promotions.

Issue: Healthcare

- **Discussion:**

- Health care gaps exist for mobilized AR Soldiers. Some AR Soldiers pay more for healthcare under TRICARE than under their civilian insurance. Some are put on wait lists due to their status as an AR member.
- Some healthcare providers do not accept TRICARE.
- Healthcare coverage is a major concern of current youth.

- **Recommendations:**

- Ensure that all AR Soldiers are aware of the new TRICARE Reserve Select.
- Market the new TRICARE Reserve Select to potential prospects.
- Lobby for increased TRICARE and MEDICARE reimbursements for service by healthcare providers.

Issue: Retirement

- **Discussion:**

- AR Soldiers want to collect retirement benefits earlier than 60 years of age.
- Soldiers are interested in the Thrift Savings Plan (TSP).
- The military services were given the “go ahead” to provide TSP matching contributions; however, they have yet to provide this benefit across the board.
- Potential prospects are concerned about retirement.

- **Recommendations:**

- Provide matching contributions to all Soldiers that contribute to TSP (min 1%, max 5%).
- Use TSP as a marketing tool for people interested in joining and as a retention tool for Soldiers who are currently serving in the AR.
- Pursue across the board increases to Reserve Component (RC) retirement benefits.

Issue: Bonuses

- **Discussion:**

- The Army announced a plan to offer increased bonuses to AC Captains but not AR Captains.
- Many senior enlisted and mid-level officers want bonuses.
- Soldiers feel that bonuses should be given to critical MOSs.

- **Recommendations:**

- Ensure that eligible AR Captains are aware of the improved bonus policy when it becomes available.
- Market non-monetary incentives, TRICARE, and TSP matching funds as opposed to large bonuses.
- Provide small kickers to critical MOSs.

Issue: Dual Military

- **Discussion:**

- Dual military couples are serving our country in all components and in all branches (approximately 20,000 couples).
- Soldiers indicated that assignments and deployments are not managed well for dual military serving in different components of the Army.

- **Recommendations:**

- Implement a Married Couples Program that includes all components.
- When possible, the Army needs to assign married couples to force pools according to their preference. Some Soldiers want alternating pools in order to care for dependents, while other Soldiers want to be in the same force pool.

Issue: Switching Between Components

- **Discussion:**

- Soldiers are interested in transferring back and forth between the AC and RC.
- Soldiers believe that the flexibility to move back and forth will allow for greater retention in the Army.
- Soldiers indicated that the bureaucracy is cumbersome, transfer paperwork takes too long to process, and paperwork gets lost way too often.

- **Recommendations:**

- Streamline the paperwork process. Reduce the Soldier wait time for transfer actions using the Lean Six Sigma methodology.
- Ensure that Soldiers are aware of the Army's Continuation Program when it becomes available.
- Update the Human Resources Command (HRC) websites with a single online application process for Soldiers wishing to transfer between components (application can include email signature approval from losing component rather than separate memos/records).

Issue: Career Management

- **Discussion:**

- **Soldiers want some predictability and control over their military school schedules.**
- **Soldiers perceive that the Army does not care about their priorities.**
- **Soldiers want a voice in choice of assignment, schools, and incentives, and want personalized attention from career managers.**

- **Recommendations:**

- **The Army needs to employ Lean Six Sigma methodologies to reduce wait times and ensure more timely personnel support to all Soldiers.**
- **Continue to update HRC websites for access by all components. Soldiers should be able to receive “help desk” type support for personnel issues using the site.**
- **The Army needs to reassess the personnel system to ensure the proper number of career managers and unit administrators are in place to fully support troops in peacetime and wartime.**

Issue: IRR Management

- **Discussion:**

- Recalled IRR Soldiers considered themselves punished for fulfilling their oaths.
- Perceived belief that family support is not available for deploying IRR Soldiers.
- Some IRR members were forced to return to their home station since they were mobilized early.
- Soldiers perceive that the way to stay away from deployments is to join an RC Unit.

- **Recommendations:**

- From a recalled IRR Soldier “Members of the IRR who do not show for mobilization should be forced to repay any and all incentives (ROTC Scholarships, bonus, etc.) for failing to complete their term of service.”
- The Army needs to update personnel and training data systems to ensure timely and appropriate Soldier documentation and processing.

Interviews Conducted

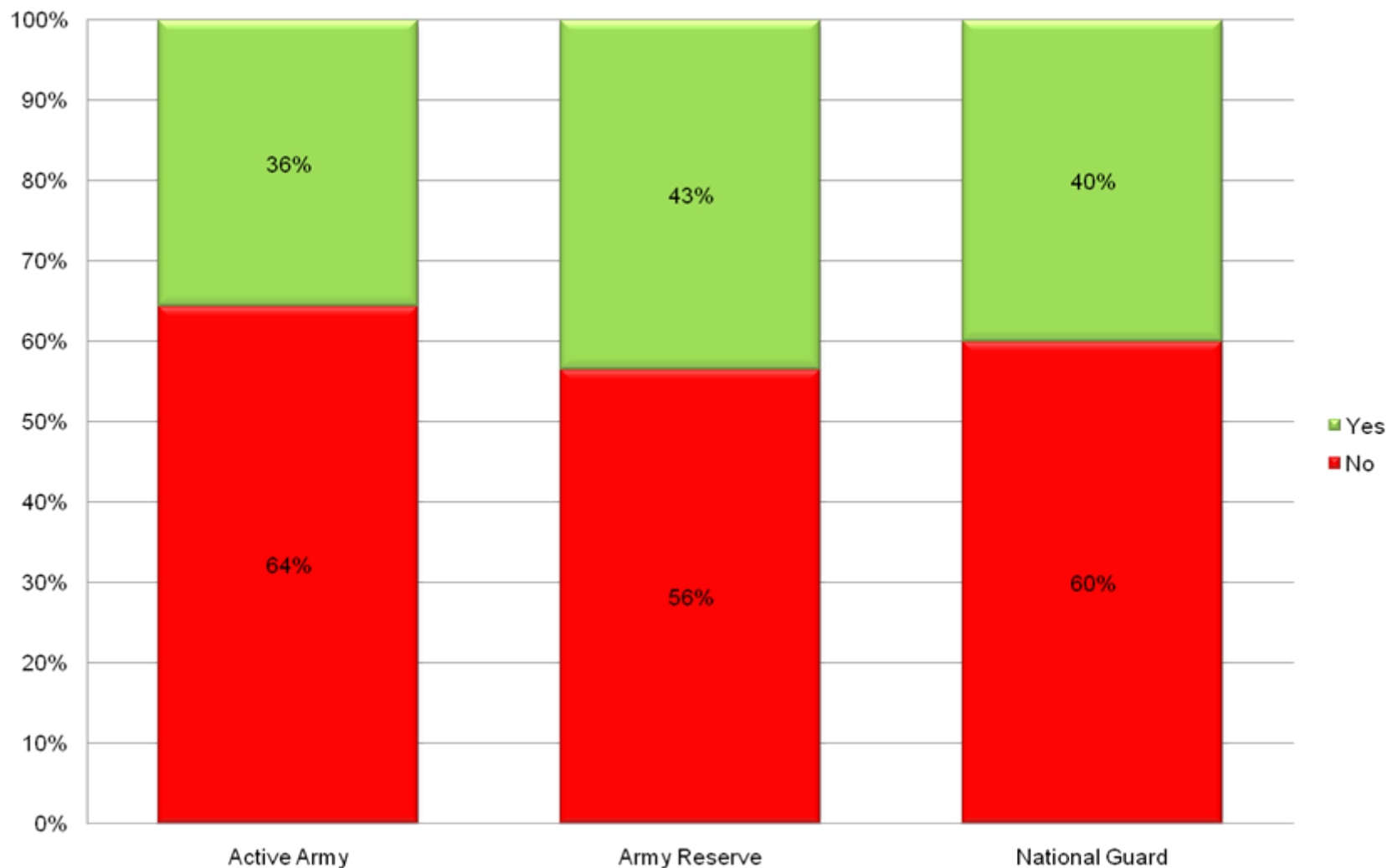
- **We conducted 200 Interviews.**
 - 179 Enlisted (2 PVT, 10 PV2, 13 PFC, 102 SPC/CPL, 41 SGT, 10 SSG, 1 Undetermined).
 - 21 Officers (1 2LT, 9 1LT, 10 CPT, 1 CW2).
 - 159 Males.
 - 41 Females.
 - 37 Active Army.
 - 116 AR.
 - 36 NG.
 - 11 IRR.
- **30% had heard something about ARFORGEN and the rotational concept.**
- **65% had at least some college.**
- **47% were married.**

Survey Respondents

- **Over 25,600 respondents.**
 - 61% enlisted, 39% officers (population was only 10% officers).
 - 11% AR, 23% NG, & 65% AC (AC was 51% of population).
 - 80% male.
- **Only 43% of AR, 40% of NG, and 36% of AC had heard something about ARFORGEN and the rotational concept.**
- **76% of AR, 73% of NG, and 66% of AC enlisted Soldiers had at least some college.**
- **56% of Soldiers were married.**

ARFORGEN Awareness

Have You Heard About ARFORGEN?

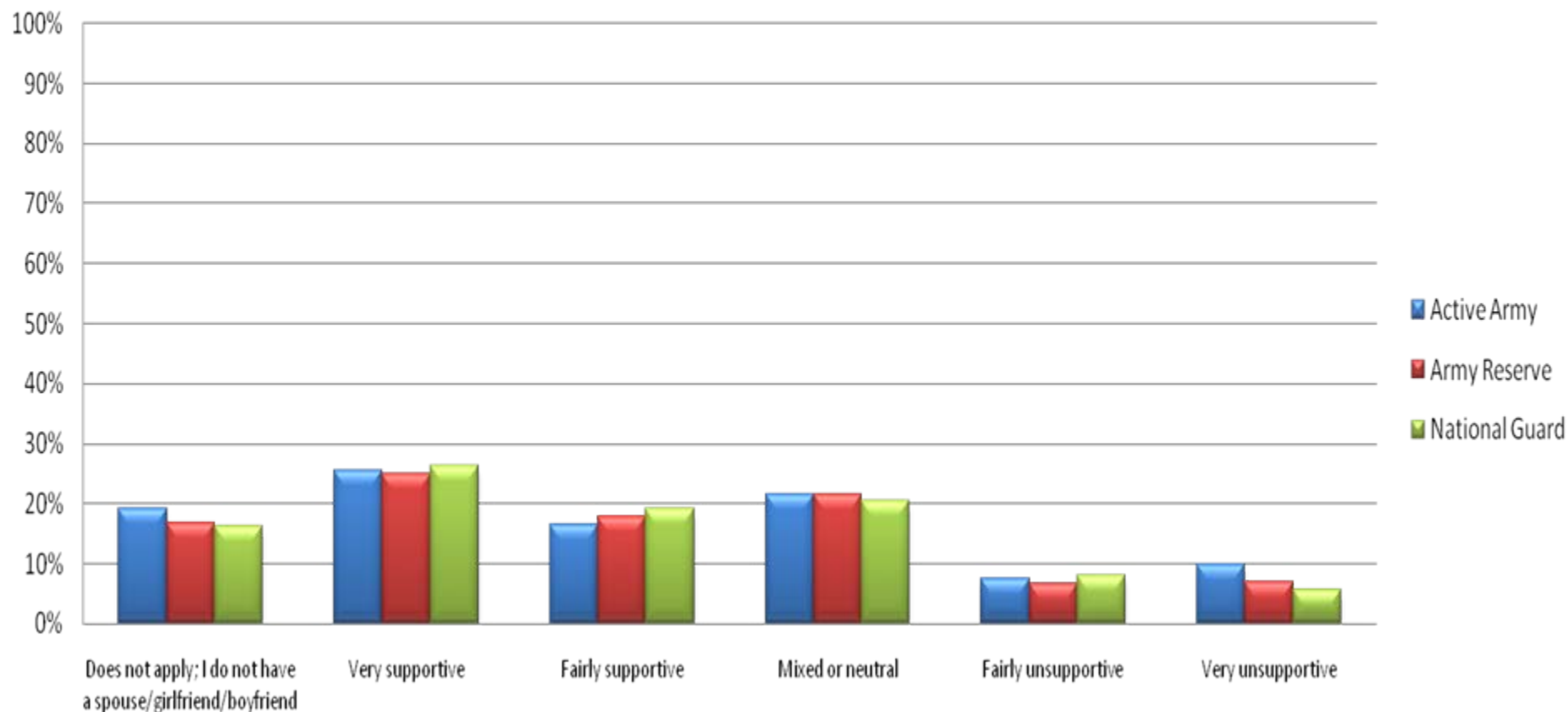


Survey Issue: Families and Civilian Employers

- Cross-leveled Soldiers are left out.
- Some units do not provide the support needed.
- Soldiers want more time with family.
- Long deployments (> 8 months) are destroying families.
- Family Readiness Groups need to be improved.
 - **Some provide too much information to the wrong people when Soldier would rather tell themselves (don't go overboard).**
- AR Soldiers are having problems juggling the Reserve, civilian jobs, and family responsibilities.
- Soldiers find deployments of more than 12 months are too much on families and civilian employers – especially those that are self-employed or in small businesses.

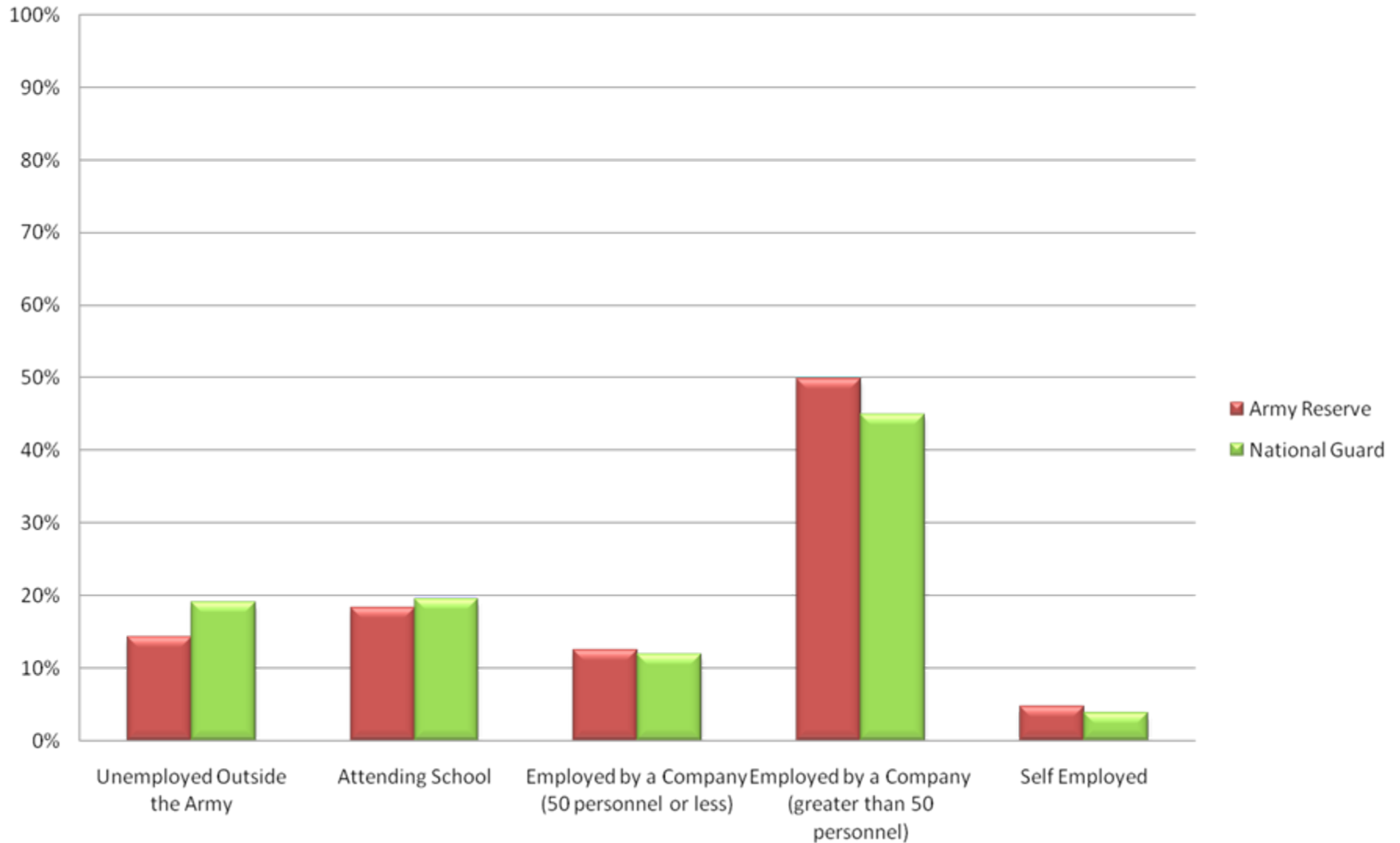
Significant Other Support

How Supportive is Your Spouse/Girlfriend/Boyfriend of You Making a Career in the Army?



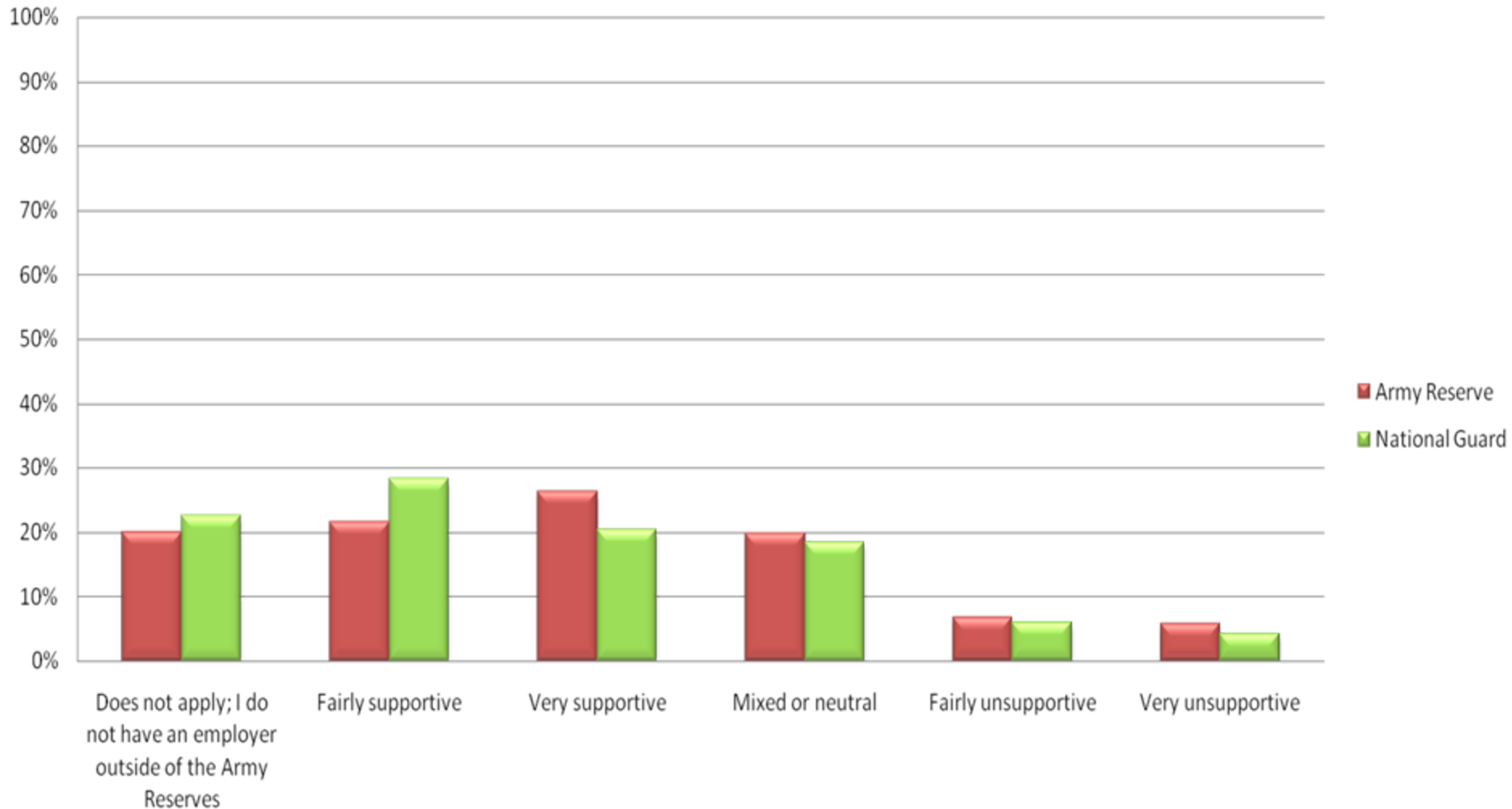
Current Employment Status

Current Employment Status



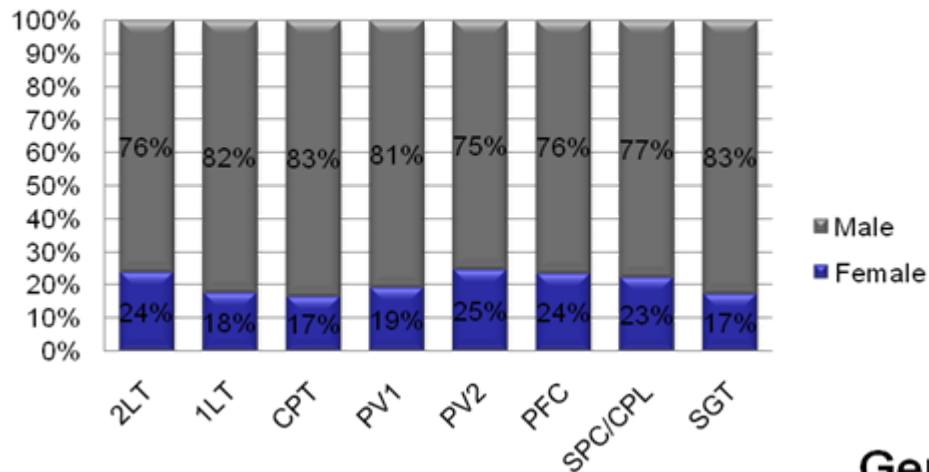
Employer Support

How Supportive is Your Employer of You Making a Career in the Army?

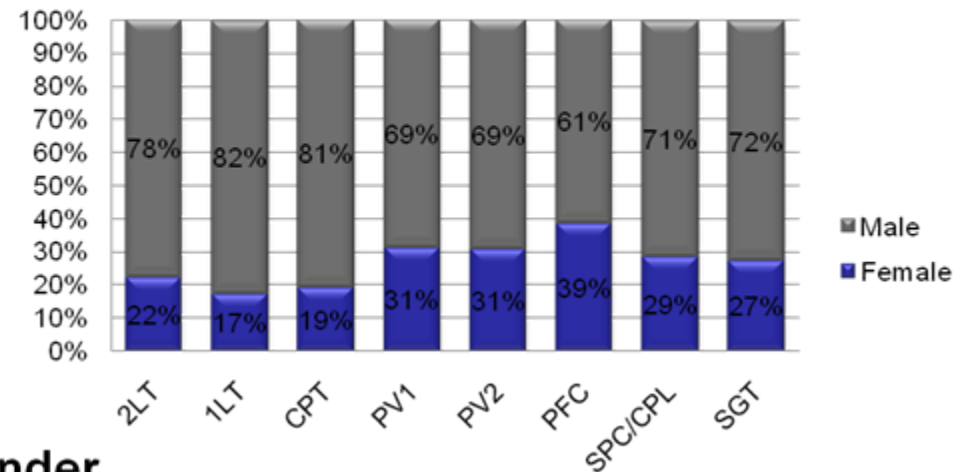


Gender by Rank

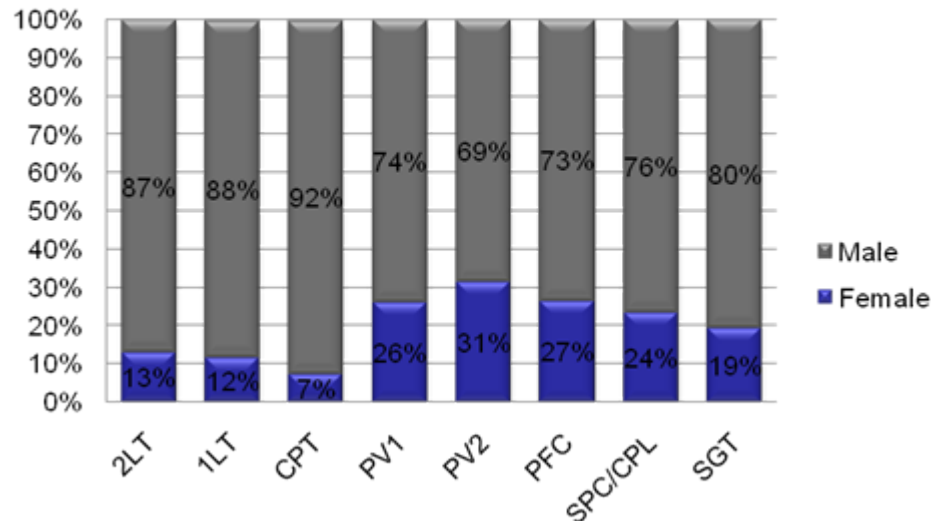
Gender (Active Army)



Gender (Army Reserve)

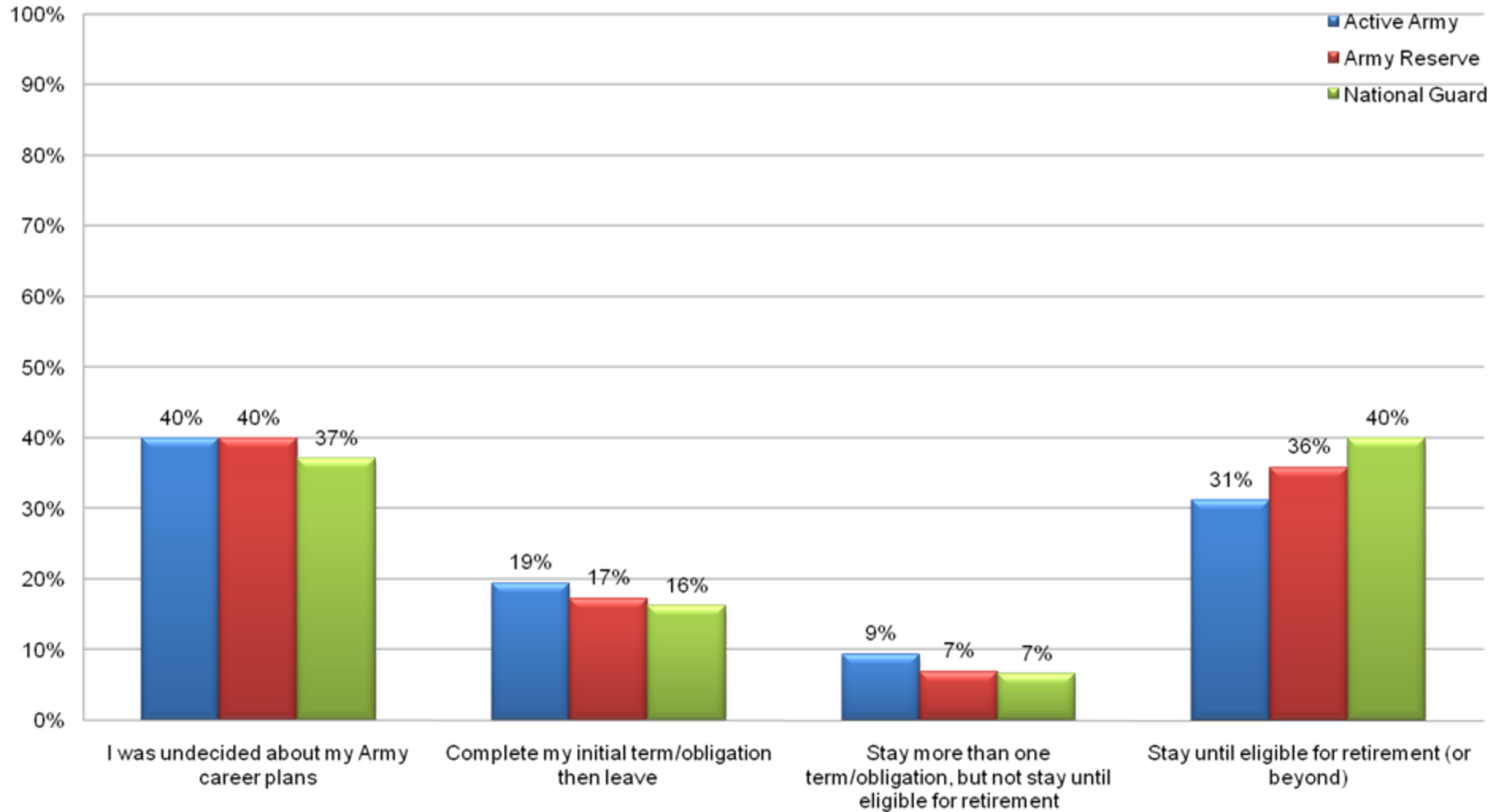


Gender (Army National Guard)



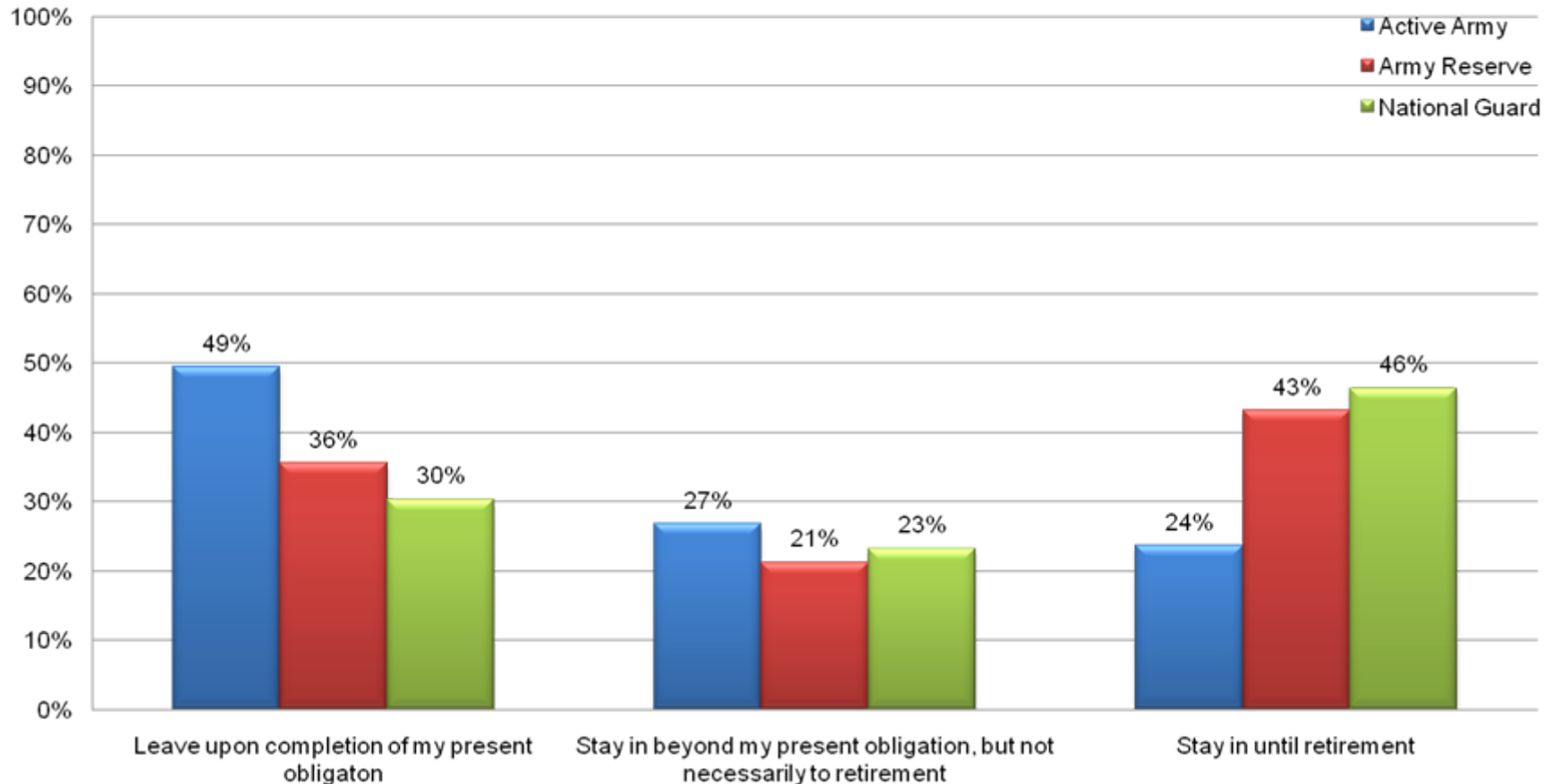
Original Career Intentions

When You First Entered the Military What Were Your Career Plans?



Current Career Intentions

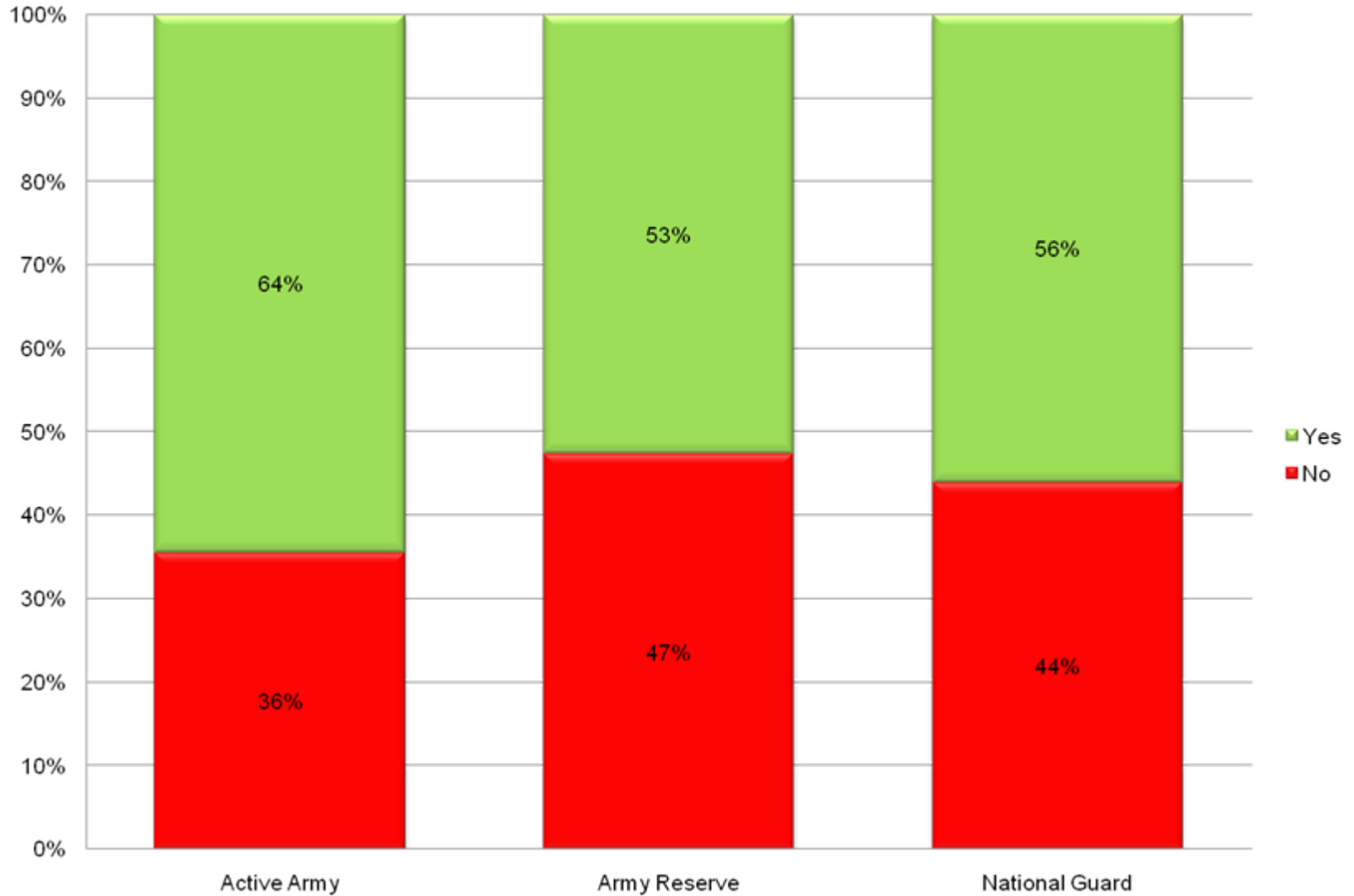
Which One of the Following Currently Describes Your Current Career Intentions?



The undecided AC Soldiers are now more inclined to leave after their current obligation, RC Soldiers are more inclined to stay.

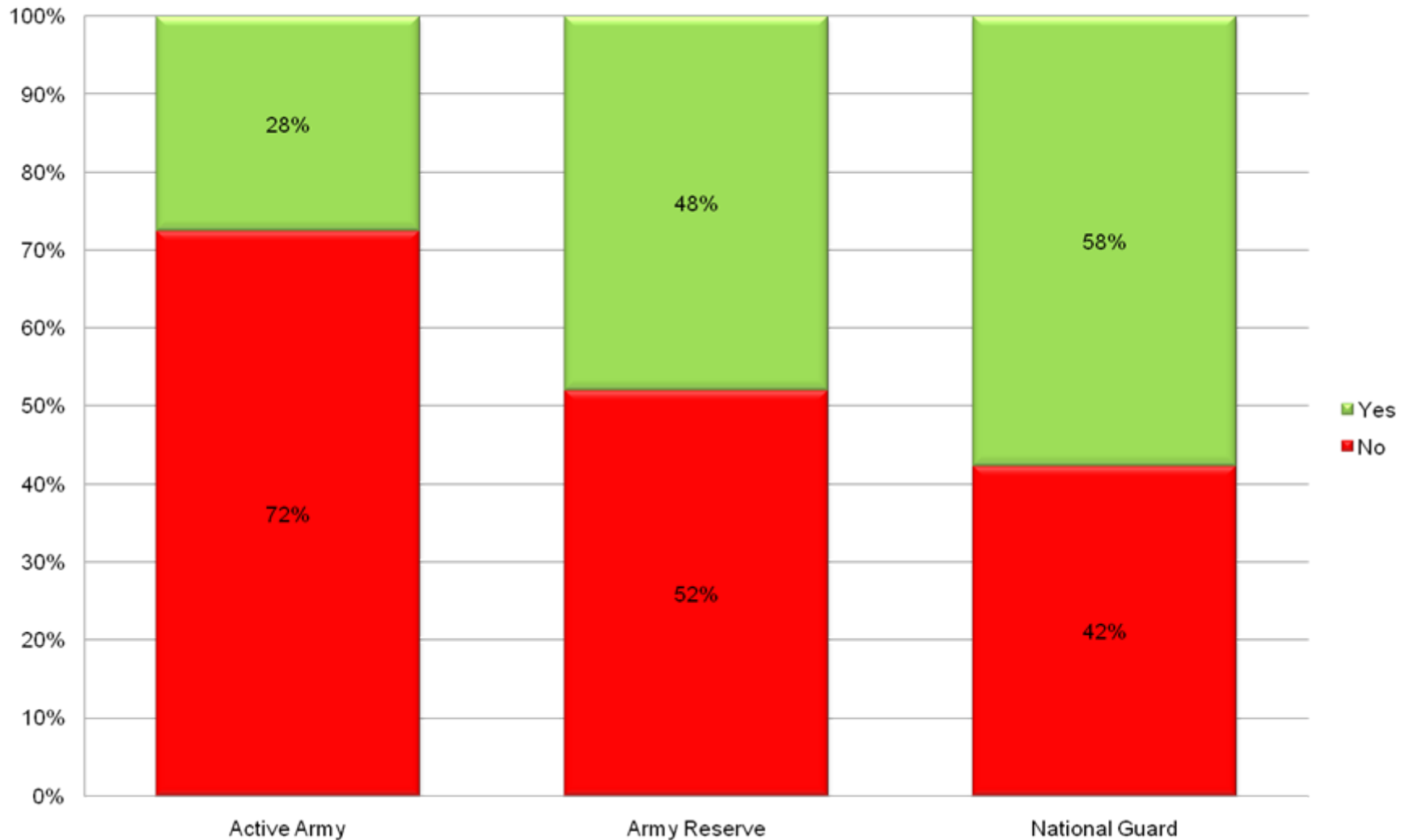
Deployed Since 9/11

Have You Been Deployed Since 9/11?



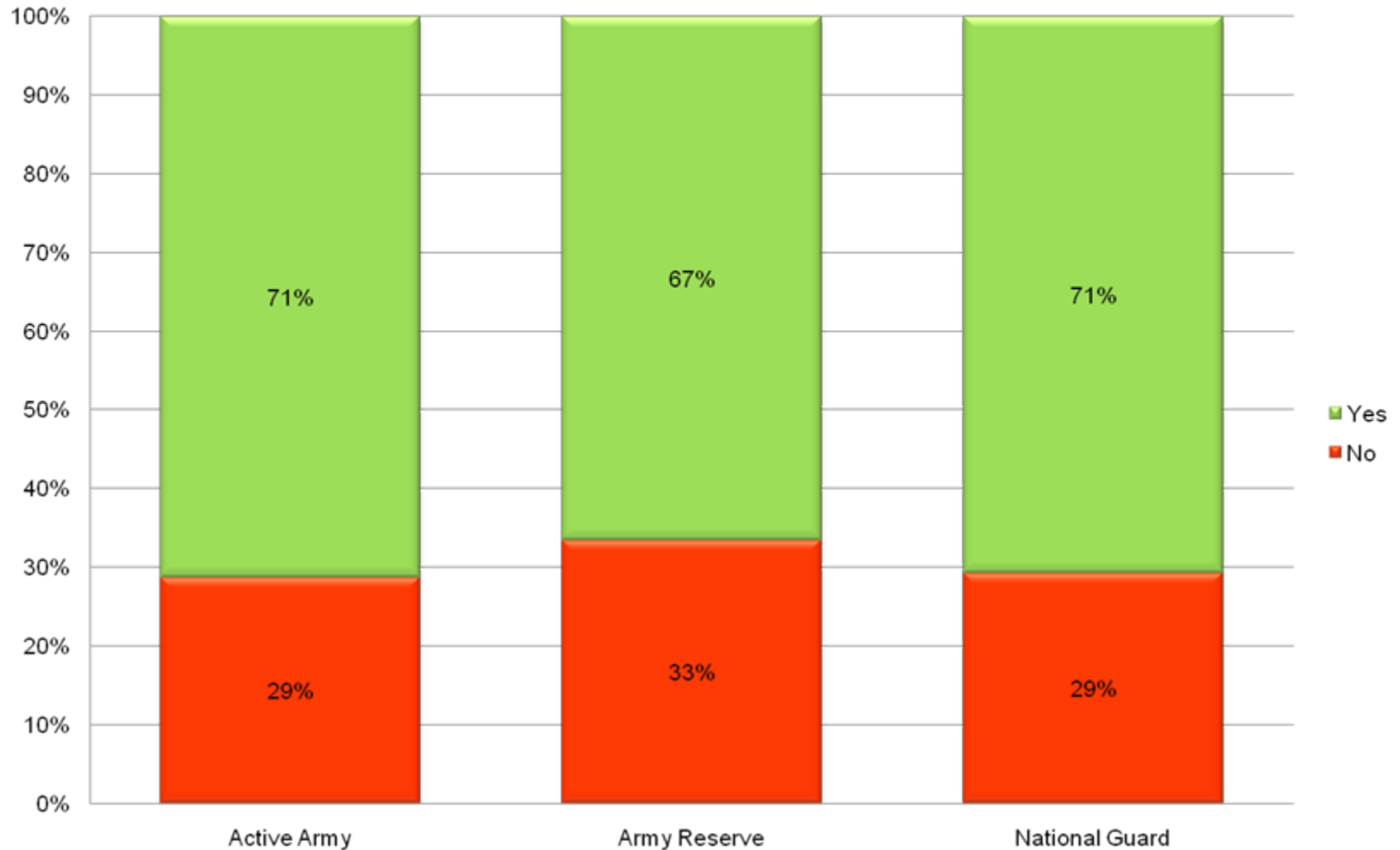
Accession Bonuses Received

Did You Receive a Cash Bonus to Join the Army?

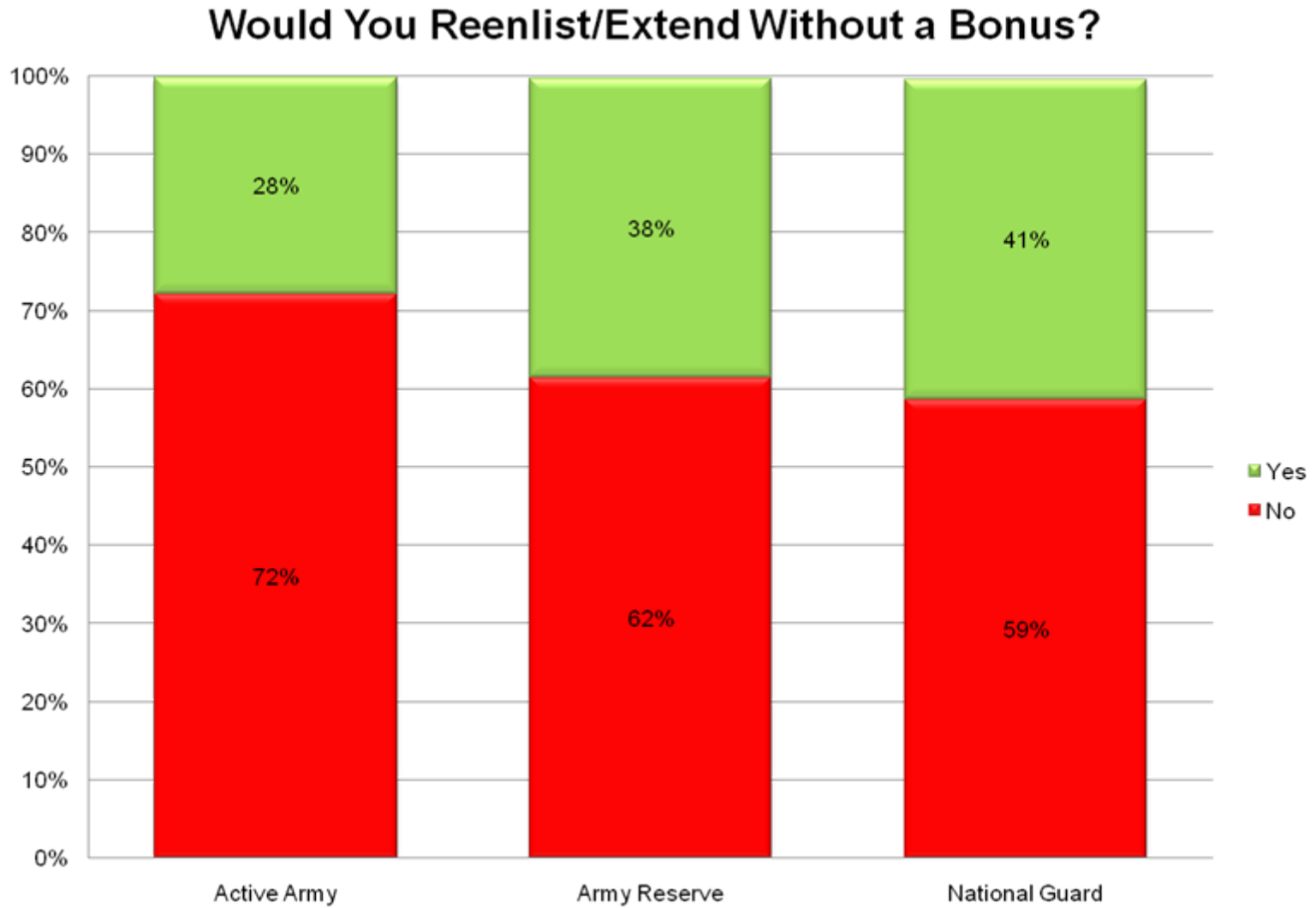


Propensity to Join Without a Bonus

Would You Have Joined the Army if You Had NOT Received a Bonus?

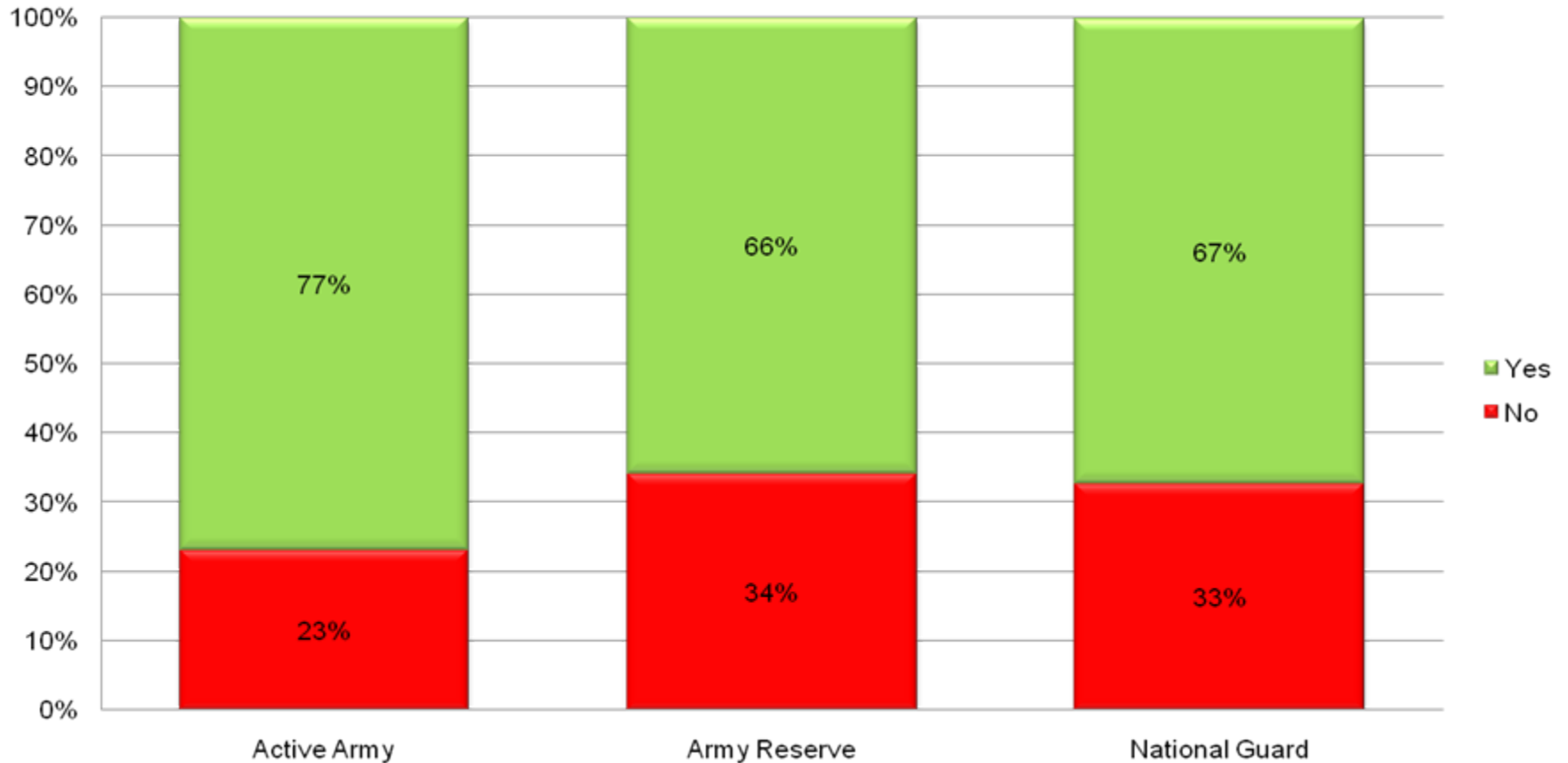


Propensity to Stay Without a Bonus

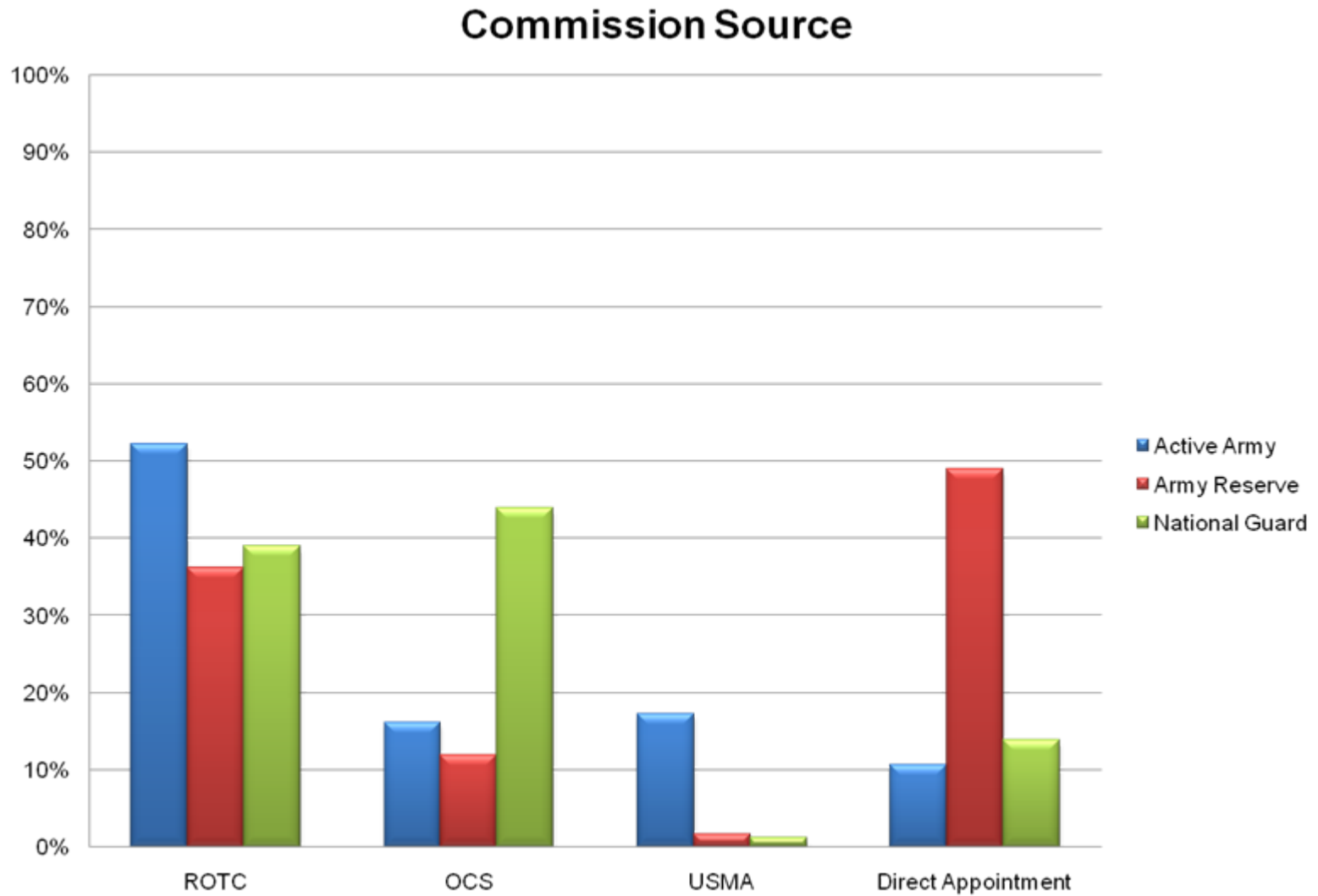


Working in MOS

Are You Currently Working In Your MOS/AOC?



Officer Commission Source



Points of Contact

TRADOC Analysis Center – Fort Lee, CSS Studies Division.

Study Director: Mr. Alan Cunningham (COL, USAR, Retired), commercial 804-765-1830, DSN 539-1830, e-mail: alan.cunningham@us.army.mil.

Military Analyst: MAJ Portia Benson, commercial 804-765-1854, DSN 539-1854, e-mail: portia.benson@us.army.mil.

Military Analyst: MAJ Hans Barkey, commercial 804-765-1818, DSN 539-1818, e-mail: hans.g.barkey@us.army.mil.

Analyst: Ms. Amy McGrath, commercial 804-765-1827, DSN 539-1827, e-mail: amy.mcgrath@us.army.mil.

Analyst: Ms. Maura Keller (LTC, USAR, Retired), Contractor, e-mail: maura.keller@us.army.mil.