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A New Approach for Assessing the Needs of Service Members and Their Families

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Preface

In 1971, in the middle of the undeclared wars in Southeast Asia and with America engaged in combat in South Vietnam, Congress agreed to President Nixon's proposal to transition to an all-volunteer force. Since then, all of the Military Services have relied on volunteers to meet their manpower needs. One aspect unique to the all-volunteer force is the high proportion of military members who are married and have children. This presented new challenges, and a great many programs have been developed since then to help members and their families. This volume undertakes the challenge of developing a tool that the Department of Defense (DoD) and local military commanders can employ to gauge the range of problems and problem-related needs of service members and their families, how well those needs are being met, the barriers and bridges to meeting those needs, and which populations might need a focused outreach. It also provides an overview of how to maximize the utility of this tool through implementation. The basic framework of the tool has broad applicability. The content of the survey instrument offered here could easily be adapted to other populations or purposes. It could be modified to address other populations, such as veterans and their families, or the needs of families in a foreign country. The individual questionnaire items can be modified to reflect emerging or declining issues or to delve in more detail into particular matters such as well-being. As long as the overarching framework and interrelated survey item design are preserved, the new methodology and the computer programs that support it can be adapted in a variety of ways without compromising the basic utility of the approach.

This research was sponsored by the Office of the Under Secretary of Defense for Personnel and Readiness and conducted within the Forces and Resources Policy Center of the RAND National Defense Research Institute (NDRI), a federally funded research and development center sponsored by the Office of the Secretary of Defense, the Joint Staff, the Unified Combatant Commands, the Navy, the Marine Corps, the defense agencies, and the defense Intelligence Community. For more information on the Forces and Resources Policy Center, see http://www.rand.org/nsrd/ndri/centers/frp.html or contact the director (contact information is provided on the web page). Comments or questions should be addressed to the project leader, Laura Miller, at lauram@rand.org, 703-413-1100 x 5912.

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Summary

Since the advent of the all-volunteer force in the 1970s, military family programs and quality-of-life initiatives for service members have grown and continue to grow. Despite widespread belief that these programs enhance military recruitment, retention, readiness and performance, scant evidence exists to demonstrate this link, or to determine what types of support have the greatest impact or return on investment. A 1988 Department of Defense Directive[1] requires military family support programs to be responsive to the needs of service members and their families, yet most assessments place existing programs at the center of the inquiry, not the needs of personnel and their families. Assessments that do ask about needs typically fail to link them with program use or whether those programs helped to meet those needs.

This document proposes a research framework and survey that differs from existing survey efforts. The new approach allows us to link service members' and spouses' most pressing problems to their self-defined resulting needs. Then, within that context, it can link those responses to responses about military and nonmilitary services used and not used and perceptions about those services, including whether they were able to help solve problems. This monograph proposes a research framework and a survey that differs from existing survey efforts. The new approach allows us to link service members' and spouses' most pressing problems to their self-defined needs. Then, within that context, it links those needs to the military and nonmilitary services they used and did not use and their perceptions about those services, including whether they helped solve their problems. The monograph shows the process by which we developed and tested this framework and a sample corresponding survey instrument. We also discuss how this approach differs from others, the challenges to implementing such a survey, and the value of the potential survey results to different types of military leaders and support service professionals.

[1] Directive No. 1342.17, *Family Policy*, Washington, D.C.: Department of Defense, 1988.

How Can We Frame an Approach to Understanding Service Member and Family Needs?

This study developed a new methodological framework for assessing military personnel and military family needs that fills a gap not currently met by existing efforts. The framework places personnel and spouse perceptions of problems and needs and prioritization of those problems and needs at the center of the analysis. The framework follows the logic of a set of questions that a research initiative on this topic should pursue:

1. What is the context? Context includes Military Service (henceforth referred to as Service), base, and personnel and family demographics, such as information about children and deployments.
2. What have respondents experienced as problems? The framework captures experiences across several domains (e.g., health, finances, or spouse employment) that service members and spouses self-define as rising to the level of a problem. For those with problems in multiple domains, this approach includes asking for prioritization of the most significant problems.
3. What types of help did respondents need in order to address their most significant problems (e.g., the need for information, advice, or counseling)? Which of those problem-related needs did they deem the greatest?
4. What military and nonmilitary resources did personnel or their spouses contact to try to meet the most important needs?
5. What factors made military and nonmilitary resources easier or more difficult to access? What barriers and bridges did the respondents perceive or encounter?
6. Did the resources that personnel or spouses contacted actually help them meet their problem-related needs?
7. What is the connection between met needs and outcomes? Outcomes could include satisfaction with military life and troop and family readiness and retention.

This approach is not designed to provide a comprehensive picture of any particular program or of the military community. Instead, it focuses on the most significant problems and needs that service members and their families are facing, and how and whether those priority needs are being met.

What Type of Tool Will Better Enable Decisionmakers to Understand and Support the Military Community?

Using the framework based on the questions above, we developed a sample survey instrument to assess the needs of active-component single and married service members and spouses facing problems in any of an array of problem types. We developed

the survey content by synthesizing information from a variety of sources. Brainstorming focus groups with Army and Marine Corps service members, spouses, and support providers (such as chaplains, medical professionals, and first sergeants) helped us develop content that was current and relevant to their experiences. Meetings with subject matter experts and military leadership also provided their insights on the key issues and concerns from the perspective of the decisionmaker and resource manager. A review of previous research highlighted issues of concern historically, and a review of DoD survey instruments in this domain revealed what previous efforts considered worthy of assessment. Thus, the issues addressed—such as childcare, health care, mental health, relocations, and financial problems—are not unknown to military leaders or service providers and they do appear in prior research efforts. What is new is the approach of centering the experiences on service members and their families and drilling down to trace the connections between problems and associated needs to the resources that respondents contacted to meet those needs, to barriers and bridges to using government and private resources, and finally to whether respondents' needs were actually met. A limited pilot test of this new instrument with 759 respondents also helped identify problems, needs, and types of resources relevant today, particularly through the open-ended options in each category and at the end of the survey. The subsequently revised survey instrument, provided in Appendix A, illustrates the application of the research framework. However, this instrument could be modified, or existing surveys could be modified, and still successfully embody the new research approach.

To preserve the value of the new approach, several critical elements of this tool should be retained through modification or the creation of a new tool or adaptation of an existing survey tool. First, the population should be given the opportunity to provide information on the problems and needs that matter to them most. Second, the survey should be programmed to trace the linkages between problems, needs, resources contacted, and whether resources were able to satisfactorily address the most important problems and needs. Advances in technology make these connections possible in ways that could not have been done before in paper surveys. This strategy provides more information than surveys typically capture, but it is more economical than large-scale focus groups. Some existing recurrent surveys already contain some of these components and are already web-based: They could be modified so that they, too, could link the problems items, the needs items, and the resource items. Third, the tool should capture the full range of resources that service members or spouses may have used, not just military resources. The inclusion of such options as personal networks, private resources, and other government and community resources helps military leaders learn whether those who do not use military resources are having their needs met elsewhere or whether those needs are unmet.

What Are the Obstacles to Implementation and How Should They Be Managed?

To benefit from the cohesive design of the proposed survey, the assessment should be implemented on a large scale (e.g., battalion, base, major command, Service, combatant command) and administered via the Internet. Smaller-scale implementation will provide useful information in each of the categories of problems, needs, and resources, but they will lose the value of linking top problems with top needs and resources used because too many response "cells" would be empty or too small to make meaningful statistical analyses possible.[2] Smaller-scale implementation (e.g., a company, a flight, a task element) would also prohibit complex analyses by demographic characteristics because of human subjects protections. Detailed descriptions of individuals (e.g., a report of responses from married Asian Sergeant Majors in a particular rifle company) could reveal identities to unit leadership along with their survey responses and thus would compromise their privacy. In smaller surveys, the results could be displayed by gender, then separately displayed by race and ethnicity, then separately displayed by collapsed rank categories, but not by all of those demographic variables simultaneously. Still, researchers could report the results of regression analyses revealing whether the responses of any specific subgroup were significantly different from those of their counterparts (e.g., whether minority-race enlisted males responded differently from other survey participants). For policymakers who wish to focus on a subset of problem types (e.g., child-related), a smaller-scale survey may still yield data that can be linked across survey sections because the branching will not become as elaborate.

To be able to inform decisionmakers at the Service or DoD level, a needs assessment must control for possibly influential characteristics of particular installations, such as base size, deployment patterns, or proximity to major metropolitan areas. Because of the elaborate and dynamic branching of the survey instrument—questions asked are based on previous responses—administration by paper is not feasible. In the pilot test, 100 percent of respondents chose to log on to the online survey option rather than call in to take the survey by telephone. For those without home Internet access, the military could give respondents on-base access or information about nearby locations that provide free access. The cost of administering a large-scale telephone interviewer–initiated survey design that would allow for the degree of branching and level of detail about problems, associated needs, and associated efforts to meet those needs

[2] For example, one "cell" for analysis might be single enlisted Soldiers whose top problems included their child's well-being and whose top needs for that problem included counseling and who turned to a private counselor for help. Another cell might be the spouse of a Navy officer whose top problems included household and auto maintenance while the spouse was deployed, and whose top needs included a helping hand with those tasks, and who turned to the Navy Fleet and Family Support Center for assistance. Not only are these cells too small for statistical analyses, but analysts would be unable to include this level of detail in their reports because of privacy and human subjects protection requirements.

would be prohibitive. The Defense Manpower Data Center (DMDC) conducts surveys with some branching of survey items, but not to the degree we propose here.

The greatest implementation challenges lie in participant recruitment. Unit and installation commander endorsement and promotion of the assessment can greatly facilitate survey participation by verifying its legitimacy to a population that may be rightly wary of solicitation and busy trying to meet competing demands for their time. Commanders can also promote a positive response through actions such as permitting service members to participate during the workday and providing the survey team with access to contact information for service members. Part of the challenge in reaching spouses stems from missing or inaccurate contact information in the personnel data files: Unit or family support group leadership may be able to help by soliciting more-current contact information from service members.

What Types of Results Are Possible, How Should They Be Reported, and to Whom?

The data could be analyzed in myriad ways, depending on the priorities of the sponsoring command or organization. The data could reveal the full range of problems from the perspective of military personnel and their families and then show their highest-priority problems. It could also reveal the population's beliefs about what needs spring from those most significant problems. From the full range of perceived needs, the survey also asks which needs the service members and their families believe are most important. Decisionmakers could use these results either to ensure that their programs address each top priority problem-needs combination (e.g., the perceived need for education to manage problems with personal well-being) or to educate the population about the superior or complementary benefits of other approaches for managing those problems (e.g., the effectiveness of counseling to address particular well-being issues).

The survey data could provide information beyond the level of general user satisfaction with military services. The data should be analyzed to reveal which military and nonmilitary resources, if any, the respondents turned to for help with their most significant problem-needs combination. Because not all problems and not all needs can be addressed through military resources—there are limits to what they can provide—it is important that resources are devoted to addressing the unmet needs for problems that military personnel and their families deem most important. Program managers can benefit from learning whether there are problem-needs combinations that their programs are designed to address but for which people do not turn to military resources. This may not be a problem: Community or private resources may be preferred and able to meet military member and family needs. However, if respondents are not tapping into any resources for help, or if community or private resources are unable to meet their needs, program managers may need to do more to make people aware

of the specific services they provide. Program managers should also look at responses about positive and negative characteristics of their programs. If, for example, survey participants at particular bases report financial problems, a perceived need for financial education/counseling, and long wait times to receive financial education/counseling, program managers might choose to increase the frequency at which those services are offered, add or train more staff in those skills, increase community referrals, or invite external financial advisors to make on-site visits.

Rather than an average satisfaction score for base or unit services, this survey can reveal strengths and weaknesses across various types of problems and needs. A program may receive many positive ratings for satisfactorily addressing certain problem-need combinations but fewer positive ratings for other problem-need combinations that respondents have deemed a top priority. This type of feedback gives program managers more specific information about where they may need to enhance their services. Or if respondents were turning to the wrong resource for help, the survey can reveal where the military should do more to educate its population about the appropriate resource for those unmet problem-need combinations.

We must not assume that only those who report using military resources are having their needs met. The survey results can provide a sense of how frequently service members and their families are turning to private or community resources for help and whether those alternatives are actually able to help.

Finally, the survey should be able to trace whether unmet needs in general are associated with satisfaction with and commitment to military life—specifically, whether certain types of unmet needs are more likely than others to have a negative impact on the attitudes of service members. Existing surveys link substantive item responses to satisfaction and commitment items, but not in a way that provides details on which organizations at which locations need to address which shortcomings to better meet the needs of service members and their families. These results can provide additional information to help military leadership prioritize where to focus their efforts, given that their resources are not unlimited.

To provide the most useful feedback to multiple levels of leadership, RAND recommends using the Air Force Chief of Staff's Climate Survey model to report survey results. In this survey, reports for all organizational levels—squadrons, groups, wings, major commands, and the Air Force as a whole—are provided to each level of leadership. But the leaders are only given the aggregate results for the units below them, so that the results are used for improvement of leaders' organizations and not for grading their subordinate leaders, which could run counter to commanders' promoting survey participation. For smaller units, reports by demographic variables are not specific enough to permit inference of individual identities. Results of the RAND needs survey should be shared not only with various unit and installation/ship commanders, but also with the organizations that provide support services, such as chaplains, medical professionals, spouse support groups, and community services. Dissemination

could also inform support providers that operate across the Services, such as Military OneSource and the Military Family Life Consultants Program.

Additionally, in the Air Force Climate Survey model, commanders are provided context with which to interpret their organization's results. The reports from the biennial survey display the responses for each organization over time (many items on the survey remain the same from year to year to enable this feature), and also provide commanders current results for comparable organizations. Without this context, commanders may be at a loss to discern whether their results are typical or the degree to which they may need to take action or further investigate climate issues at the local level. Ideally, this survey would be repeated for units and installations longitudinally to track trends and assess whether new initiatives are having the intended impact on the welfare of military members and military families.

Are There Other Applications of the Framework? Can the Instrument Be Adapted for Other Purposes?

The overarching framework could be applied to other types of research questions as well, such as the operational problems, needs, and resources for military personnel serving in war zones. The content of the survey instrument offered here could easily be adapted to other populations or purposes. It could be modified to address other populations, such as veterans and their families, other DoD personnel (e.g., Guard and Reserve) and their families, or wounded service members (as RAND has proposed elsewhere). The individual questionnaire items could be modified to reflect emerging or declining concerns and needs and capture changing resources available to help personnel or their families. Survey items could delve in more detail into particular issues (e.g., well-being), needs (e.g., various forms of professional counseling), resources (e.g., individual programs within Marine Corps Community Services), or perceived barriers or bridges to accessing services (e.g., more details about a program's reputation or who recommended the services). Existing surveys could be adapted as well. As long as the overarching framework and interrelated survey item design are preserved, the new methodology can be adapted in a variety of ways without compromising its utility.

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Abbreviations

ACS	Army Community Services
AER	Army Emergency Relief
AFRC	Airman and Family Readiness Center, formerly Family Support Center (FSC)
AVF	all-volunteer force
DMDC	Defense Manpower Data Center
DoD	Department of Defense
EAP	Employment Assistance Program
FMWR	Family and Morale, Welfare and Recreation (Army), formerly MWR
FRG	Family Readiness Group
FSG	Family Support Group
GAO	Government Accountability Office
MCCS	Marine Corps Community Services
NMFA	National Military Family Association
PCS	Permanent Change of Station
PDHRA	Post Deployment Health Reassessment
PTSD	post-traumatic stress disorder
WWII	World War II

CHAPTER ONE

Introduction and Study Overview

As the American military matured during the 20th century, it placed more and more emphasis on military families. The growth in family support programs was sustained more by the presumption that the programs were having the desired effect than could be justified by hard analysis. Moreover, the selection of what programs to field was not backed up by a careful consideration of the programs military families needed. As we discuss in Chapter Two, military family programs evolved despite the limited evidence that current programs are effective. We note the central role that "meeting the needs of military families" has in policy and directives and the fact that today we lack the tools to determine whether existing programs—military or nonmilitary—are successfully addressing the greatest needs of military personnel and their families.

If, as required, the Services must design programs that meet the needs of military families, they need to update their research approaches accordingly. Recent Service and Department of Defense (DoD) surveys have focused more on government programs than on families and have provided limited information about what families need and how they cope with the significant problems they face. RAND has developed a new cohesive framework and accompanying instrument to meet the challenge of placing the needs of military personnel and their families at the center of the analysis. This approach also enables a link between needs and the source of those needs, resources used and not used, the impact of resources, and satisfaction with military service.

In the following chapters, we discuss why a new approach to understanding family needs is required, the details of the new approach, how it was implemented, and lessons learned for its future use. In Chapter Two, we discuss how DoD policies toward families have evolved over time with the development of new programs after the advent of the all-volunteer force, policies that were supposed to meet the needs of military families. Personnel officials, however, did not have the tools to determine whether the selection of programs was in fact meeting the needs of military families, no less the tools to determine if the individual programs were cost-effective. Existing personnel survey instruments generally asked about program utilization and program satisfaction, but did not provide detailed information on whether those programs have been effective in meeting critical needs of military families, as defined by those families. This led us to

suggest a new methodology that focuses directly on families and their problem-related needs. In Chapter Two, we also describe the framework for this new methodology.

In Chapter Three, we lay out the logic for the new methodology and how we used the framework to build a web-based survey instrument. Importantly, the content of the survey instrument was based upon an extensive review of the literature concerning military families and was honed by working with focus groups to validate the logic and refine the language that was used in the survey. In Chapter Four, we discuss the survey instrument in detail and examine the links between the various parts of the survey, and in Chapter Five, we explain how we tested, refined, and assessed the prototype survey instrument against other survey instruments. Our sponsors wanted to know if this was really a new instrument or whether the information it provided was already available from other surveys. We reported that although this instrument is unique and focuses on the problem-related needs of our families, it offers limited information on programs not designed to meet critical family needs.

In Chapter Six, we discuss the hurdles that implementation of this methodology will likely have to address. Finally, in Chapter Seven, we provide examples of how the survey results could be used by personnel managers to inform their decisions as to what programs are best meeting the critical needs of military families and what family needs are going unmet.

Appendix A contains a copy of the survey developed in this study, which could be used basically as is or in a modified form to accommodate various target populations, sponsoring organizations, substantive focus, or changes from the time this survey was developed.

Appendix B contains, for background purposes, the focus group protocols used in the creation of this survey. It also shows how the logical framework behind the survey can undergird qualitative research efforts as well.

Finally, the monograph includes a bibliography weighted predominantly toward the more-recent (post–Cold War) literature on well-being and quality-of-life issues for military personnel and their families.

CHAPTER TWO

Background: DoD's Policy Toward Military Members and Their Families over Time

The individual-level problems and needs of military members and their families have not always been a top priority for the armed forces. As the quality of life and well-being of service members and their family have grown among national priorities, so have the size, number, and diversity of policies and programs to support them. Despite repeated calls over the years for assessments to ensure that policies and programs match personnel and family needs and produce a demonstrable link to desired outcomes, DoD still lacks adequate approaches and data to do so.

DoD Commitment to Military Families Has Grown Significantly Since World War I

Prior to the mass conscription of World War I, the military had little incentive to support service members' families and seldom provided benefits to families (Rostker, 2007). For example, in the regular Army of the later half of the 19th and early 20th centuries, married enlisted Soldiers were not eligible for base housing and the Army offered family housing benefits only to senior officers. When Soldiers were assigned a permanent change of duty station (PCS), the military did not provide transportation for their families to move with them. Married men were discouraged from serving, and reenlistment for married Soldiers was obstructed. These examples contributed to the sentiment, "if the Army had wanted you to have a wife, it would have issued you one."

These policies changed when the nation mobilized for World War I. Although married men were generally excluded from conscription, the government provided services to the draftees who were married, such as family allotments and voluntary insurance against death and disability. During World War II (WWII), the demands for personnel made it impractical to exclude married men from the force (Wickham, 1983). Congress provided married service members monthly family allowances for wives and for each child. In 1942, the Secretary of War instituted the Army Emergency Relief (AER) program, which provided grants or interest-free loans to Soldiers and their families in need of financial assistance during crises or emergencies.

Shortly after the Korean War, low retention rates prompted studies of the impact of family life on Soldier careers. In 1954, Operation Gyroscope focused on alleviating problems associated with Army family life in order to improve retention rates (Albano, 1994). Although the program was discontinued in 1960 due to its high cost and ineffectiveness in improving retention rates, it provided a foundation for housing, medical care, and other services for military families (Whitworth, 1983).

The Cold War era Army was much larger than the pre-WWII Army, and by 1960 there were more military family members than military personnel (Goldman, 1976). Despite this growth in the number of dependents, the Army was slow to consider the concerns of service members' families. At the inception of the troop buildup for Vietnam in 1965, however, the Army Community Services (ACS) organization was developed as the Army's first attempt to provide an umbrella approach for family support (Wickham, 1983). Another initiative to provide formal support to military families occurred in 1966 when the Civilian Health and Medical Program of the Uniformed Services (known as CHAMPUS) was created to allow military families living away from military facilities to receive medical care (Wickham, 1983). The Army was not alone in expanding its support to families. For example, in 1970, Admiral Elmo Zumwalt, Chief of Naval Operations, established the Navy Family Ombudsman Program to facilitate communication between the command and Navy families (OPNAVINST 1750.1D).

The all-volunteer force led military leaders to pay even greater attention to families, although support via federal programs and policies only gradually increased (Shinseki, 2003). On the eve of the all-volunteer force, the *Fiscal Year 1971 Department of the Army Historical Summary* did not directly discuss military families, although it did reference a shortage of housing units for eligible service members and their families. In 1971, 44.4 percent of active-duty enlisted service members had dependents; by the end of June 1977, that number had grown to 51 percent (Rostker, 2006); as of 2010, the number was 59 percent, with 62 percent of the total active duty force having dependents.[1] By 1978, the Army had recognized these changes in force composition and acknowledged that the Quality of Life Program, originally established to "improve services and activities for enlisted personnel in their daily life," needed to be expanded (Boldan, 1982). In 1979, the Army established a family separation allowance for grades E-1 to E-4 (Brown, 1983).

In the belief that that military readiness and performance are dependent upon Soldiers' quality of life, the Deputy Chief of Staff for Personnel made a commitment to the Army family and vowed to improve efforts to support them, resurrecting the old WWII slogan, "the Army takes care of its own," but in this case, redefining "its own" to include family members (Brown, 1983). Between 1979 and 1982, the U.S. Navy, Air

[1] Data obtained through the Defense Manpower Data Center Joint Manpower Information System.

Force, Marine Corps, and Coast Guard followed the Army's example by establishing family support centers (Harrison and Laliberté, 1997).

During the early 1980s, discontented Army spouses called on the Army to address their unmet needs through greater support to Army families. In October 1980, a grassroots movement resulted in the first Army Family Symposium, sponsored by the Army Officers' Wives Club of the Greater Washington Area and the Association of the United States Army (Stanley, Segal, and Laughton, 1990). The spouses who organized the conference raised four areas of concern with Army leaders: medical, relocation, family support and role identity, and education and youth (Stanley, Segal, and Laughton, 1990). At this meeting, the Family Action Committee was established, followed shortly thereafter by the founding of the Family Liaison Office within the Office of the Deputy Chief of Staff for Personnel that would oversee all family-related issues. In September 1981, the Army Family Life Communications Line at the Pentagon was established by the Adjutant General's Office. This office also developed a quarterly family newsletter to be distributed to Army families across the globe. At that time, little systematic research on Army or military families was available to inform leaders on how best to support families in an all-volunteer military.

In 1983 the Army Chief of Staff, General John A. Wickham Jr., published a landmark white paper, *The Army Family,* which argued that family issues were central to retention, readiness, and mission success and as such, deserved greater support from the military organization. That paper led to the creation of such initiatives as the Army Family Action Plan, Army Family Team Building, and the evolution of Family Support Groups to the more institutionalized Family Readiness Groups (FRGs) (Shinseki, 2003, p. 1).

Commitment to military families was further institutionalized across the Services with the 1985 Military Family Act (Title VIII of the Department of Defense Authorization Act for Fiscal Year 1986), which established an Office of Family Policy in the Office of the Secretary of Defense. This office was responsible for coordinating family-related programs and activities of the military departments. The law also authorized the Department of Defense to make recommendations to the secretaries of the military departments about programs and policies associated with military families (GAO, 2001).

When U.S. service members were deployed to Iraq with Operations Desert Shield and Desert Storm (the Persian Gulf War), the ACS created 24-hour Family Assistance Centers at seven stateside posts from which many troops deployed. These centers housed chaplains, lawyers, relief workers, and other social service workers to give information and counsel to families of the deployed. Toll-free hotlines were operated to serve the needs of the families of Reservists and installations lacking a Family Assistance Center. During that time, the Army realized that the family members left behind had questions and problems and many did not know where to turn for answers or assistance. At that time—the mid 1990s—66 percent of Army personnel were mar-

ried and 8 percent were single parents. Therefore, the Army established more family support groups and declared quality of life a top priority for the Army, ranked third in importance (behind readiness and modernization) (Reeves, 1998).

After the Gulf War and throughout the 1990s, there was an increased demand on the armed forces for deployments to Bosnia, Kuwait, Haiti, Honduras, the Sinai, Macedonia, and other locations, and more personnel were spending time away from home. Research during this period found that spousal attitudes toward the military were linked with service member reenlistment intentions (Bourg and Segal, 1999; Lakhani, 1995; Lakhani and Fugita, 1993). It also showed that actual retention behavior was related to spousal support for continuing a military career (Rosen and Durand, 1995) and to spousal attitudes toward the military lifestyle (Bruce and Burch, 1989; Mohr, Holzbach, and Morrison, 1981; Orthner, 1980). A survey of troops conducted in the late 1990s at the height of deployments to Bosnia indicated that many service members were experiencing marital and/or family stress as a result of repeated deployments (Castro and Adler, 1999). In response, the Army created 21 Family Assistance Centers to provide deployment services to families and peace of mind for deployed Soldiers.

Support for military families and military personnel quality of life continues to grow. In FY 2000, Congress allotted $739 million for the DoD's family programs supervised by the DoD Office of Family Policy. The funds supported programs offering information and referral services, financial management education, counseling, spouse employment assistance, domestic violence treatment and prevention, childcare, and other services, as well as 260 family support centers (GAO, 2001). DoD subsequently created Military OneSource, a 24/7/365 call center and website that can guide military personnel and spouses to a wide array of resources, including free confidential counseling in their local community. Another new program, Military Family Life Consultants, also provides opportunities for free short-term counseling from professionals especially trained to address military-specific concerns, such as deployment-related issues. In 2007, the Secretary of the Army, Chief of Staff of the Army, and Sergeant Major of the Army signed the Army Family Covenant, a formal recognition of the sacrifices made by Army families and a pledge to improving such elements as housing, health care, childcare, and education and employment opportunities for spouses. The covenant was paired with a $1.4 billion commitment in 2008 for quality of life improvements (Lorge, 2007). The Secretary of the Air Force and Chief of Staff of the Air Force designated 2009–2010 the Year of the Air Force Family, with a focus on improvements to housing, childcare, schools and medical care (Parker, 2009).

In 2009, the National Leadership Summit on Military Families brought together researchers, military family members, senior military family policymakers, family program leaders, and staff from across the Services (Booth, Segal, and Place, 2010). During the summit, participants agreed that among the greatest challenges were strains due to wartime deployments, psychological health of military families, barriers to access-

ing family programs and services, inconsistency of programs and services from base to base, difficulties ensuring that all families are aware of the resources available to them, and frequent relocation (Booth, Segal, and Place, 2010). The attendees also participated in "discussion and debate around how well current programs are aligned with the needs of families, the types of outcomes that programs should be expected to deliver," and ideas about how to improve programs' abilities to meet their goals (Booth, Segal, and Place, 2010, p. 11). Among their recommendations was a call for improved evaluation of support programs, including "assessing the needs of families at different stages in the life course" so that programs can target those specific needs (Booth, Segal, and Place, 2010, p. 12).

How much do we know about which programs are most effective in meeting the needs of service members and their spouses and whether the full range of needs are being met? What evidence do we have about the effect of the programs on such outcomes as performance, readiness, and retention? The answer is surprisingly little.

Evidence Linking Support to Military Personnel and Families to Outcomes Is Limited

From the very beginning of the modern quality of life and family programs, policymakers have been asking for some level of proof that these programs are cost-effective. The Department of the Army Historical Summary for FY 1981 noted that "[t]he Quality of Life Program, after three years of planning and programming, at last received enough funds to make a noticeable difference for Soldiers and their families" (Hardyman, 1988, p. 108). With costs projected to run $1.6 million over the next six years, the Summary noted: "Quality of life efforts have been handicapped in the competition for limited resources by the Army's inability to quantify the benefits derived from implementing the initiatives. There was no obvious way to measure Soldiers' satisfaction and its effect on Soldier commitment" (Hardyman, 1988, pp. 108–109). With a sense of hope, the Summary told of the Army's hiring of "a consulting firm to develop a model to forecast the effects of quality of life initiatives and the necessary levels of funding to achieve the greatest improvement in retention" (Hardyman, 1988, p. 109).[2] The following year, the Army established the Army Family Liaison Office to gather input from families and to better prepare them for Army life (Shinseki, 2003, p. 3).

In 1998, RAND recommended that DoD build an agenda for its extensive and expensive personnel support system, which was costing several billion dollars each year (Buddin, 1998). The report called for DoD to chart the relationship between its programs and such outcomes such retention and improved quality of life. To do so, author

[2] We were unable to locate a copy of any such report from that consulting firm, or reference to one, and the firm no longer exists.

Richard Buddin argued that both objective, verifiable data and subject self-evaluations that may factor into organizational commitment were needed. He further asserted that building an effective agenda for personnel support programs required more detailed individual well-being data, program usage data, and program accounting data than were being collected.

In April 2002, DoD published *The New Social Compact*. The heart of the document was a reciprocal understanding between DoD and service members and their families. The document declared: "Service members and families together must dedicate themselves to the military lifestyle, while the American people, the President, and the Department of Defense must provide a supportive quality of life for those who serve" (Molino, 2002, p. 1). The National Defense Authorization Act for Fiscal Year 2003 required that "[t]he Secretary of Defense shall every four years conduct a comprehensive examination of the quality of life of the members of the armed forces (to be known as the 'Quadrennial Quality of Life Review')."

The 1st Quadrennial Quality of Life Review, *Families Also Serve*, was issued in May 2004. The document commits DoD to "working hard to help military families deal with the stress attributable to separations and a range of uncertain war-time conditions" (Under Secretary of Defense [Personnel and Readiness], 2004). It reported that, despite the general recognition that quality of life "impacts the retention of service members and the readiness of the armed forces . . . research that can inform policy on these issues is surprisingly inadequate" (Under Secretary of Defense [Personnel and Readiness], 2004, p. 187).

There are several meanings to the phrase "inform policy" as used in the 2004 Review. At one level, some policymakers continue to ask, as they did in 1981, what they are getting for the money spent on these programs. As noted in the Review, there is a general acceptance, mostly based on anecdotes, that quality of life affects the retention of service members and the readiness of the armed forces. On another level, it is the individual program that needs to be assessed to determine what is and is not working. A recent study by the National Military Family Association confirmed that "[m]any programs and services are in place to help military families, [but concluded that] these programs, however, are inconsistent in meeting families' needs" (Wheeler, 2004, p. 8).

Understanding Family Needs Is a Central Feature of Today's DoD Policy

DoD Family Policy[3] is designed to "provided a quality of life . . . (to DoD personnel and their families) that reflects the high standards and pride of the Nation they

[3] See Directive No. 1342.17, *Family Policy*, Washington, D.C.: Department of Defense, 1988.

defend, and that this policy be achieved by working in partnership with DoD personnel and their families, recognizing their role in the readiness of the Total Force" (U.S. DoD, 1988, p. 2). The *needs* of service members and their families are treated as inextricably linked. By direction, the "family support systems shall be monitored and evaluated by the Military Services to ensure their accessibility, effectiveness, and responsiveness to the *needs* of DoD personnel and their families, (and) military family research and program evaluation shall be directed toward an increased understanding of . . . (the) strengths, *needs*, and demographic characteristics (of DoD personnel and their families)" (U.S. DoD, 1988, p. 3). The Secretaries of the Military Departments were directed to ensure that these family support systems are "accessible, effective, and responsive to the *needs* of DoD personnel and their families" [emphasis added] (U.S. DoD, 1988, p. 4).

In 2001 the GAO[4] concluded that "despite the emphasis in DOD family policy regulations that military family research and program evaluation be directed at understanding the *needs* of DOD personnel and their families, there is no authoritative description of military community and family *needs* across the diverse military population" [emphasis added] (Kingsbury, 2001, p. 14). The GAO also noted, "There is no authoritative study or body of research concerning how best to conduct military family *need* assessments" [emphasis added] (Kingsbury, 2001, p. 28). In 2009, the spouse of an Army colonel published an op ed piece in the *Washington Post* making this point: "The military's inability to assess the wars' effects on its families and to adapt and restructure its approach has frustrated families in the 'trenches'" (Kaufmann, 2009). She further argued that a "knowledge gap results in delayed responses, reactive policies, misdirected resources and, ultimately, too many families falling through the cracks" (Kaufmann, 2009).

With the wars in Iraq and Afghanistan placing greater demands on military families, the Army reemphasized the importance of support for Soldiers and their families with a series of Army Well-Being Initiatives. The Secretary of the Army wrote:

> Soldiers are the centerpiece of the Army—without you nothing is accomplished. You are the best our Nation has to offer and I cherish your dedication and your sacrifice. This leads me to my first priority, which is the *Well-Being of Soldiers and their families*. Nothing that I do as the Secretary of the Army is more important than this [emphasis added] (Harvey, 2009).

> According to the Army, their well-being programs "support the *needs* of the Total Army Family before, during and after deployment. Army Well-Being holistically integrates and continuously assesses services and programs that provide for the

[4] See Nancy Kingsbury, *Military Personnel: Actions Needed to Achieve Greater Results from Air Force Family Need Assessments*, Washington, D.C.: General Accounting Office, 2001. GAO has since changed its name to the Government Accountability Office.

> *needs* of our people. . . . In the past, the Army's programs concentrated only on the quality of life of our people—defined as a standard of living to which individuals, communities, and nations strive to meet or exceed. . . . Army Well-Being . . . address(es) emerging *needs* of our transforming Army. . . . The objective of Army Well-Being is to address the physical, material, mental and spiritual *needs* of each member of the Total Army Family [emphasis added] (Harvey and Schoomaker, 2006).

Limitations in Approaches to Learning About Service Member and Family Needs Lead to a New Approach

Decades of research have built up a knowledge base that informs policy and programmatic decisions. Today, surveys and focus groups are the primary research strategies used to learn about these quality-of-life and family support programs and the needs of our service members and families. Because of the extent of research efforts in the all-volunteer era, knowledge about the experiences and attitudes of military personnel and spouses has grown significantly. Military leaders already understand that relocations, deployments, work schedules, and other demanding aspects of military service can place stress on military community members. They also understand that use and satisfaction with military programs vary and that spouses may not be aware of all that is available to them or may not be able to access services. In this section, we discuss different approaches that capture aspects of service member and family problems, needs, resource utilization and satisfaction, and satisfaction with military life. We focus here on the methods: Chapter Three conveys highlights of the substance of this work.

Resource Allocation Data Analyses Are Unable to Control for Influential Factors Not Captured in the Datasets

Occasionally, when discussing our research project with different contacts in the DoD leadership, we were asked about a research approach that would link the availability and utilization of base services to such outcomes as retention or performance. The quality and amount of data that would be needed to account for confounding factors, such as variation in services available in the community or in stresses on the population (e.g., base location, deployment burden), are prohibitive. We know of one such prior attempt at RAND in 2005 to link the quality of Army installation facilities to retention; however, it was unable to demonstrate any link, in part because the data did not fully capture the factors that contribute to retention decisions. That effort concluded that a new survey design would be a more effective way to address the influence of infrastructure and support services on Soldiers' decisionmaking.[5]

[5] Conversation with John Ausink, RAND Corporation, Arlington, Va., June 15, 2010.

Quasi-Experimental Evaluations of Programs

We identified a small-scale quasi-experimental evaluation of a program in the early 1990s (Ford et al., 1998). Researchers evaluated an experimental Family Systems Therapy (FST) program, a brief treatment intervention consisting of a combination of structural, strategic, intergenerational, and behavioral family therapies designed to reduce stress related to nonwar deployment in Europe during Operation Desert Storm (ODS). The intervention was provided to Soldiers and Marines and their families, with a control group that did not receive the intervention. The timely preventive and therapeutic intervention appeared to be helpful in confronting the impact of the deployment and readjustment. The FST intervention was associated with clinically significant reductions in stress and psychiatric symptoms and improvement in family systemic adjustment. An approach like this can capture whether a particular program is having an impact on the problems it is designed to address, making an important contribution beyond asking users whether they are satisfied with a program. Ideally this type of evaluation would be conducted on a prototype version of a program before the intervention is launched Service-wide. Program evaluations, however, are not intended to serve as needs assessments, which is the approach we took. We are not proposing a substitute for evaluating whether interventions make a measurable difference in the lives of users compared with nonusers.

Surveys of Service Members and Spouses Have Not Placed Service Member and Family Needs at the Center

Surveys provide a great deal of what we know now about overall attitudes toward service member and family support programs. We highlight here a few major surveys that capture information about military members' and their spouses' utilization of and satisfaction with existing programs and services.

Recurrent Service and DoD Surveys. The Services routinely conduct surveys to assess the attitudes of service members, and a less frequent survey of spouses as well. Some of the items are repeated across surveys over time to facilitate the identification of trends. Three prominent examples are the Air Force's Community Assessment Survey, the Survey of Army Families, and the DoD's Status of Forces Surveys.

Approximately every two years, the *Air Force Community Assessment Survey* asks detailed questions to understand the needs of Air Force personnel for programs and services. The GAO evaluated a much older version of the Air Force's needs assessment program and found that it did not meet criteria recognized as important for needs assessments, such as using benchmarks to determine whether needs have changed or emerged. As such, it concluded that the Air Force's needs assessment strategy may not be an effective indication of how funds should be spent and which programs should be created, sustained, or terminated (GAO, 2001). The survey has evolved since that report was published. We reviewed the 2008 version and found that it captures a great deal of information on a variety of problems, service member well-being, the strength

of informal support networks, leadership involvement, and satisfaction with various aspects of the Air Force community. The survey captures both formal (program) and informal (e.g., neighbor) support. The web-based results reporting system allows installation leaders and service providers to compare their results against the average for their major command, thus providing valuable context for understanding the results. In 2011, survey invitations were sent to a random sample of single and married active duty and reserve Airmen, spouses of Airmen, and civilian personnel at 80 Air Force installations worldwide. The 2011 version is also quite extensive and valuable for many purposes, but it maintains a different focus from the instrument we propose. The survey covers a lot of ground but does not focus on needs. The set of items on Air Force services did not link those responses to specific reported problems to allow for an understanding of how or whether they are related.

The *Survey of Army Families*, conducted by the U.S. Army Family and Morale, Welfare, and Recreation Command (formerly the Community and Family Support Center), is administered to civilian spouses of active-duty Soldiers of all ranks (Orthner and Rose, 2005). The survey has been conducted every four to five years since 1987 and focuses on topics related to the quality of life and well-being of Army families (satisfaction with the Soldier's job and Army life; financial concerns; participation and satisfaction with Family Readiness Groups and Family, Morale, Welfare, and Recreation programs and services; retention intentions; and the impact of deployment on the family). In the 2004–2005 version of the survey, three distinct surveys were created for individuals with military spouses who are currently deployed, have deployed and returned, or have never deployed. This survey has provided the Army with some detailed information useful for the design of particular Army programs.

The *Status of Forces Surveys* are routinely conducted as part of the Human Resource Strategic Assessment Program (HRSAP) administered by the Defense Manpower Data Center (DMDC) for the Office of the Under Secretary of Defense for Personnel and Readiness (OUSDP&R). The active-duty surveys target service members of all pay grades in the Army, Navy, Marine Corps, and Air Force and are conducted three times a year; surveys of Reserve forces, spouses of military personnel, and civilian personnel are also conducted, but on a less frequent basis. In the active-duty version, although some content is standardized across all surveys (e.g., demographics, satisfaction, retention intention, stress, Military OneSource use), other content rotates according to a long-term content plan, and new content is occasionally introduced as well. The Summer, Odd-Year surveys are slated to focus on on-base programs and services; the August 2009 survey is the most recent available version of this (DMDC, 2010). In this survey, respondents are asked whether they used particular services (those focused on education, recreational programs and facilities, the commissary, the local exchange, medical and dental services), with the options to reply "yes," "no," and "no, not available." The quality of some of these services is assessed, but there is no indication of whether a service was not used because there was no need, whether the need was

met elsewhere, where else the need was met, whether a need went unmet and why, or whether using the service met a need. The items on the Military OneSource survey ask how useful the service was in each of several problem areas (such as personal and relationship issues, deployment and reunion, relocation, and elder care), but hidden in the "not applicable" response is whether the question was not applicable because there were no such problems or associated needs, whether there was a need but Military OneSource was not used, or whether a need was met elsewhere or went unmet.

Although the kinds of questions common to these Service and DoD surveys are helpful in getting a general understanding of how spouses and/or service members view support services and aspects of their well-being, they do not provide enough details about the needs of members or their families, or their experiences with support services in relation to those needs, to make critical decisions about how best to manage the program. The surveys do not help managers understand why some respondents did not receive support services or, of those who did, why some did not feel the services helped them. Nor are the latter two surveys helpful at identifying base-level variation, even though most of these services are located and managed by the local bases.

One-Time Administration Surveys. We also found examples of survey research focusing on a particular subset of issues and the programs designed to address them. In a smaller-scale effort focused on a particular program, one study evaluated the impact of participation in an Army Family Team Building course on Army spouses' perceptions of work-family fit and satisfaction with the Army as a workplace. Survey data from 69 spouses showed that participation in the Army Family Team Building course was associated with an increase in knowledge about the Army and the Army lifestyle; this increased knowledge was associated with an increase in satisfaction with Army life (McFadyen, Kerpelman, and Adler-Baeder, 2005).

We identified two studies that focused on spouse employment and spouse employment assistance programs (EAPs) (Bureika et al., 1999; Harrell et al., 2004). Both studies included spouses of Army, Navy, Marine Corps, and Air Force members, and thus evaluated the Employment Readiness Program (Army), the Spouse Employment Assistance Program (Navy), the Career Focus Program (Air Force), and the Family Member Employment Assistance Program (Marine Corps). The first study (Bureika et al., 1999) surveyed civilian spouses of junior enlisted military members in pay grades E5 and below about spouse EAP service, policies, and procedures. They gauged awareness of services, use of services, ratings of usefulness of services, and program satisfaction.

The second study (Harrell et al., 2004) conducted a more comprehensive study of EAP utilization and satisfaction. Harrell et al. conducted survey interviews via telephone or in person with spouses of military members of all Services and pay grades and found that most spouses were aware of the employment assistance programs at the time of their last job search. Similar to the findings described above, spouses of junior enlisted personnel were the least likely to be aware of the programs. Those who used the programs were generally satisfied, but many who were aware of the programs did

not use them, citing perceptions that they did not need the skills offered or that the programs would not be appropriate in their situation (whether this was accurate or not). When asked what employment and educational services would be most helpful to spouses, common answers were financial assistance with spouse education, increasing affordability and accessibility of childcare, and increasing spouse awareness of programs.

At least two research efforts have been made to evaluate the Morale, Welfare, and Recreation (MWR) Programs and Services—predecessor to Family and Morale, Welfare and Recreation (FMWR) (Nord, Perry, and Maxfield, 1997; Westhuis and Fafara, 2007). Both studies examine the impact of the MWR programs and services on satisfaction with military life; however, they do not determine whether the programs are effectively meeting service members' and families' needs. Nord, Perry, and Maxfield (1997) utilized the 1992 DoD Active Component Surveys to gain information about the attitudes and experiences of officers, enlisted personnel, and spouses about MWR programs and services, as well as other family support programs. The authors describe variation in types of services and programs utilized by military members and spouses. They found that military members and spouses most valued the commissary, the main exchange, 7-Day Stores, fitness centers, libraries, laundry services, temporary lodging facilities, tours and ticket services, and youth services; respondents reported dissatisfaction with housing office services, spouse employment programs, and childcare programs. The authors found that for members and spouses, utilization and satisfaction with the MWR programs and services were significant predictors of satisfaction with different aspects of military life; greater utilization of these services was associated with a higher level of satisfaction. Using the 2005 Spring Sample Survey of Military Personnel (SSMP), scholars (Westhuis and Fafara, 2007) examined the association between MWR use and desire to stay in the Army, unit cohesion, career issues, and satisfaction with Army quality of life. They found that for Soldiers, usage of MWR programs and services had a statistically significant positive relationship with desire to stay in the Army, unit teamwork/esprit de corps, career issues, and satisfaction with quality of Army life. Increases in MWR usage were associated with emotional attachment to the Army and desire to stay in the Army. Causality cannot be determined, however: It is possible that those with greater attachment to the Army are more interested in participating in recreational activities on base and with military peers than those who are not.

Focus Groups and Face-to-Face Interview Studies: Impractical for Large-Scale Data Collection

Focus groups can complement surveys and may develop explanations for some of the issues that surveys are unable to address. For example, a RAND study by Hosek, Kavanagh, and Miller (2006) attempted to explain the seemingly anomalistic behavior of deployed Soldiers who were more likely to reenlist than similar Soldiers who were not deployed. Focus groups with military personnel who had and had not been

deployed allowed the researchers to ferret out possible explanations for this quantitative finding that contradicted the conventional wisdom, providing new perspectives on the reenlistment decision that could be explored.

Other focus group research points to some of the obstacles to using services. One study employed focus groups with 175 Army spouses to evaluate the efficacy of current programs and policies in place for Army families (Caliber Associates, 2004). They found that spouses of junior-level enlisted Soldiers were much less likely to be aware of family programs than spouses of junior officers or mid- to senior-level enlisted Soldiers. Those who were aware of programs were often hesitant or unable to use them due to perceptions of stigma or other hurdles (such as lack of childcare). Caliber Associates also conducted focus groups with 65 Army spouses as part of a qualitative follow-up study of the 2004–2005 Survey of Army Families. The purpose of the study was to learn more about the function and effectiveness of FRGs; out-of-pocket, deployment-related expenses reported by spouses; and experiences related to childcare (Caliber Associates, 2006). Opinions about FRGs varied widely across units and posts. Some felt that the FRGs were well organized and beneficial; others suggested that they were poorly organized, noninclusive, and noninformative. Participants also expressed a desire for more affordable and widely available childcare services, suggesting that the available resources were insufficient.

The Defense Advisory Committee on Women in the Services (DACOWITS) conducted a series of 38 focus groups with 388 active-duty and Reserve service members and families in order to learn more about work-life balance issues (DACOWITS, 2005). They found that there was a lack of knowledge about available family support programs (such as Family Service Centers or Military OneSource) and the services that they offer; however, those who did use the programs reported high levels of satisfaction.

Another qualitative study employed interviews with 35 female spouses, the Rear Detachment Commander (RDC), the chaplain, the commander's wife, the psychiatrist, and the social worker of a particular battalion in order to evaluate the resources, conditions, and experiences associated with wives' adjustment to separation and reunion (Wood, Scarville, and Gravino, 1995). The authors noted utilization and satisfaction with Family Support Groups (FSGs, later known as Family Readiness Groups, or FRGs) and the impact of FSGs and other factors on adapting to separation of the military member from the family. They found that FSGs were beneficial in providing practical information, assistance, and enhanced informal networks and systems. Women who successfully adapted to separation (subjectively determined by interviewers) were more likely to indicate the importance of being employed, having a social support network of friends and family, and participating in family support group activities. Those who did not adjust well to separation cited pregnancy, health problems, loneliness, financial problems, and money problems as reasons for the difficulty. The authors note that this battalion was one of the first to have FSGs and that the battalion made a particularly strong effort to support women left behind.

Each of these qualitative research efforts provide pieces to the puzzle, such as potential obstacles to using services, specific challenges families faces, or satisfaction with services used. Also, focus groups are useful as one way to develop grounded hypotheses to guide analysis of statistical data or to formulate appropriate items for surveys. Focus groups, however, are not intended to provide a representative sample of an entire Service. Therefore, the insights they provide need to be rigorously tested before generalizations about the extent of their applicability to the larger population can be made. The GAO cautioned about focus groups, in the form of open forums: ". . . while useful for obtaining grassroots input, this process does not involve the use of representative surveys or random or representative selection of forum participants to ensure representative input about Army family needs" (Kingsbury, 2001, p. 26).

A Framework for a New Approach

The new approach we propose imports a concept long-established in ethnographic research—that of seeking to understand "members' meanings" (Emerson, Fretz, and Shaw, 1995). Individuals make decisions and take action based on their own interpretations of their circumstances. Although their interpretations may be based on incomplete or erroneous information, they nevertheless influence the meaning that people attach to interactions and events around them. Service members and their spouses evaluate their military experiences through their own lenses: their own sets of expectations, understandings about their experiences, and satisfaction with the military way of life.

To best support this population, the military's leaders need to understand the perspectives of military personnel and their spouses. If those perspectives are based on misinformation, the leadership has an opportunity to promote accurate information. If those perspectives reflect problems with the military support system, the leadership can learn how to adapt that system to better match the needs of the population. A wife may believe that her husband needs to attend an anger management class when he may actually be better served by professional counseling or substance abuse treatment. But she may not realize that her husband is depressed or abusing alcohol, so she will be looking for an anger management class. If the next class opening is months away, the situation may worsen, especially if she is unaware of other options or if her husband agreed to a class but not to counseling. If he is able to take an anger management class, the instructor acquires the opportunity to detect the underlying problems and help steer the husband to resources more likely to have an impact than the class and to address concerns he may have about the impact of receiving treatment on his career. This example illustrates that it matters what people *believe* they need—whether or not professionals would agree with them—because beliefs influence people's behaviors, which can lead to their needs being met or remaining unmet. Moreover, "needs"

—other than what is required for human survival (e.g., water, food)—are socially constructed, so pursuing an objective distinction between "needs" and "wants" is not fruitful. The perspectives of Service member and spouses should not be the only source of information that leaders collect and assess, but they should be one of the sources taken into account.

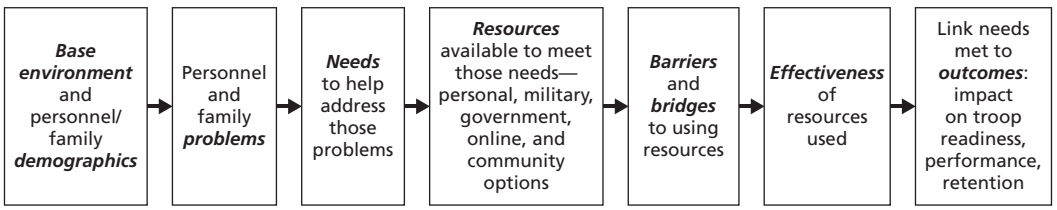
The perspectives of military leaders, program managers, and policymakers were also factored into our framework. People charged with the welfare of service members and their families generally operate in an environment of finite resources and competing demands. They must often make tough decisions about where the burden of budget or manpower cuts must fall, or where sacrifices must be made in order to support new programs or expand existing ones to solve urgent crises. Alternatively, military leaders or program managers may grapple with how best to allocate an influx of resources earmarked to promote the quality of life of military personnel and their families. Thus, a research approach that asks service members and their families to prioritize their problems and the associated needs can also help decisionmakers determine where best to devote additional funds or manpower.

Existing surveys already give leaders a sense of the prevalence of some of the challenges that military personnel and their families are facing and some sense of satisfaction with military services. We believe that the next step is to develop a more sophisticated means of soliciting perspectives from the military population: one that allows researchers to hone in on the greatest concerns and the more troubled populations. Qualitative research can provide a great level of sophistication but is not practical for large-scale standardized research.

We developed a conceptual framework to describe the process that incorporates the perspectives of both service members and their families, as well as the types of information that military leaders and professionals need to identify unmet problem-related needs. The final, revised version of this framework is presented in Figure 2.1.

We used this framework to structure focus group protocols and to construct a survey instrument that would relate problems to needs to solutions, barriers, and bridges that affect the selection and effectiveness of particular resources. This frame-

Figure 2.1
Framework for Assessing the Needs of Military Personnel and Their Families



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work also links the results to outcomes the Services are interested in, such as intention to reenlist, which can be asked on a survey, and performance, which would better be measured through analyses of performance evaluations or other aspects of service records.

Military personnel and their families operate within the context of their base environment, including such factors as population size, proximity to large urban areas, and operational tempo of the units housed at those bases. The GAO correctly suggests that understanding the base environment is essential to understanding how families cope with problem and how their needs are met. They note that "while DOD regulations do not explicitly require the services to assess and factor civilian resources in, but they do require the services to provide family support programs only to the extent that local area services are not available, accessible, affordable, or appropriate to meet the needs of military families. . . . DOD family support program officials said that it is important to link military families with community resources to meet their needs" (Kingsbury, 2001, p. 12). We started our framework with the base environment, which aligns with this observation.

Social characteristics are also a part of the relevant context for service member and family interpretations of their experiences. These include general demographic factors—gender, race and ethnicity, marital status, number of and ages of children, and level of education—as well as military-specific characteristics, such as Service, pay grade, years of military service, deployment experiences, and moves from one assignment location to another.

Within this context, service members and their families face problems, and their needs—particularly their most pressing needs—are a reflection of the problems they face. Some problems are prevented from the outset by a supportive military climate, effective support programs, or minimal stressors, for example. But reported problems are an indicator that problems have *not* been prevented. Not every problem that a service member or family member faces, however, rises to the level of creating a need. Military personnel and their families handle some problems by themselves in the course of normal life, but other problems become so great that the service member or family needs help in addressing them. That help may come in the form of external resources that can be used to help them resolve their problems or just moral support from a neighbor or relative. There is a wide range of potential solutions and resources that can be brought to bear. Some solutions come from people's own networks and resources, some from local community or nonmilitary government resources, and some are provided by the military. The ways service members and their spouses choose to solve their problems—the particular resources they use—are very important. To understand better why someone selects one set of resources and not another, it is useful to know about perceived barriers to those resources, such as associated stigma or difficulties accessing services. We must also learn whether service members and spouses believe the resources they contacted actually helped them meet their needs. Finally, the mili-

tary benefits by understanding the retention implications of meeting or not meeting the needs of military personnel and their families. The assumption is that all things being equal, military personnel who are able to meet their own needs and those of their families are more likely to continue to serve in the armed forces than those who cannot.

In the rest of this monograph, we document the process by which we developed a new approach to providing military leadership and policymakers information about the most pressing needs of its members and their families. The research questions were methodological in nature: What type of tool will better enable decisionmakers to understand and support the military community? What content and language are relevant to today's force and to the different types of people within it? What modes of administering the tool are feasible and advisable? What methods will encourage respondent participation? Are there potential obstacles to implementation, and if so, how could they be managed? How should the data be analyzed and reported, and to whom?

The next chapter describes the development of this research framework and related survey content.

CHAPTER THREE

Development of the Service Member and Family Needs Survey

In 2007, RAND set out to develop a new needs-focused survey instrument that would fill the gap not covered by existing instruments. Rather than focusing on the programs themselves, as previous surveys did with questions that asked about respondents' use of and opinions about specific programs, we focused on the population that the programs were meant to serve. The instrument was designed to understand the needs of service members and families who are coping with problems, how they attempt to meet those needs, and then, and only then, their degree of satisfaction with services used. We had no a priori expectation of what military personnel and their families would need to address their problems, how families were meeting those needs, or their use of services provided by the military. The government was only one of many potential service providers, and the instrument was designed to understand what services families used regardless of the institution that provided the services, why these services were selected, and why other services were not selected. In this chapter, we discuss the general concept of the new instrument and the framework that we developed to implement that concept.

Concept for a New Needs-Focused Survey Instrument

At the outset of the study, we envisioned the assessment instrument to be a survey—whether a telephone poll, an online or mailed questionnaire, or a personally administered question set—because a survey-like instrument is more affordable and appropriate than interviews or focus groups for large-scale and ongoing standardized assessments that can be used to track change over time and determine statistical significances between groups. We thought that the specific content of the survey should be research-based and informed by subject matter experts and professionals in organizations that support service members and their families. We envisioned an instrument that would be highly tailored to the language and issues of current concern to military families. Accordingly, we planned to test the concept first with focus groups and then field test the survey instrument at different bases.

Subject Matter Experts Inform Framework and Survey Content

The initial framework for this study was developed in a workshop of subject matter experts at RAND and was informed by previous studies in the field. The next step was to test whether that framework made sense and to determine what items should populate each of the framework sections. We wanted to ensure that the instrument was informed not only by issues and services that had been captured in previous work but also by any new ones that had emerged. Thus, we met with other colleagues and experts in the following organizations:

- Office of the Deputy Under Secretary of Defense for Military Community and Family Policy
- Deputy Chief of Staff of the Army for Personnel and Readiness
- Deputy Undersecretary of the Army
- Army Human Resources Command
- Army Community Services
- Personal and Family Readiness Division, U.S. Marine Corps
- Army Research Institute
- National Military Family Association
- Military OneSource.

Interviews and meetings with DoD and Service leadership and resource managers clarified the types of information they seek to make determinations about how well they are supporting service members and their families, what kinds of adjustments need to be made, and where to improve their efforts. They pointed out problems with existing survey efforts, such as results that cannot be analyzed by installation, that do not reveal trends over time, or that do not show whether programs are effective at meeting the full range of needs of all types of military personnel and their families.

Our interactions with the National Military Family Association provided insights into the concerns of spouses who affiliate with the organization or participate in its occasional online polls. Although this organization's information reflects a particular subpopulation of spouses active in military life, it provided yet another resource to ensure that our efforts were current and comprehensive.

Military OneSource is a relatively new resource that had not yet been discussed in the literature; it was a unique and rich source of information about service members and their families. Military OneSource is a referral and information center that service members and their spouses can contact outside of the chain of command. Thus, information about the types of calls it receives served as a source of information for our project about problems and needs that may be particularly sensitive and less visible to military officials. Telephone operators at Military OneSource are licensed mental health professionals who can provide immediate crisis counseling or can make referrals for counseling or other services (e.g., plumbing, childcare) in the community. The orga-

nization produces educational materials on a wide range of topics, such as parenting, mental and physical health, financial management, and the challenges of deployment. It also operates the Wounded Warrior Resource Center, with similar services but also coordination with organizations that specialize in supporting the war wounded. The diversity of issues on which Military OneSource provides support was a good match for the type of instrument we envisioned: one that focused on a wide array of problems and needs, from home repairs to mental health concerns.

For this effort, we took advantage of the opportunity to learn from some of the counselors and managers about the types of problems and needs that military personnel and their spouses from all four Services call or email OneSource about and the types of resources they catalog to use for referrals. Military OneSource tracks detailed information about all of its calls, so management was able to refer to those statistics when talking with us (we were not able to secure copies of those statistics) and give us a sense of which issues were at the forefront of service members' minds. We later returned to OneSource headquarters to hold two separate 90-minute meetings, one with eight of its counselors and one with six of its managers/supervisors, to solicit their feedback on the study framework and the initial draft of our survey instrument.

Drawing on Previous Research to Inform the Survey Development

Military families may cope with the same set of challenges that confront nonmilitary families, such as parenting issues, childcare, educational concerns, career choices, elder care, and financial concerns. However, some aspects of military life are unique, creating an additional set of problems and related needs (Drummet et al., 2003; Norwood, Fullerton, and Hagen, 1996). Segal has suggested that both the military and the family, as institutions, "make great demands of individuals in terms of commitments, loyalty, time, and energy; they therefore have some of the characteristics of . . . 'greedy institutions'" (Segal, 1986, p. 9). The bibliography of this report conveys the wide range of literature on military families we consulted, which influenced the content on the surveys. Some highlights from previous research efforts are presented here.

Although the armed forces do provide a steady income and generous benefits, some military families, particularly younger families of junior enlisted military members, struggle to pay bills and make ends meet (Harrell, 2001; Tiemeyer, Wardynski, and Buddin, 1999). Spouses of military members have previously identified a need for assistance with education and childcare to better enable them to secure desirable employment (Cooke and Speirs, 2005, Harrell et al., 2004). Military child-care centers are heavily subsidized; this, combined with quality and a location convenient to many families, translates into great demand and long waiting lists, particularly for infants (Zellman et al., 2009). In one 2004 survey of military parents, nearly 9 percent of par-

ents had an unmet child-care need, and 22 percent would prefer a different child-care arrangement than the one they had (Zellman et al., 2009).

The difficulty of finding suitable employment for civilian spouses of military personnel is often related to frequent relocations and being stationed in remote or international locations (Drummet et al., 2003). Military life not only may impede spouses' abilities to find employment, it can also result in lower wages, slower career progression, and underemployment relative to their professional training (Harrell et al., 2004; Hosek et al., 2002; Lim, Golinelli, and Cho, 2007; Lim and Schulker, 2010). Research has shown that military spouses experience lower wages not only as a result of frequent relocations but also because the pay is lower in labor markets surrounding military installations than the pay in other markets (Booth, 2003).

Frequent mandatory relocation is one of the most distinguishing aspects of the military family lifestyle. About one third of military members are relocated annually (Orthner, 2002). While many military families appreciate the change and enjoy living in different parts of the world, these frequent transitions may also be disruptive and can be stressful for service members, spouses, and children (Drummet et al., 2003; Vernberg, 1990). Regardless of the degree to which the military family has adapted to the stressors related to frequent relocation, it is not clear from the literature what specific services, programs, or policies would facilitate the relocation process for military families. One researcher speculated that in addition to support during the relocation process, military family members also need some degree of predictability when relocation involves disruptions in one's personal and professional life (Leyva, 2005), yet this speculation does little to indicate exactly what military families need in order to feel prepared for relocation, such as adequate preparation time for relocation.

The current operational tempo and deployment cycle often give rise to further demands, related problems, and additional associated needs. Given the relevance of these deployments, we next provide more detailed information about deployment-related issues.

Deployment-Related Issues

Predeployment

Deployment-related issues can arise as soon as the service member learns of the upcoming deployment. Before service members deploy, they may need to spend considerable time participating in additional training exercises and thus have less time with their family members (Segal and Segal, 1993; Hosek, Kavanagh, and Miller, 2006). Some deployment training takes place out at sea or at training centers, such as the National Training Center at Fort Irwin, California; the Joint Readiness Training Center at Fort Polk, Louisiana; and Yuma Proving Ground in Arizona. These training exercises can separate the service member from his or her family for long periods of time and may

last up to six months before the actual deployment. They can also impede the family's process of making preparations (such as arranging childcare, elder care) and financial arrangements (such as setting up power of attorney, preparing a budget), as well as anticipating and planning for problems that may arise during the service member's absence (Tomforde, 2006). Service members attempt to mentally and physically prepare for the challenges of the deployment while spouses and children mentally prepare for the absence of their partner or parent; this time period may be accompanied by apprehension and trepidation (Biehl et al., 2004). The first deployment can be especially difficult for service members and their families as they deal with separation anxiety and many unknown factors about the nature of the deployment and how the marriage or family unit will function with the partners so far apart, potentially for an extended period of time.

Predeployment stressors may also include uncertainty about the deployment date (Hosek, Kavanagh, and Miller, 2006). Sometimes service members are only given vague instructions to prepare for a deployment, or given a projected deployment window, but not a specific date. At times, deployment dates may change, even after service members have said goodbye to their family members and shown up to deploy. They can be sent home and have to undergo the same farewell process one or more times before their actual departure.

Deployment

Communication. The value of frequent communication between service members and their families during deployment has been documented (Hosek, Kavanagh, and Miller, 2006) and shown to alleviate negative stresses and the challenges of separation (Halverson et al., 1995). Service members who are worried about the well-being of their families cannot fully concentrate on the tasks required during the deployment (Tomforde, 2006). Studies have shown that Soldiers' motivation during missions is correlated with the well-being of their families (Biehl et al., 2004; Pittman, Kerpelman, and McFayden, 2004; Rosen and Durand, 1995).

Not all military members desire frequent communication with family members at home. Some found it exacerbated homesickness or distracted them from their mission, particularly when news from home was negative or unpleasant (Hosek, Kavanagh, and Miller, 2006). Other deployed service members have reported frustration when their spouse complains about problems that seem trivial compared to the problems encountered during deployment. Additionally, Britt and Bliese (2003) found that during times of high stress during deployment, those who were more engaged with their job experienced fewer of the negative effects of stress, possibly supporting the idea that service members need to be able to focus on their tasks during deployment.

Receiving appropriate information about the deployment is important for the management of stress and anxiety among family members. Media coverage contributes to separation difficulties as incomplete information and dwelling on negative aspects

of deployment incite panic and stress among service members and families (Drummet et al., 2003). News stories are constant reminders of the risks associated with deployment and often emphasize the negative aspects. Speculation and rumors about events that have occurred while the unit is deployed may also cause undue stress and anxiety among family members.

Marital Strain. Relationship maintenance is difficult during long separations and complicated by the stress placed on both the deployed service member and the spouse remaining at home. One study found that combat veterans have a higher divorce rate than noncombat veterans in all wars since World War II and that combat increases the hazard rate of marriage dissolution by 62 percent, a statistically significant impact (Ruger, Wilson, and Waddoups, 2002). Not all studies have come to this conclusion, however. One event history analysis of a sample of over 2,000 married males found that Vietnam-era military service, including service in Vietnam, did not result in higher rates of divorce (Cohen and Segal, 2009). About 55 percent of present day Soldiers are married compared to only 40 percent of Soldiers who served in Vietnam (Jaffe, 2005). Long, frequent deployments and separations place a strain on marriages, which has been demonstrated through several research efforts (Orthner and Rose, 2005; Raschmann, Patterson, and Schofield, 1989; Schumm, Bell, and Gade, 2000; Jensen et al., 1995; McCarroll et al., 2000; Karney and Crown, 2007).

Service Member Well-Being. The current conflicts in Iraq and Afghanistan are obviously dangerous and stressful, and repeated deployments take a toll on the physical and psychological health of service members (Tanielian and Jaycox, 2008). Combat exposure can result in physical wounds or even death, whether for the service member directly or to friends or other unit members. Recent research found deployment length was associated with increases in depression and post traumatic stress disorder scores (Adler et al., 2005).

Spouse Well-Being. During deployment, spouses may also face a great deal of stress. Lengthy, open-ended and unexpectedly extended overseas tours can be among the most stressful for families (Booth, Segal, and Bell, 2007). A recent study of Army spouses found that separation or deployment was more predictive of spouse's psychological and physical well-being than concerns about service member injury or death, frequent relocation, or foreign residence; the authors suggest that separation is the most important criterion for determining how spouses are affected by the military lifestyle (Burrell, Durand, and Fortado, 2003).

Early in the deployment, spouses must deal with the difficulty of separation and feelings of loneliness, abandonment, and helplessness (Tomforde, 2006), particularly at night when the spouse would normally be spending time with his or her partner (Jaffe, 2005). While service members are often relieved of routine tasks such as food preparation and laundry during the deployment, spouses' workloads often double without the help of the service member (Tomforde, 2006). During the separation, the remaining spouse must assume new roles and responsibilities and delegate new tasks to children.

Despite these difficulties, spouses of service members may attempt to mask the struggles associated with deployment in an attempt to prove their toughness and zero defect mentality (Martin, 2006).

Recent research has shown that spouses have mental health problems at rates similar to Soldiers (Eaton et al., 2008). During deployment, spouses may experience sadness, loneliness, anxiety, stress, or depression; however, it is unclear whether these effects are transitory or long-term. A 2008 review of this subject found the literature generally weak due to lack of an explanation about which aspects of deployment impact health, small sample sizes and cross-sectional study designs, lack of a control group, inadequate measures of health, and a focus on families of active-duty service members (Castaneda et al., 2008). Eaton and colleagues found that spouses with mental health needs most often sought services from primary care physicians rather than mental health professionals (Eaton et al., 2008).

Child Custody and Well-Being. When military members with children are scheduled to deploy, they must secure guardianship during their absence. This can be especially troubling for single parent families and dual-military parents who are deploying at the same time. Oftentimes children are sent to live with grandparents or other relatives, which poses its own strains (Drummet et al., 2003).

A focus group study sought to understand the adaptations made by adolescents during their parents' deployment in Operations Iraqi Freedom and Enduring Freedom (OIF/OEF) (Huebner and Mancini, 2005). Adolescents identified changes in the relationship with the deployed parent, increases in responsibility and demonstrations of maturity in caring for younger siblings and completing household chores, bonding with younger siblings, and changes in daily routine due to transportation or financial reasons. In another study, caregivers for children of a deployed parent reported levels of child emotional and behavioral problems higher than those reported in the general population of caregivers (Chandra et al., 2008).

Research prior to the current wars found that few studies addressed parent-child relationships during deployment and found that the nonuniformed parent had more difficulty interacting with his or her child during deployment (Bell et al., 1997). Some researchers have suggested an association between parental separation and military children's negative behavior, such as higher levels of aggressiveness and irritability or other disciplinary problems (Hillenbrand, 1976; Jensen and Shaw, 1996; Yeatman, 1981).

A comparison of adolescent dependents of military members who had deployed to Iraq during OIF in 2003 with adolescent dependents of civilians found that adolescent dependents of military members had significantly higher levels of perceived stress, systolic blood pressure, and heart rate than the civilian control group (Barnes, Davis, and Treiber, 2007). Psychosocial profiles of children aged 5–12 years during parental deployment revealed that 32 percent had Pediatric Symptom Checklist scores in the "high risk" category for psychosocial morbidity (about 2.5 times that of the national

norm); they also found that 56 percent of children had difficulty sleeping (Flake et al., 2009). Caregivers of children with a deployed parent reported higher levels of emotional or behavioral difficulties among those children compared to those in the general population; however, specific mental health needs of service members' children have yet to be identified (Chandra et al., 2008). Some researchers have suggested that the evidence of children's emotional and behavioral problems is less convincing than that of the spouse's, indicating a need for more research in this area.

Unfortunately, deployment-related stress occasionally manifests as child maltreatment (such as neglect or physical, sexual, or emotional abuse). A time-series analysis of Texas child maltreatment data was conducted to assess the rates of child maltreatment among military and nonmilitary populations before and during the military operations in the Middle East (Rentz et al., 2007). That study found that among nonmilitary families, the rate of child abuse was relatively stable between 2000 and 2003; however, among military families the rate of maltreatment increased at the end of 2002 and increased considerably at the beginning of 2003, during intense combat operations in the Middle East.

Children's Academic Performance. Recent research points to a negative impact of deployment on academic performance or little impact at all. An early post–Cold War study of children of fathers deployed for eight months or longer found that father absence was negatively correlated with academic performance, as indicated by scores on the Classroom Adjustment Rating Scale (Hiew, 1992). Another group of researchers found that daughters of deployed service members demonstrated a significant decrease in reading comprehension scores during Operation Desert Storm deployment; however, all other achievement test scores were not statistically different between children of deployed and nondeployed parents (Pisano, 1996). More recently, deployments to Iraq or Afghanistan were associated with decreases in test scores across most academic subjects; and there is evidence to support the idea that these effects may be long-term (Engel, Gallagher, and Lyle, 2010). Parental absences and household relocations have been associated with lower standardized test scores among children with active-duty deployed parents (Lyle, 2006). This effect was most evident among children with single parents, children with mothers in the Army, children whose parents had lower abilities (as indicated by Armed Forces Qualification Test scores), and younger children. A more recent study of children whose parents deployed with OIF found that 14 percent had problems related to school (lowered grades, lack of interest, etc.) (Flake et al., 2009). An investigation of Soldiers' deployment on children's academic performance found that children whose parents had been deployed 19 months or more since 2001 have modestly lower academic achievement scores compared with those whose parents deployed less or not at all (Richardson et al., 2011).

Clearly, there is a need for more comprehensive studies of educational outcomes among children of deployed parents. While the needs of these children and adolescents are unclear, one might expect that as a result of the service member's absence and

increased responsibilities among remaining parents and children, students may have less time and energy to devote to schoolwork. In the same manner, parents may have less time and energy to help their children with schoolwork.

Postdeployment Family Reunification

When service members return from deployment, problems that existed before and during deployment do not automatically disappear; in fact, new problems often arise (Hosek, Kavanagh, and Miller, 2006; Pincus et al., 2001; Tomforde, 2006). Upon return from deployments to Iraq and Afghanistan, one in five service members report having a mental health problem such as post traumatic stress disorder or depression, and approximately 320,000 have returned from these areas with possible traumatic brain injury (Tanielian and Jaycox, 2008). These conditions may have a profound impact on relationships among service members and their family members and may complicate the reintegration process (Drummet et al., 2003). Returning service members need adequate mental and physical health services to facilitate relief or recovery from psychological or cognitive injuries, and family members may also need mental health support during this difficult time (Wheeler and Bragin, 2007).

The transition from deployment to home life involves a great deal of change for the service member. During deployment, he or she became accustomed to the deployment lifestyle and his or her duties. Decisions may have held life-or-death consequences. Friends or fellow unit members may have been killed. The service member may have routinely carried a weapon and/or often been in a state of alert and readiness. The living conditions may have been austere or cramped, particularly for those living on ships or submarines. The environment may have included extreme temperatures and such dangers as mines, improvised explosive devices, mortar rounds, and anti-aircraft weapons. Nearly every day may have been consumed by work, and sleep deprivation may have been the norm.

When the service member returns from deployment, he or she must adjust to an often slower-paced lifestyle. The service member may experience agitation with seemingly mundane problems of family members, difficulty maintaining calm, and even a desire to return to the excitement associated with deployment (McNulty, 2003). Some veterans have indicated that they found it difficult to be in large crowds (large crowds could be very dangerous in Iraq); often had nightmares or flashbacks; were short-tempered or easily angered; and even acted out via aggressive driving, drinking, or fighting (Hosek, Kavanagh, and Miller, 2006). One study found that individual trauma symptoms (sleep problems, dissociation, and sexual problems) in Soldiers returning from Iraq or Afghanistan were negatively correlated with marital relationship satisfaction (Goff et al., 2007).

Married personnel, in particular, may have to adapt to changes that occurred in the family while they were deployed, such as shifts in family members' role, changes in power dynamics, and growth and development of their young children (Hosek,

Kavanagh, and Miller, 2006). Reintegration into the family's lifestyle may prove to be a challenge for service members who feel superfluous because they perceive their roles were adequately filled during their absence (Drummet et al., 2003). Some service members leave while their wives are pregnant, return home after the birth of a child, and must learn to adapt to the completely different lifestyle and responsibilities of parenting (Drummet et al., 2003). With time, the stress associated with adapting to these changes can be alleviated (Hosek, Kavanagh, and Miller 2006); yet, some researchers have found that after deployment, a minority of couples experience more severe marital problems (Jeffreys, 1999; McCarroll et al., 2000; McCarroll et al., 2003).

Adjusting to a partner's return after deployment can be a long process, lasting weeks or months. Spouses may feel either proud of their accomplishments and ability to run the home efficiently in the service member's absence or embarrassed that they were challenged or unable to handle the additional responsibilities (Drummet et al., 2003). Returning service members often expect to resume the role that the remaining spouse had assumed during the service member's absence, which may lead to tension and frustration (Drummet et al., 2003). Women in particular may find it difficult to give up the independence that they acquired during the service member's absence (Rohall, Segal, and Segal, 1999). Military personnel and spouses need to reevaluate boundaries, roles, and responsibilities upon the deployed spouse's return.

Children must also adjust to the return of the deployed parent, which may be a challenging process. Yeatman found that 38.1 percent of a subsample of families reported readjustment problems among children upon the father's return (Yeatman, 1981). Younger children, in particular, may experience feelings of unfamiliarity with the deployed parent, which can be stressful for both parent and child (Pincus et al., 2001; Tomforde, 2006). Older children may have difficulty reconnecting with the deployed parent and may need to reestablish a relationship with that parent (Pincus et al., 2001; Tomforde, 2006).

These overall themes—marital strain; spouse employment and education; spouse, child and service member well-being; deployment-related stressors; and more—are captured in the survey instrument that RAND developed. Any one of these themes could be covered more in depth within the existing framework, through simple modifications to the instrument to accommodate areas of interest while preserving the utility of the new methodology.

Ensuring That the Framework, Content, and Method Fits Today's Families: Focus Groups with Soldiers, Marines, Spouses, and Support Providers

Focus groups with military personnel, spouses, and support providers made several contributions to the development of this new approach. The purpose of these groups

was (1) to assess whether the framework we had developed made sense to military personnel and their spouses (e.g., did they understand the difference between problems and needs?) (2) to help determine what types of items should appear on the survey and what language should be used for them, and (3) to gain insights on how the survey should be administered. Researchers planning to adopt our research approach for other purposes or settings should similarly ground their survey content and administration modes by first conducting focus groups, town hall meetings, interviews, or other open-ended, interactive forms of inquiry.

The instrument was developed at a time of great change, when deployments to Iraq and Afghanistan were becoming commonplace and efforts to support service members and their families across the deployment cycle were growing. To be certain that our framework fit the particular circumstances of the wartime environment and that it would place the perspectives of military personnel and their families at the center of our inquiry, we traveled to one Marine base and one Army base for field research. Our focus groups included Soldiers, Marines, and spouses who were diverse by their rank and family situation. Our visits were timed to occur at about two months following a deployment so that we could ask participants to reflect upon their experiences across the deployment cycle. We also conducted focus groups with people who provide oversight or support to troops and their families. Those people could tell us about the populations they observed and about those who had come to them for help with their needs. This category of service providers includes Family Readiness Groups (Army) and Key Volunteer leaders (Marine Corps), mental health care providers, chaplains, and first sergeants. Figure 3.1 shows how we divided the focus group populations—in this case, at the Army base. The Marine base participants were similarly divided.

Figure 3.1
Focus Group Participant Structure (Army)

	Day 1		Day 2		Day 3		Day 4	
			Soldiers	Spouses	Soldiers	Spouses	Soldiers	Spouses
0930 to 1130	Providers Soldier-focused	Providers Family-focused	NCOs (E5–E6)	NCO (E5–E6) spouses	Junior enlisted (E1–E4)	Junior enlisted (E1–E4) spouses	Individual augmentee	Individual augmentee spouses
1200 to 1400	NCOs (E7–E8)	NCO (E7–E8) spouses	O1–O3	O1–O3 spouses	All rank dual-military troops	All rank single military parents	Outbrief commanders, interested parties	

NOTES: NCOs = Noncommissioned officers; O1–O3 = junior officers. Familiy-focused providers include members from the Family Readiness Group, Army Community Services, Youth Services, and Child Care Services. Soldier-focused providers include first sergeants, chaplains, and mental health care providers.

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Leaders and service providers who help military personnel and their families to prevent or manage their problems are privy to a wide range of problems and needs and are perhaps more aware than most of the range of resources available to address those needs. We scheduled separate focus groups for providers who support family members and for leaders and providers who primarily support military personnel, to ensure adequate attention to each of those populations.

We wanted all of the military members to feel comfortable speaking, so we clustered people according to their level in the organization to prevent rank from being an obstacle to participation. We separated military personnel from their spouses for the discussions because of the dramatic difference in the experiences of troops who go to war from the families who remain at home. Because we wanted the survey to capture the experiences of all types of military families, not just the traditional married military member with a civilian spouse, we requested one focus group with members of dual-military couples and one with single parents to help highlight the particular issues of those subpopulations.

Although most Marines and Soldiers deploy with their assigned units, some are deployed as individuals to units, often units from other bases that need more personnel with their particular skills. When troops join units from other locations, they and their families may not have access to deployment-cycle support services aimed at deployment-related challenges or sharing deployment information. To capture these perspectives, we requested separate focus groups with this subpopulation.[1]

To promote participation rates, we made reservations and paid for base childcare for the children of focus group participants, and we provided participants a barbeque lunch. The Marine base offered an additional incentive: Participating Marines could wear civilian clothes to the base, and they did not have to attend work for the entire day of their designated focus group.

Brainstorming Approach

To make the most of these focus groups, we approached them as partnerships with the participants. We were concerned about the potential limitations of asking people to air their private family problems in a setting tied to the service members' place of employment. We were also concerned about the limitations of visiting only one base in each Service when base characteristics such as size, frequency of deployments, or proximity to urban areas could heavily influence the experience of military families. To allow for a productive conversation among all focus group participants, we sought to limit the focus groups to an eight-person maximum, which places a limitation on the number of individual stories that could inform the research. The survey instrument, however, needed to be able to cast a wide net.

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[1] The Marine Corps referred to this population as "individual augments," while Soldiers used a similar term—"individual augmentees."

Our solution was to engage our participants as collaborators on this effort, and to ask them to draw upon all their knowledge and interactions with others, not just their own personal experiences and not just what had happened at their current base. After our study introduction, we placed a sheet of dry-erase static cling paper on the left side of the wall of the room and wrote "Problems" on the top of it. Then we asked participants to brainstorm about the type of problems that troops and their families face. Thus, we were not asking people to tell us their personal stories or the personal stories of those they knew, although sometimes those stories were volunteered as examples (Appendix B provides a complete set of focus group questions as well as the introduction we used). To help stimulate thinking, we probed during this discussion for problems that might arise before a deployment, during a deployment, and after a deployment, and we wrote their offerings up on the sheet on the wall. Once there was a sense that the list of problems had been exhausted, we placed another sheet of static cling paper we titled "Needs" right next to the Problems sheet. We clarified what we meant by needs by asking the group to tell us what troops and their families need to help them address those problems, and to explain which needs corresponded to each problem displayed. Posting their replies on the wall, rather than writing them in a notebook or typing them into a computer that only they could see, allowed them to scan for what had already been offered and think about what was missing or what would correspond. Again, we asked them to think about needs for each stage of a deployment.

After that list was completed, we posted another sheet to the right of the Needs sheet and continued to build the framework we had developed. We also continued to solicit input for each segment, revisiting the first sheets by prompting on whatever category was being discussed. Overall, the framework made sense to most participants, although service members were more likely to jump immediately from problems to solutions rather than to discuss needs. Because spouses did spend time focusing on the needs portion of the framework, and because we were able to solicit needs information from service members, we retained that segment of the framework. At the end of the day, those posted sheets came with us as our focus group notes and were used directly in the development of the survey instrument.

At the conclusion of the first focus groups we conducted, the participants raised some of their concerns with us about the research methodology and offered their own advice. The value of those discussions led us to solicit such input at the conclusion of each focus group: What methodology did the members advise?

Participant-Recommended Study Methods

In most of the focus groups with Soldiers and Marines, participants spontaneously asked us why we were preparing a survey instrument. There was strong agreement across participants, with no prompting from focus group facilitators, that the best way for military leadership and researchers to learn about the experiences and attitudes of military personnel and their families was through small discussion groups like the kind

we had just hosted. After we explained the desire to have an affordable and standardized method to routinely assess the perspectives of service members following a deployment, we received recommendations about how to do that.

Most focus group participants urged us to keep the survey short (10–15 minutes long), and to take into account the busy and diverse circumstances of the lives of military personnel and their spouses. An online option, we were told, allows people a chance to take the survey at their convenience, to manage noise and interruptions, and to participate without being overheard by co-workers or other household members. Most focus group participants believed that Internet access was widely available but recommended a telephone option for those who may not have access. We were urged, however, not to call people at home because they do not like to be disturbed by solicitations. Instead, we were advised to provide a number they could call if they were willing to participate to tell us when it was convenient for them to talk.

To maximize service member participation, we were advised to create opportunities during the workday. For example, Soldiers and Marines recommended that we coordinate with supervisors to secure permission for them to take time during the workday to take the survey online. It was also suggested that dedicated computers be set aside for this purpose for troops who do not work in an office environment with daily computer access. For a very large turnout, personnel recommended the familiar model of assembling units in auditoriums or gymnasiums to complete paper surveys, or distributing surveys during unit formations or meetings. Another recommended option tied to our original focus for a deployment cycle–focused survey was to make survey completion one of the postdeployment outprocessing stations.

Also, because of our original focus on the deployment cycle–related needs, we asked focus group participants about the appropriate timing within the cycle for a retrospective survey that would include the predeployment, deployment, and postdeployment phases. Ideally, a survey would be conducted across each of these phases, but we also wanted to be prepared if a research sponsor was willing to support only a single, postdeployment survey. The focus group participants generally recommended that we wait until all service members have returned from their postdeployment leave to administer the survey but cautioned that if we waited beyond 120 days, too many people will have left the base or will already be busy and refocused on moving into the training phase for their next deployment. The 90–120 day postdeployment window was commonly suggested as being far enough out that the survey could capture some postdeployment problems, not just those immediately prior to or during deployment. Naturally, a survey conducted beyond the postdeployment phase will lose some of its accuracy in capturing predeployment and deployment concerns because recollections can fade over time, or people may reevaluate their experiences in hindsight and increase or downplay the importance of particular events.

To reach spouses, Soldiers and Marines and service providers all told us not to rely on service members to notify their spouses about a survey: They are notoriously

unreliable about taking information home. Focus group participants also told us to expect that some spouses will never participate in a survey because they do not like the military—they neither want to help it out nor want any help from it.

Focus group participants also provided recommendations to promote survey participation overall (from both service members and spouses). Service members and spouses suggested that we provide survey incentives, such as a chance to win a prize or passes to the movie theater on post. Based on previous experiences of taking surveys and having no sense of any outcome, they encouraged us to clearly communicate how the survey data will be used, to convince them that participation is not another "waste of time."

We were also offered suggestions on the population that should be included in the survey. Some argued we should include single troops, because they have problems, too and do not necessarily receive as much support as the military provides to families. A repeated theme was that "families" include not just spouses and children but also parents, siblings, grandparents, and other kin. Some service members live in extended families and have responsibilities for other family members, and some were raised by relatives other than their parents. Other relatives may also want deployment-related information about their loved ones, may provide care for service members' children during deployments, or may help take care of the war wounded; thus, they should factor into a military family survey.

This feedback shaped the design of the test version of our survey: to aim for a survey 15 minutes long, to provide online and telephone options, to allow people to call in or schedule a call rather than initiate a phone interview, and to use multiple methods to inform military personnel and spouses about the survey. Some of the suggestions did not turn out to be practical for our test survey—for example, we did not have the resources to offer survey incentives. In addition, the hurdles to mailing a survey announcement to home addresses (rather than relying on service-member transmittal) or coordinating the survey with postdeployment outprocessing were considerable, especially because base cooperation for even lesser efforts was limited. In one case, we adapted the recommendation: Although a separate survey design and license would be required for a survey extending to other family members, we did ensure that the content of the survey captured issues related to those other family members (e.g., whether they faced the challenge of caring for other family members, and who cared for their children while they were deployed).

Conclusion

We began the development of the instrument with the design of an overarching framework that would structure the logic flow of the survey items. Meetings with subject matter experts and focus groups with service members, spouses, and service support

providers assessed the relevance of the framework to those audiences and collected suggestions on content and methods that would fit today's military population. Previous research also keyed us into significant issues that had been captured before and might still play a role today.

The next step was to design a survey that was structured to match the conceptual framework. We turn to this subject in Chapter Four.

CHAPTER FOUR

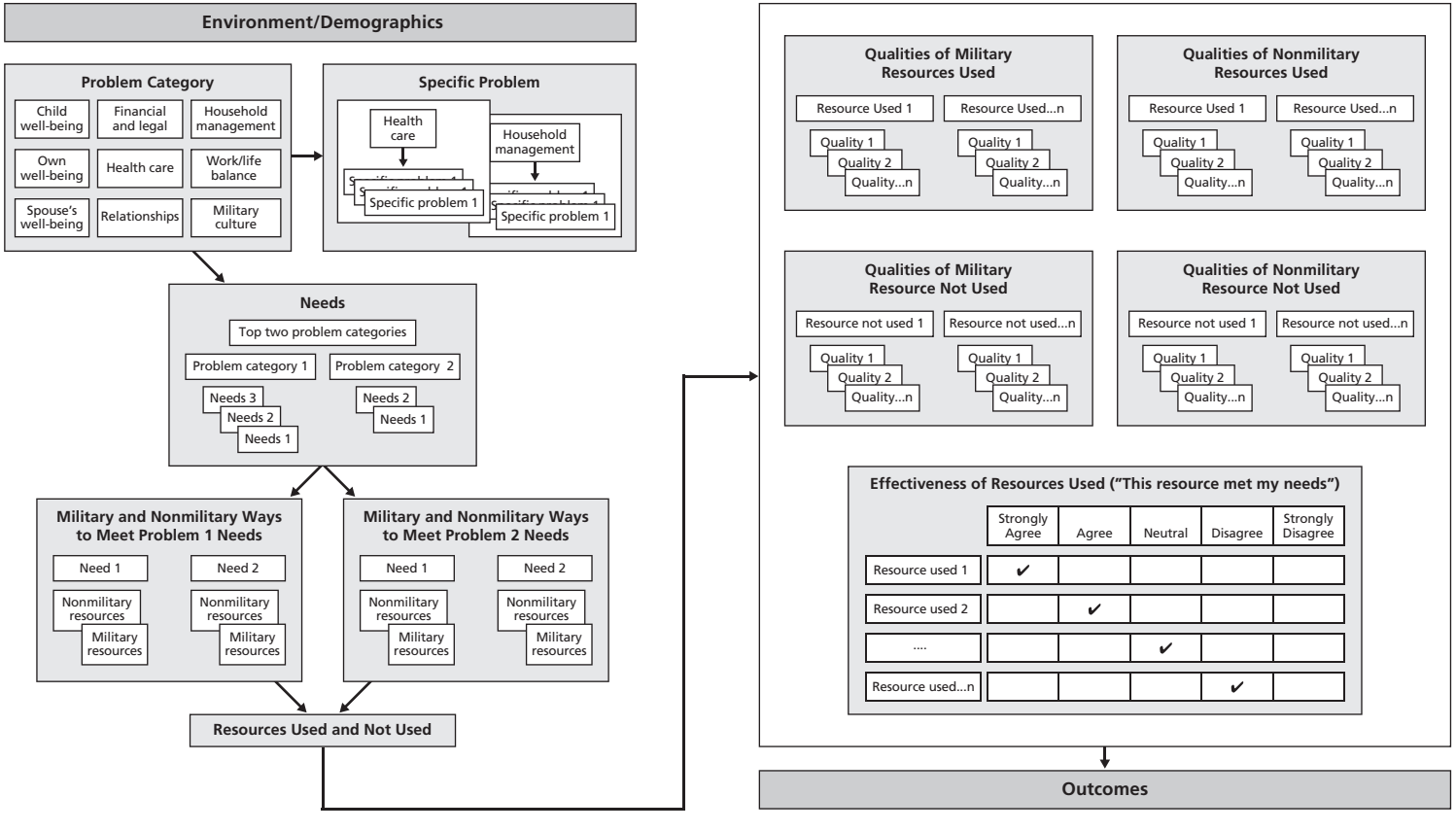
Developing the Service Member and Family Needs Survey Structure

The conceptual framework we developed (see Figure 2.1 in Chapter Two) called for an instrument that would do more than collect separate lists of problems, problem-related needs, options for support, and so on. Our framework requires a survey structure that follows the "story" of whether particular problems did or did not rise to the level of a need for assistance, then where the respondent turned, if anywhere, for help for those needs, then what made accessing sources of help more or less difficult, and finally whether the strategies used actually met the respondent's needs. This chapter describes the survey content that corresponds to the conceptual framework, section by section, and provides examples of how each section can build upon the previous ones.

The RAND needs survey was structured to follow the logic of that framework by using standardized lists to elicit a definitive set of problems, needs, available resources, resources used and not used, qualities of those resources, whether the resources used met the service member and family needs, and outcome data in the form of intention or support for remaining in the military. The final version of this instrument is provided in Appendix A. A computer program was written to facilitate branching and aggregating answers for recall and follow-up as the survey was being taken. The survey, as developed, can be administered by a proctor over the phone or can be self-administered over the Internet. The instrument was designed for a population that includes both single and married service members and spouses of service members.

In the upper left hand portion of Figure 4.1, we start with **Environment/Demographics**. This includes questions concerning marital status; Service; the status of the respondent's spouse; if married, the number of years the couple has been married; and if any dependents, the number and age of the dependents (additional demographics are also requested at the end of the survey). We asked the respondent to identify the base at which the military member is stationed so we could link the survey to the resources that were generally available at that base and its proximity to community resources (i.e., whether the base was near or far from a large metropolitan center).

Figure 4.1
Structure of the Service Member and Family Needs Survey



RAND *MG1124-4.1*

Problems in the Past Year

Next, we engage the respondent concerning the problems they or their family faces. We use specific problems in the **Problem Category** section, as well as an open-ended category that can be filled in by the respondent. The problem categories were selected based on a review of the literature and existing survey instruments; focus groups we conducted with service members, spouses, and service providers on several Army and Marine Corps bases; and interviews with experts in organizations such as Army Community Services, the National Military Family Association, and Military OneSource. We developed the following problem categories:

- Military Practices and Culture
- Health Care System Problems
- Work/Life Balance
- Relationship Problems
- Household Management
- Child Well-Being (shown only to respondents with minor children)
- Financial or Legal Problems
- Service Members' Well-Being
- Spouses' Well-Being (shown only to married service members and spouses).

The **Relationship Problems** items should be shown to all service members, so that married service members may respond regarding their spouse but single service members may report problems they experience with their committed relationship partners.

For each problem category, we asked the respondent to check off the kinds of problems they experienced. To prepare them for what was coming next, and to put the problem category and specific problems in context, we let them know that there would be follow-up questions about what assistance they needed to deal with these problems they were identifying, the ways they tried to solve the problems, and how satisfied they were with the kinds of assistance that was available to them. Specifically, to provide an example for some of the detail within each heading, for the problem category **Military Practices and Culture,** we asked whether they experienced any problems during the past year with the following:

- Understanding rights and resources for single members/military families
- Understanding military language, organization, culture
- Figuring out how to use the "system"—where to go, with whom to talk to get help or information
- Getting military people to listen to you, take you seriously, treat you with respect
- Rumors/gossip among military people
- Not being able to stay at/go to the military base you prefer
- Lack of/incorrect information about deployments

- Other problems dealing with military practices and culture. Please specify:_____.
- No, I did not experience any of the above problems.

Similar lists of specific problems were included for each of the problem categories. Although most problem items were the same for all respondents, some items were appropriate only for spouses or married service members, and thus were not displayed to single service members. In addition, at the end of the problem categories section of the survey, we included an open-ended problem category that allowed the respondent to briefly describe any other type of problem they experienced in the past year that had not been previously presented. At the very end of the survey they were given an opportunity to provide more detail about these issues, if they wished. Respondents were also permitted to move backward through the survey to change answers and progress through the survey based on those revised responses.

From this point forward, the survey was standardized around problem categories and specific problems. Taken together, there were 87 problem category/specific program combinations ranging from **Military Practices and Culture: Understanding rights and resources for single members/military families** to **Your Spouse's Well-Being: Victim of a crime**—far too many to follow up in detail in a single survey. Accordingly, we decided to focus the rest of the survey on the problem categories that the respondents had dealt with over the previous year and thought were the most significant. Because the survey was implemented as a computer program, we were able to provide the respondent with a summary of the problem category/specific program combinations they had selected and asked them to choose two problem categories from that list—two being a somewhat arbitrary cut-off aimed at keeping the survey length to about 20 minutes for most respondents. The selection of the top two problem categories also provided information about relative priorities: we learn which of the problem categories checked are most important. Prioritization of issues by service members and their spouses can help policymakers or program managers with scarce resources determine how best to allocate their resources or where to concentrate their outreach efforts.

Needs Linked to Greatest Problems

To follow up on the top two problem categories identified, we asked respondents to indicate, from a prepared list, the kinds of help they needed to address their problems. As with the problem lists, the needs list was developed from our review of the literature and preexisting surveys and from interviews and focus groups. This final list also reflects alterations made following our pilot test of the initial instrument. In the preceding problems section, the respondents might have selected **Health Care System**

Problems as one of the two problem categories that were most significant to them, with the specific problems of **Handling military health insurance claims** and **Managing pregnancy/childbirth**. The computer program reminds them of those choices and asks them to select related needs. The list of possible needs provided (the revised version is displayed here) is as follows:

- general information: for example, about rules or policies or about what is available and how to access it
- specific information: for example, about training or deployment schedules or how spouses can reach deployed troops
- an advocate: someone to try to get help for you
- advice or education: people with experience to recommend the best solution for someone in your situation
- emotional or social support
- professional counseling
- a helping hand: loans, donations, services to help out with some of your responsibilities
- activities: for fitness, recreation, stress relief, family bonding
- other needs that don't fit into the categories above:
  Please specify: _____.
- I had no need for assistance in this area.

This list of needs was uniform across all respondents: married and single service members and spouses. Because the potential number of needs for each of the two significant problem categories that the respondents selected are too numerous to follow up with individually (18 if all needs are checked for two problem categories), we again asked respondents to select for follow-up questioning two of the most significant needs for each of the two problem categories selected. The selection of two needs was arbitrary and the number can be increased with the only cost being the extra time it will take for a respondent to complete the survey and the cost of the additional data analyses. As with problem categories, asking service members and spouses to prioritize their needs provides additional information that can support decisions about where to focus assistance or education efforts. Again, because the survey was implemented as a computer program, we were able to provide the respondent with a summary of the problem category/needs combinations they had already selected and then ask which resources they had contacted to meet those needs. For example, if the respondent had indicated that in the Health Care System Problem category they had a great need for "***General Information: for example, about rules or policies, or about what's available and how to access it,***" we provided them with a list of people or resources they might have contacted to meet those needs, the option to write in resources not listed, as well as the option to indicate that they did not seek outside help for their need/problem.

This process was repeated up to a total of four times for each top two problems/needs combinations identified. For Service-specific options, the respondent was shown the appropriate resource based on the Service affiliation they had indicated at the beginning of the survey (e.g., a Marine would see the MCCS [Marine Corps Community Services] option at the same place in the survey where a Soldier would see the comparable FMWR). The list of possible resources on the revised survey is the following:

- Military contacts
  - Family Readiness Group/Key Volunteers/Key Spouses
  - Rear Detachment/unit members who did not deploy with the rest
  - Family and Morale, Welfare and Recreation (FMWR) Services/Marine Corps Community Services (MCCS)/Airman and Family Readiness Center (AFRC)/Navy Fleet and Family Support Center
  - Military OneSource (and show Service-specific option: Army OneSource, Air Force OneSource, Marine OneSource, Navy OneSource)
  - Unit member, troop leader, or chain of command
  - Chaplain
  - Military doctor or counselor
  - Relief/Aid Society
  - Other military contacts: Please specify: _____

- Nonmilitary contact
  - Government or community resources (for example, Temporary Assistance for Needy Families, WIC [Women, Infants, and Children], food stamps, the public library, Head Start, the YMCA, community center)
  - Private clubs, organizations, recreation or fitness centers
  - Religious or spiritual group or leader
  - Private doctor or counselor
  - Internet resources (such as WebMD, Google, Craigslist, Wikipedia, Yahoo.com)
  - Personal networks (friends, family)
  - Other nonmilitary contacts: Please specify: _____

- I didn't contact anyone for help with this need.

The military contacts list encompasses resources that could be available within a service member's unit (e.g., chain of command, chaplain), or at the installation (e.g., MCCS), or are Service or DoD resources (e.g., Relief/Aid Society, Military OneSource).

These lists could be expanded or contracted. For example, the military contacts section could specifically name more military programs, such as hotlines or programs focused on wounded warriors or child-related issues. They could also include more unit or installation-level programs. Following "Unit member, troop leader, or chain of command," another option could be added to capture "Other friend or acquaintance met through the military." Nonmilitary contacts could be expanded as well, to break out different government or community resources or to add other types of people, such as neighbors. Decisions about which items to include or how far to expand or collapse the categories should take into account the length of time needed to complete the survey, the amount of resources available to conduct data analyses, and the primary purpose for which the results will be used.

We did not limit resource options to military programs and service providers for a number of reasons. First, one of our goals is to understand whether the needs of service members and their families are being met. The danger of asking only about the use of military resources is that it is easy to jump to the conclusion that people are not doing anything to meet their needs and their needs are not being met, when, in fact, their needs may actually be met by other government, community, private, or personal resources. Second, we do not assume that military programs and providers are the best or only way to meet military personnel and family needs. In some cases, the best support the military can provide may be to assist people in connecting to existing civilian resources or interacting with their personal network of friends and relatives.

Characteristics of Military and Nonmilitary Resources Used and Not Used to Meet the Greatest Needs

After respondents had identified which resources they contacted to try to meet their specific needs, we solicited information about the characteristics that can act as obstacles and bridges to service members and their spouses turning to each of these resources, for resources they both used and did not use to fill the needs we followed up on.

Using the previous survey responses, the computer program created two sets of questions for the respondents. The first set asked about the quality of the military resources they did not contact; the second set asked about the quality of the military resources they did contact to meet their greatest needs for their greatest problems in the past year. On the next page is an example of a computer-generated table based on hypothetical responses about military services used and not used: Respondents were asked: "You indicated you did not use any of the following Military Resources for the particular needs you just described. However, we'd like to know whether any of the following statements apply to these resources. Please check any that apply."

Military resources not used	Have used them for other needs	Unaware of them/ difficult to find information about them	Convenient location/ easy to access	Might hurt my or my spouse's reputation to use them	Friendly/ welcoming/ reached out to me	Wait list/ response time too long	Referred/ good reputation
a. Family Readiness Group	1☐	2☐	3☐	4☐	5☐	6☐	7☐
b. Rear Detachment/ unit members who did not deploy with the rest	1☐	2☐	3☐	4☐	5☐	6☐	7☐
c. Family and Morale, Welfare and Recreation (FMWR)	1☐	2☐	3☐	4☐	5☐	6☐	7☐
d. Chaplain	1☐	2☐	3☐	4☐	5☐	6☐	7☐
e. Relief/Aid Society	1☐	2☐	3☐	4☐	5☐	6☐	7☐

Similar questions were then constructed for military resources used, nonmilitary resources used, and nonmilitary resources not used. This section thus provides information that can identify why people were not using certain resources (too far away, lack of awareness, stigma), and both positive and negative aspects about the services they did use (e.g., there may have been a long wait list, but it was convenient, had a good reputation, and not difficult to find information about). This format also enables the subsequent data analyses to sort out the reputation of resources by respondents who have never used particular resources compared to those who have had direct contact.

Because the types of barriers and bridges to using the resources on our list were not appropriate for the resource we called Personal Network, we asked respondents to "please check all of the following statements that apply to your Personal Network (friends and family)."

This question allowed us to "drill down" further to better understand why the respondent did or did not use the resource. These items also support investigation of the role of personal networks in the resiliency of military families.

1☐ I have friends or family members who make an effort to help me with my problems and needs.

2☐ People in my personal networks do not have the ability or resources to help me.

3☐ Most or all of my friends and family live too far away from me.

4☐ There is at least one person I can always count on to be there for me.

5☐ I do not have many close relationships.

6☐ I don't like to reveal my problems or needs to my friends and family.

7☐ People in my personal networks have a good understanding of what military life is like.

Ability of Resources to Meet Greatest Needs for Greatest Problems

Our final set of follow-up questions regarding respondents' top two needs, which stem from their top two problem categories, asks whether the contacts they made were actually able to meet their needs. A resource may be friendly and easy to access, but if it cannot help families meet their needs, either the resource must be modified in some way or military members and their families need to be better informed about the available resources that can meet those particular needs. Because of the survey's structure, we can better identify what those gaps might be: Perhaps a resource was effective at providing general information but was not able to provide the specific information the family member needed. Or perhaps it was able to meet the need for emotional and social support, but it did not provide the advice or education that was needed. The computer program allowed us to remind respondents which problem categories and needs they had selected for this follow-up question. The program also used prior responses to create a table listing the resources the respondents said they contacted for them to score on a standard five-point scale. On the next page is an example of how this summary and associated question might appear.

Projected Impact of Loss of Resources

DoD leaders must continuously make decisions about programming funding: what to introduce, continue, improve, expand, contract, or eliminate. Most of the newly developed instrument asked service members and spouses to convey information about their greatest problems and greatest needs. However, particular problems or needs may not rise to the level of greatest concerns precisely because of the availability of numerous resources provided by the military, so it would be erroneous to conclude that programs

Q. To review, you indicated that the most important problems and needs for you in the past year were:

Health Care System Problems

General information

An advocate

Problems with Your Own Well-Being

Emotional or social support

Professional counseling

Please tell us how well each of these contacts you made helped to meet your needs with:

Health Care System Problems

General information

	Very Well	Well	All Right	Not Very Well	Not at All
a. Military OneSource (Army OneSource)	1☐	2☐	3☐	4☐	5☐
b. Unit member, troop leader, or chain of command	1☐	2☐	3☐	4☐	5☐
c. Military doctor or counselor	1☐	2☐	3☐	4☐	5☐
d. Private clubs, recreation or fitness centers	1☐	2☐	3☐	4☐	5☐
e. Religious or spiritual group or leader	1☐	2☐	3☐	4☐	5☐
f. Personal networks	1☐	2☐	3☐	4☐	5☐
g. Comments:					

addressing problems or needs that are rarely selected in the survey should be eliminated. To provide one piece of information that could help leadership target programming or prioritize resources, we added a question asking service members and their spouses to gauge the potential impact if a military resource were no longer available to help them with their needs (see next page).

This item could be tailored to the leadership's interests to be more specific, such as listing elements of FMWR rather than FMWR as a whole or distinguishing different types of military doctors or counselors (e.g., Military Family Life Consultants, base mental health care providers, base physicians).

Q. What impact, if any, might there be if you were no longer able to access the following resources to help you address any problems you or your family might face?

If the following were no longer available to help you . . .	There would be little to no impact on me or my family	There would be some impact on me or my family	There would be a serious impact on me or my family	I don't know whether there would be any impact
a. (Show only Service/joint base-specific options): (Army/Navy) Family Readiness Group (USMC) Key Volunteers (AF) Key Spouse Volunteers	1☐	2☐	3☐	4☐
b. Rear Detachment/unit members who did not deploy with the rest	1☐	2☐	3☐	4☐
c. (Show only Service/joint base-specific options): Army Family and Morale, Welfare and Recreation (FMWR) Services Marine Corps Community Services (MCCS) Airman and Family Readiness Center (AFRC) Navy Fleet and Family Support Center	1☐	2☐	3☐	4☐
d. Military OneSource (and show Service/joint base-specific options): Army OneSource Air Force OneSource Marine OneSource Navy OneSource	1☐	2☐	3☐	4☐
e. Unit member, troop leader, or chain of command	1☐	2☐	3☐	4☐
f. Chaplain	1☐	2☐	3☐	4☐
g. Military doctor or counselor	1☐	2☐	3☐	4☐
h. Relief/Aid Society	1☐	2☐	3☐	4☐
i. Other military contacts (Please specify) _____	1☐	2☐	3☐	4☐
j. Comments:				

Outcome Indicators: Satisfaction and Desire to Remain in the Military

Finally, respondents were asked for some additional demographic information and about intentions to stay in the military. Service members were asked about their own

intentions, while spouses were asked about how they felt about their service member being in the military and about if they should stay or leave the military. In the revised version in Appendix A, married respondents are asked to report on the perceived intentions of their marital partners as well. The level of support was graded on a five-point scale ranging form ***"very supportive/strongly in favor of staying"*** to ***"very opposed/strongly in favor of leaving."*** If these survey data were linked to the identity of the respondents, these attitudes, as well as all of the survey categories (problems, needs, resources, barriers/bridges to using resources, ability of resources to meet needs, and demographics not captured in the personnel data files), could be linked to such outcomes as reenlistment rates, divorce rates, and performance measures (for example, promotion rates). As with all survey research, invitees need to be made aware of the terms of their participation (e.g., anonymous, confidential, identity not protected) prior to consenting to participate, and researchers will need to follow procedures for safeguarding data to be in compliance with federal laws for the protection of human research subjects.

To help ensure that the survey captured all of the issues surrounding needs that were important to service members and their spouses, respondents were then asked to provide additional comments about any problems or needs they experienced in the past year and their ability to meet needs with military or nonmilitary assistance. They were also given an opportunity to provide any other type of related comments they would like. A content analysis of the open-ended items in the survey will enable the survey to be adaptive as issues change. For example, a survey developed in 2007 might not have a specific reference to mortgage and home sale issues, but sufficient write-ins in a 2008–2009 administration of the survey would both help capture that information for analysis in that particular wave of the survey and suggest that the item be added to the financial problem category in the survey itself for at least as long as the issue is of prominence to this population.

Conclusion

The draft survey instrument was designed to reflect the conceptual framework. It captured traditional demographic items of interests, solicited information on the occurrence of a wide range of problems, the needs stemming from those problems, military and nonmilitary resources used and not used to meet those needs, the positive and negative qualities of those resources that could serve as barriers or bridges to use, whether resources actually met the needs, and overall service satisfaction and commitment items. In the next chapter, we describe how we pretested the survey instrument to see what we could learn about the instrument itself and about how to successfully administer such an instrument.

CHAPTER FIVE

Testing, Refining, and Assessing the Relative Value of a Prototype Instrument

This chapter provides more information about how we developed a survey instrument and recommended methodology based on the needs-centered research framework. We include this level of detail as documentation of the development process. The prototype of our survey was field-tested in the Spring and Summer of 2008 at an Army base and a Marine Corps base. (The revised version of the prototype that incorporated the changes we made as a result of the field test is presented in Appendix A.) In this chapter we discuss this field-testing process and what we learned from it. Additionally, we compare the relative value of this approach compared to other existing survey approaches.

Testing the Instrument with Soldiers, Marines, and Spouses

Gathering everything we had learned from previous research, subject matter experts, and our focus groups, we created a prototype of the survey instrument. We then tested the prototype with Army and Marine units

- to determine how long it would take the average person to complete the survey
- to refine the lists of problems, needs, and resources relevant for service members and their families
- to identify the most effective means for soliciting survey participation
- to gauge the degree of preference for an online versus call-in survey
- to document how often our respondents had been asked to participate in a survey; and
- to examine, demographically, who did and did not participate in this effort.

Working with our sponsor, RAND's Institution Review Board for Human Protection, and the Department of Defense licensing authority for surveys, we received a DoD Report Control Number in the fall of 2007. Working with the Army and Marine Corps, we considered a number of different schemes concerning how best to field test the prototype instrument. We selected two new bases for the field test

rather than returning to either of the bases where we had conducted the focus groups. We selected bases that had relatively large numbers of service men and women who recently returned from tours of duty in Iraq or Afghanistan. In total, we obtained 699 responses from eligible service members and their spouses that provided information we could use to assess the prototype instrument. As shown in Table 5.1, relatively few Soldiers participated, which we discuss in the next chapter on implementation, but we learned a great deal about our instrument, which is discussed in the next section.

Table 5.1
Number of Test Survey Participants, by Service and Marital Status

Service	No.
Army	
Single Soldier	3
Married Soldier	15
Army spouse	165
Marine Corps	
Single Marine	43
Married Marine	127
Marine Corps spouse	346
Other (not eligible)	60

What We Learned

The Average Length of Time to Complete the Survey Was Within Our Goals

In the pretest, the computer programmer embedded "time stamps" into the survey, which recorded the times at which people began the survey and progressed through its various stages. This feature allowed us to calculate the average time to complete the survey. With the assistance of the survey administration experts, we had estimated an average length of 25 minutes. This was longer than focus group participants had recommended, but we thought it could work if respondents felt the survey were engaging and relevant to their lives. During the pretest, the average respondent completed the survey in about 18 minutes.

The Problems and Needs Lists Needed Additional Development

Because the key aim of the survey is to identify the problems that service members and their families are facing and the resulting needs, it is important that the survey suc-

ceed in providing options that match service members' lives. We assessed whether the problems and needs listed on the survey were adequate for respondents by examining how many people checked the "other" option and wrote in something not listed on the survey. About 90 percent of spouses of Soldiers and about 95 percent of Marines and spouses of Marines found their problems already listed in the problem categories on the test version of the survey. A review of the problems respondents wrote in on the survey showed that some of the write-ins appeared in later survey pages. A higher percentage of write-ins were submitted in the needs category. The written content in the needs section suggested that some additional items should be included and that one item should be reworded to clarify what types of needs it encompassed.

Retaining the write-in option allows the survey to keep pace with changing types of personnel and family problems and needs: Not every write-in option must be coded, but commonly repeated written options could be clustered together for analysis, and an item capturing that option could be added to the next version of the survey.

We also examined whether some items were never or rarely chosen and thus might be subsumed under other categories or left to appear in the "other" option on future versions of the survey.

The Most Common Routes to the Survey Varied

By asking respondents how they heard about the survey, we learned about the effectiveness of various survey promotion efforts and potential biases in the respondent population. Among spouses of Army personnel, 67 percent reported learning about the survey through the Family Readiness Group, which was very active in promoting the effort, handing out our solicitation materials in all of the classes and meetings it sponsored while the survey was open, and sending out email announcements. Because these spouses are already networked with the FRG, they could be more aware of available resources and thus have fewer unmet needs than other spouses. On the other hand, they may have become involved with the FRG precisely because they have unmet needs and were looking for help through this group. The next-most-common ways that spouses learned about our survey (respondents were allowed to check as many sources as applied) were reflected in the 8 percent who reported they saw the link on the base website, 8 percent who saw the announcement in a newsletter, and 7 percent who heard about it from a unit leader. Other less-common options (selected by 5 percent or fewer) included emails, friends/family, flyer/poster, base TV, unit website, and base newspaper. Since few Soldiers took the survey, we do not know whether they were not aware of it, were aware but were dissuaded from participating, or just chose on their own not to participate.

The Marine Corps provided greater visibility on their websites, which they told us were commonly used by spouses. Indeed, 43 percent of the spouses of Marines learned of the survey from a base website. The Key Volunteers organization, the Marine counterpart to the Army's FRG, was the survey information source for 31 percent of our

pretest respondents. Other sources (email and websites) accounted for 11 percent of respondents, and we suspect some significant portion of those were due to a journalist's online and print story on Marine families that included a mention of this survey effort and a survey link. Following that story, we saw a jump in the number of survey responses. Five percent or fewer respondents cited other means of learning about the survey.

Half of Marines reported learning about the survey from a unit leader; 20 percent indicated other sources (mostly email), and 17 percent cited Key Volunteers. Less than 5 percent reported any other sources.

We placed thousands of colorful survey flyers in high-traffic areas around the base: gyms, childcare centers, bowling alleys, and movie theaters. Yet fewer than 4 percent of survey respondents reported these flyers as their survey information source. Ideally we would have mailed flyers, which were really half-page–sized postcards, to each home address to better reach spouses who might not be connected with any spouse support group or have much contact with the bases or military personnel. However, such an effort in our case would have required support from the bases to either provide the mailing addresses, which would involve privacy protection issues, or send out prepaid postcards on our behalf, which would require their labor. Because this was a field test, we did not pursue this option.

All Eligible Respondents Chose to Complete the Survey Online, Rather Than to Call In

All our survey promotion messages and materials provided service members and their spouses the choice of either going to a website to take the survey online or calling a toll-free number between 6 am and 9 pm any day of the week to take the survey by telephone. All respondents chose the Internet option. We had anticipated that at least some service members or spouses without Internet access would call, but none did.

Most Participants Reported No or Few Competing Requests for Research Participation

In our meetings with military leaders and subject matter experts, we frequently heard the perception that military personnel have "survey fatigue." Thus, one survey item asked, "Not including this study, how many military-related surveys or research focus groups have you been asked to participate in within the past year?" Table 5.2 shows that most spouse participants had not had any requests, although we do not know if this is a general trend in the population or whether those who had fewer requests were more likely to participate. Marines who participated had received more requests than the spouses, with a third of them reporting being invited to participate in three or more studies in the past year.

Table 5.2
Reported Number of Requests for Survey or Focus Group Participation in the Past Year (%)

Number of Requests	Spouses of Soldiers	Spouses of Marines	Marines
None	56	71	32
One	22	15	14
Two	13	8	21
Three	4	2	12
Four or more	4	3	21

Participants Likely Differ Demographically from the Population, but DoD Demographic Data on Spouses Are Limited

The demographics of our test population tell us something about who we were able to reach through our survey promotion efforts or about who was willing to participate in a survey. Many spouse demographics are not available in standard military personnel data files (e.g., age, education level, years married to service member, employment status, educational attainment, race or ethnicity) so it is difficult to gauge biases. Comparisons with spouse populations in other surveys may provide some context, although similar biases may be reflected there as well. It does appear that the spouse respondents in our survey were disproportionately female (100 percent of Soldiers' spouses, 97 percent of Marines' spouses), possibly older on average (about 30 years old for Soldiers' spouses, 28 for Marines' spouses), and married to their current spouse for longer than average (6 years for Soldiers' spouses, 5 for Marines'). Because the test version of the survey aimed for postdeployment service members, members of the very lowest ranks typical of those who just entered the military were underrepresented. Thus, the problems and associated needs of the youngest, newest members of the military may not yet be adequately represented in the existing survey items. Still, keeping new spouses in particular in mind, we minimized the use of military acronyms and jargon in the survey language and listed both pay grade designator and title (e.g., "E4 Senior Airman"). Also, since so few Soldiers participated, a future administration of this survey may reveal a higher number of write-in comments among this group. For this reason, and because we did not include personnel or spouses from the Air Force or Navy, we retained the write-in option in our revised survey instrument.

Revising the Instrument

Following the test version of this survey, we revised the web version to take into account the survey responses and written comments provided by respondents. The version in Appendix A reflects the revisions, and these changes have been programmed into the online tool as well. In addition to modifying individual items, we revised the survey language so that it could apply to an entire unit or base not merely those who deployed. Our contacts at the bases where we tested the survey and the military leaders we briefed asserted that while they want to understand the needs of those who deployed when thinking about Service, base programs, or initiatives or resources, they need to understand the entire population, not just a subset. We retained questions that would allow analyses to distinguish deployed populations from nondeployed, but instead of asking respondents about the last deployment cycle, the survey asks them about the previous year.

We also made modifications to the language to expand the scope to include Air Force and Navy active components. Although the Reserve forces face many of the same issues as their active component counterparts, the instrument would need additional modifications to include National Guard and Reserve resources, questions about problems and needs related to their civilian jobs, and questions particular to problems related to mobilization and demobilization.

Finally, a comparison exercise with other instruments led to the revision of a few more items and clarified the distinct contribution of this instrument compared with others.

Assessing the Contribution of the Sample Survey Instrument

When we briefed the Army Deputy Chief of Staff for Personnel on our methodology, he asked how the RAND Survey of Service Member and Family Needs (the RAND needs survey) compared with existing surveys and what, if anything might be gained from switching from one survey instrument to another. He had several well-being, quality of life, and family-related survey instruments and results available to him, including the DMDC Status of Forces surveys mentioned earlier in this paper, and he wondered if the many surveys could be consolidated into a single survey or whether some instruments could replace others. We quickly realized that direct comparisons of questions asked on each survey was not possible because the surveys were based on different paradigms and were designed to acquire different types of information. The paradigm for each of the major surveys is discussed below.

Survey Paradigm

The Army Leisure Needs Survey. The 2005 Army Leisure Needs Survey, administered to single and married Soldiers and their spouses, requests very detailed information about the leisure time preferences of respondents, and about use and satisfaction with a very extensive list of FMWR services. For the most part, it is not a needs assessment, although it does include some items on specific needs related to specific programs, such as which hours and days of the week respondents need hourly childcare. This extensive survey regarding recreational preferences and the use and satisfaction of FMWR programs could certainly help FMWR leaders make decisions about what kinds of activities they should offer, what hours they should keep their facilities open, and what prices they should charge; it could not be replaced by the RAND needs survey. Nor does the Leisure Needs survey capture other domains of the RAND needs survey.

The Survey of Army Families V. Another survey that the Army suggested might be compared with the RAND needs survey was the Survey of Army Families V, Fall 2004. This survey asked spouses direct questions about demographics, specific problems, and general satisfaction with specific programs, while the RAND needs survey, which also included demographics, asked single and married Soldiers and Soldiers' spouses about a range of problem categories and then delved in depth into the program categories that the respondents thought were most significant.

Comparing Surveys by Determining How Well They Describe a Hypothetical Family

Stepping back, we realized that the common feature of the RAND needs survey and the Survey of Army Families V was that they both attempted to capture aspects of the state of well-being of the respondents. So we attempted to more closely compare our survey with the Survey of Army Families V. An item-by-item comparison focused too much on individual topics and thus failed to capture the difference in utility of the instruments. We therefore decided to compare the surveys in terms of how well each was able to capture the story of the person taking the survey. We began by constructing a scenario for a hypothetical military family. We drafted a hypothetical family profile, based on what we know about families from our prior research, literature review, and focus groups. The profile included a description of the family, its well-being, the challenges it faces, and family members' use of and satisfaction with base and installation resources. We then filled out each survey based on the life circumstances described in the scenario. We wanted to know how well the surveys convey a family's primary issues: how much would we be able to glean based on survey responses?

We compared how well the RAND needs survey and the Survey of Army Families V captured the picture described in the scenario. After completing each survey for the hypothetical family, we returned to the scenario and color-coded the wording in it, using one color to highlight aspects covered by the RAND survey, another to high-

light aspects covered by the Army survey, and a third color to capture aspects covered by both surveys.

Our use of the scenario showed that the Survey of Army Families Version V was well suited for gaining detailed information about specific programs, such as base FMWR, which can be analyzed by demographic variables to identify populations that might be disproportionately dissatisfied or not utilizing available programs. The results can convey satisfaction with a range of Army services, use of those services, and frequency of use of any FMWR programs (all programs are grouped together). The survey also asks respondents why they participate in post recreation programs and services, offering 14 reasons and one open-ended option. Paired with demographic data, this information should help FMWR leaders identify dissatisfied populations, although we have no information about why people are or are not satisfied with the services and hence no understanding of what type of action, if any, should be taken. If families indicate that they do not use the Army services or recreation programs, the survey gives us no understanding of why. Did they have no need for the programs, were their needs met elsewhere, did they not know the program existed, or were there other reasons? Also, the value to policymakers of knowing the reasons people use the recreation programs appears to be limited. What would someone in charge of programs do with that information? Skip patterns in the survey instrument indicated that the Survey of Army Families Version V provides little information about problems the family is having unless the service member is deployed at the time of the survey. We can learn from spouses of deployed Soldiers how well they believe they are handling a range of issues, but we do not know if they have any needs related to the issues that they are handling poorly or what resources, if any, they have utilized to help them manage.

The RAND needs survey is not comprehensive, but it does focus on the trouble spots and seeks to understand the related needs and efforts to meet those needs. Like the Army's spouse survey, the RAND needs survey combines all FMWR under one general heading, but it does not specifically ask about use or satisfaction with the PX, commissary, gym, or other FMWR elements. For our hypothetical family, the RAND needs survey did not capture information linking FMWR services to problems or needs because they were not relevant to its greatest needs. The RAND needs survey provided information about whether the family had ever used FMWR programs for other needs and some information about barriers and bridges to use of the programs overall. It provides is an assessment of the range of problems the respondent is facing, the types of problems that are most prominent, and who the spouse has or has not yet contacted for assistance. To limit the amount of time for the typical respondent to take the survey, the RAND needs survey does not follow every reported problem through to the next level of needs, resources, and so on. The version of the survey that RAND tested asked respondents to choose their two most significant problems for further elaboration, but that number could be expanded to three or more if people were willing to spend a longer period of time completing the survey.

We concluded that rather than substituting for one another, the two surveys complemented one another. Each provided important information in its own domain. In fact, there was limited overlap between the two surveys.

The DMDC Survey of Active-Duty Spouses is an extensive survey given to a randomly selected group of spouses of active-duty military personnel. In 2006, the survey contained sections on each of the following: housing, permanent change of station moves, service member's military "tempo," deployments, effect of deployments on children, how well the respondent was prepared for the deployment, the respondent's feelings about military life, the marital relationship, the status of the children, childcare, schooling, spouse employment, financial well-being, health well-being, and programs and services.

Like the other two surveys, the DMDC survey does a more complete job of exploring in depth a limited number of select topics. For example, in the version of the survey that was given in 2006, the DMDC explored in depth issues concerning the respondent's employment situation, e.g., if the respondent was unemployed or employed working at least 35 hours per week, or underemployed. If the respondent was unemployed, the survey asked if the respondent had looked and for work in the previous month, and if not, why, providing a list of 16 reasons, ranging from "I do not want to work," to "I have transportation problems." On the RAND needs survey, among the problem categories were individual items about long or inconvenient work hours or difficulty finding suitable employment, and among the demographics is an item about number of hours worked. Otherwise, additional details about spouse employment are not pursued unless the related problems fall into the top two categories of most importance to the respondent. This part of the survey design is a judgment call designed to focus on the top priorities of respondents and to keep the survey length within a particular time frame. Respondents could instead be asked additional information about their top three problems, but asking about all problems would likely lead to prohibitive survey response times. It is also possible that in the RAND proposed design, spouse employment would be linked to other problems that a respondent could identify among the top two problems, such as financial problems or problems with childcare.

It was not clear to us what policymakers would do with some of the detailed information collected by DMDC. For example, regarding 13 specific types of programs, the survey asks: "Suppose that the quality and cost of on-base programs and services were the same as for off-base programs and services, which would you prefer?" Respondents are asked to indicate whether they prefer those services on or off base, with programs ranging from fitness centers, chaplain services, childcare services, commissary/grocery store, and more. We do not see the connection to policy or resource allocation or program management, although there may be some value to the questions that is not apparent to us.

A fully completed DMDC Active-Duty Spouse Survey would not provide a true picture of the most important problems the respondent might be facing, which was one goal of the RAND needs survey.[1] If, for example, the respondents were experiencing problems with their own well-being such as being lonely, depressed, and abusing alcohol, the RAND needs survey would allow them to select possible services they might "need" ranging from "general information" to "professional counseling." A range of both government-sponsored services and nonmilitary services would be examined, and respondents would indicate which ones they have used or not used, why, and the degree of satisfaction with the services used. There was no analogous set of questions in the DMDC Active-Duty Spouse Survey. The DMDC survey did ask them—on a five-point scale from very often to never—how often in the past month they felt things were out of control, etc., and if they had friends, relatives, or neighbors that they could talk with, borrow tools from, or who might help with chores, take care of the children for a break, or give a ride, etc. While there was a question that asked respondents to rate their current level of "stress," from much less to much more, nothing was asked about how the respondent tried to resolve the problems causing the stress, what services were used or not used and why, or how successful the respondent was in overcoming the stressor. Although a great deal of information was collected in this survey, its approach and the kinds of information it provides differ from the RAND needs survey.

Conclusion

A pretest of the survey instrument helped us to develop its content. We learned that the time it took the average person to complete the survey (18 minutes) was shorter than we had anticipated and within a desirable range. Thus, we knew we did not need to trim items and had room to add a few items without having to sacrifice others. Also, the problem lists were fairly complete: Approximately 90 percent of respondents or more found their problems within our lists and did not have to write in additional items. The list of needs required greater expansion, however, and some revision to the language to clarify what each item encompassed. Subsequent revisions are included in the survey in Appendix A.

The pretest also revealed some information about respondents. The most common ways people learned about the survey were through the volunteer spouse organization (Family Readiness Group for the Army and Key Volunteers for the Marine Corps), the base website, and a unit leader. We also saw a spike in participation following a journalist's online and print news story about the survey that appeared in a publication with primary circulation in the area that includes and surrounds a Marine Corps instal-

[1] Eric Wetzel of the Office of the Deputy Under Secretary of Defense for Military Community and Family Policy informed us in June 2011 that the content of DMDC surveys is based on the policy office's stated requirements and desires.

lation. Despite placing thousands of flyers across high-traffic areas on two bases, few respondents reported hearing about the survey from those flyers. We were surprised that 100 percent of eligible respondents chose to access the survey through the Internet rather than calling to participate by telephone. Also, at least among the spouses who chose to participate in the survey, the majority had not been invited in the prior year to participate in any surveys or focus groups. The Marines who responded, however, were more likely to have been asked to participate in one or more studies in the prior year. Finally, although very little demographic data on spouses are present in the military personnel files, we believe that our test version did not include a proportionate percentage of male civilian spouses of Soldiers or Marines or younger spouses. Also, few Soldiers participated and no service members or spouses from the Navy or Air Force were included, so we are less certain that their full range of problems and needs are captured on the proposed instrument, and thus we have retained the write-in options on the revised survey.

This new framework and corresponding tool proposed by RAND can provide a wealth of information on the full range of issues military personnel and their families face, including the problems they are confronting, the needs resulting from those problems, the resources that are and are not used, barrier and bridges to using resources, the effectiveness of those resources, populations in need of greater outreach, and links to attitudes toward military service. The instrument we developed draws upon previous research, subject matter experts, focus groups, a test version of the instrument, and a comparison with existing surveys. We made judgment calls on content based on the goal of creating a tool that is comprehensive yet averages less than 20 minutes for survey participants to complete.

The true value is the survey's cohesive survey design with sections building upon one another so that policymakers can directly link service member and family issues to the use of and satisfaction with unit, installation, Service, and DoD support programs. The content of the RAND needs survey is flexible: Response options could be expanded, contracted, or substituted with other content. The survey places the needs of service members and their families at the center, but it is not a comprehensive program evaluation tool. It does not ask detailed questions about individual program elements, nor does it ask about needs that are unrelated to significant problems that respondents are facing. Also, we caution against using the results to make decisions about funding cuts: It could be that an issue does not arise to the level of a top problem or produce a top need in our instrument because of the ability of existing resources to prevent problems. In such cases, if a program were cut, its absence might well create problems that did not previously exist.

In the next chapter, we discuss implementation challenges that this and other instruments may face.

CHAPTER SIX

Implementation Challenges

Constructing a survey instrument is only a starting point. For the tool to be effective, it must reach the intended population, solicit a sufficient level of participation, and provide results that can be acted upon. Furthermore, the results need to be provided to the organization's leadership at a level appropriate for the leaders' authority and sphere of influence. This chapter reviews some of the challenges to each of these objectives and makes recommendations for addressing them.

Challenges to Obtaining Adequate Survey Participation

Access

Researchers, even those sponsored by DoD entities, may face challenges in obtaining the cooperation of unit or base-level commanders for promotion or administration of the instrument in their domain. Leaders may feel bombarded with requests for focus group and survey research participation and thus may only be willing to accommodate research they have been formally tasked by senior leadership to support. Indeed, researchers may face active opposition to their efforts, with commanders instructing their personnel not to participate in a study. Researchers may also face competing demands for service member time—training, duty requirements, predeployment preparation, postdeployment outprocessing, professional military education, physical training, cross-country moves, or even family or vacation time. Thus, service members may not place priority on a request for their time that is not endorsed by senior leadership. Furthermore, service members have been cautioned about the dangers of responding to unknown email, mail, or telephone solicitations. Dangers include risk of identity theft, computer viruses or malware, or attempts by hostile forces to obtain information.

The endorsement of senior leaders can significantly aid the effort to conduct an effective survey. This point has been demonstrated in research we have conducted and was emphasized in feedback at the bases where we conducted the focus groups and the test version of the survey. Direct messages (e.g., in person, through emails) from unit or installation leaders can verify the legitimacy of the survey and imbue it with a sense of importance. Efforts to advertise the survey on base or ship may require approvals

from unit or installation leadership. Some researchers may need DoD sponsorship to obtain individual contact information for service members and spouses. Military sponsors can also facilitate survey administration through approvals for time away from the duty station for service members to participate in the survey, dedication of computers for survey participation during the survey period, or space in the units or other base facilities for researchers to administer the survey through portable electronic devices (e.g., laptop computers, personal data assistants).

Reaching Spouses

Reaching service members to invite them to participate in a survey is much easier than reaching spouses. Military personnel data files include phone numbers, email addresses, and mailing addresses for military members, and face-to-face contact is possible when they are at work. The information on file may not be entirely accurate, however, and may not be the same contact information needed for the spouse. For example, the phone number and email on file may be for the personal cell phone and email address of the service member but not the spouse. Also, the service member may be geographically separated from the spouse, so the home address may differ for the spouse. Or the spouse may have moved: Especially during deployments, some spouses move "back home" to save expenses and/or take advantage of help with childcare. Telephone information for spouses may also be inaccurate if service was disconnected due to unpaid bills or if spouses switch from landlines to cell phones or change cell phone providers and do not retain their previous phone number. In our focus groups and interviews, service members, spouses, unit leaders, and service support providers consistently asserted that service members were not reliable conveyors of information to their spouses and could not be counted on to take an announcement home to a spouse. With a smaller survey effort, the service member could be contacted and asked to provide the spouse information.

Family support organizations, such as Family Readiness Groups, Key Volunteers, and Key Spouse Volunteers, collect contact information on spouses, but not all service members or spouses are willing to share that information with those groups. These groups can be an important link to a particular set of spouses, but those spouses cannot be considered representative of the whole. Spouses not linked in with spouse support groups may have different and possibly greater needs than those who are. Leaders of the groups that we spoke with perceived that some of the spouses they encounter with the greatest need are those they had never heard from or did not know existed until they showed up on base homeless with their children in tow and their spouse deployed overseas.

Spouses without telephone or Internet access may face some of the greatest challenges meeting their needs but may also be the hardest to reach, not only for survey efforts but also by family support services. A multipronged approach to spreading the

word, including notices mailed to the homes of spouses, would be best at reaching a broad range of spouses.

One way to ensure that service members participate is to bring them together in a room during the duty day to take the survey. For the dynamic, online survey developed here, this would require electronic access, whether through an existing computer lab or a special set-up, as was done for the Post Deployment Health Reassessment (PDHRA), or an alternative, such as handing out personal digital assistants (PDAs) that could be used for taking this and other service surveys. Spouses cannot be required to assemble in this manner, but assemblies of spouses for other purposes (predeployment briefings, Soldier homecomings) or survey stations in areas they frequent (childcare centers, base stores, bowling alleys, movie theaters) may be targets of opportunity.

One final note: the best the military can hope to accomplish in a survey effort is to represent the experiences and attitudes of spouses who are willing to interact with members or affiliates of the military community. The goal is to ensure that as many spouses as possible are given the opportunity to participate.

Sampling Challenges

The sampling challenges are different for the population of civilians married to military members than they are for the military population, primarily because personnel data files contain limited information about civilian spouses. Thus, it is more difficult to determine how the survey sample compares to the population it is drawn from. For dual-military spouses, this task is easier because both will have personnel data files containing demographic information, such as age, race, and ethnicity, and at least some educational data (if imperfect).

For a simple study of the needs of all military personnel, a random sample of only a few hundred people will suffice, statistically, to represent the population as a whole. However, to ensure that the needs of a diverse range of personnel and families are being met, policymakers will want to ensure that enough families of each type of interest are included in the survey sample. For examples, leaders may want to compare the needs of enlisted personnel, NCOs, and junior and senior officers; those with different numbers and ages of children; single and married parents; those who live in the continental United States with those who live out of the country; or those who are dual-military couples with those who are mixed military/civilian. Whatever the population characteristics of interest to the research sponsor, we recommend that sample cell of interest be filled with 200 individuals, which would provide for sufficient statistical power ($p<.05$) to be able to detect differences between those groups that is statistically significant—and more likely practically significant—with a margin of at least 14 per-

centage points.[1] That means that, to show differences in the responses of officers and the responses of enlisted personnel, for example, the sample needs to include at least 200 officers and 200 enlisted personnel, with a total sample size of at least 400. To compare married officers, single officers, married enlisted members, and single enlisted members, each one of those categories must contain 200 respondents; thus, the overall desired sample size would be at least 800 respondents.

Some comparisons of interest may not be possible to select in advance because of personnel file data limitations. For military family needs, one might wish to sample by whether the civilian spouse of a military member works or attends school full-time, part-time, or not at all, or by how far away from base the family lives, but those data may not be available in advance.[2]

Sample size is also an issue for our survey because of the elaborate branching involved. With a small sample branching out to two top problems, then top two needs, and then resources used for those top two needs, the number of respondents in each response category can become too small to be meaningful. On a small scale (e.g., a company, a flight, a task element), the richness of the data produced by the branching would be lost. However, descriptive data on the types of problems experienced, types of needs that emerge, and resources used could still be captured, even though no longer linked or linked at the level of detail we propose. A survey that limited the number of problem options at the outset (in this case, for example, to just health care or child well-being), would prevent the branching from becoming too elaborate and thus would have the potential to take full advantage of the survey design with a smaller sample size.

One option is to attempt to sample everyone, which is the approach of the Air Force Climate Survey, which, with great effort, produces about a 50 percent response rate. This approach is certainly not affordable as a telephone option. As a web survey, the expense lies not in the collection of data, but in cleaning and analyzing a massive dataset.

Dissemination Challenges and the Air Force Climate Survey Model

One of the challenges of interpreting survey results for base or unit commanders is the lack of context in which to understand them. What leaders want to know is where they

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[1] We owe thanks to consultations with our colleagues Larry Hanser, Nelson Lim, Lou Mariano, and Al Robbert about the appropriate cell size.

[2] The home mailing address in service members' personnel files does not necessarily reflect the address of the spouse and/or children, for example when service members relocate for year-long assignments for professional military education without their families, when dual-military spouses are not assigned to the same location, and when spouses do not move with their service members so they can finish school or avoid untimely career disruptions.

are doing well and where the trouble spots are. Given that some degree of problems and dissatisfaction will always exist, how do leaders interpret the survey results for people in their charge? Routine and force-wide employment and analyses of the assessment will allow commanders to make better sense of the results—to understand how responses compare to those of previous years or to those in similar bases or commands. Longitudinal data for units or installations could also allow leaders to assess the impact of any new local efforts or policies, cuts or changes to programs, or changes in the base environment, such as deployment schedules, population expansion, or a transformation to joint basing.

We believe the Air Force Climate Survey, sponsored by the Chief of Staff of the Air Force, provides a useful model for collecting, analyzing, and distributing the results of a routine assessment that is useful down through multiple levels of the organization. The survey is administered via web-based survey during a two- or three-month period. All units throughout the Air Force make it well known that the responses are important in helping leadership at all levels understand the health of the unit and leadership in several research areas. Maximum participation is typically encouraged many times through local commander programs (emails, staff meetings, etc.) during the data-gathering phase.

Survey publicity conveys that responses are confidential and will not be attributable at the individual level. Each of these individual responses is aggregated to the first unit level (squadron) and unit commanders receive a detailed description of the unit's responses, but only at the unit level, not at the individual level. For instance, the unit commander might get a report that says 47 percent of the unit agrees that morale in the unit is high. The data are not described in sufficient demographic detail that individuals could be identified. One challenge though, particularly at the smallest levels, is ensuring that commanders of small units do not pressure their unit members for positive responses. This is best accomplished by both assurances and practices that demonstrate the tool is not used to evaluate leaders, but to inform them.

The data for each unit (squadron) are then aggregated at the next-highest administrative unit (group). The group commander has visibility of the aggregate data at the group only and is prohibited from seeing any of his squadron's data. This upward visibility is all that is allowed, so that group commanders can compare their group's information with the wing-level data for their particular wing, the base-wide data for the base where the group resides, the Major Command–wide data for the Major Command that owns the base, and the Air Force as a whole. This method of aggregation and upward visibility continues at all levels—for example, the wing can only see wing data and not the group-level data for the groups that report to the wing. The base commander is not allowed to see below the base-level data and can only see higher levels (i.e., Major Command and Air Force aggregated data). Headquarters, Command, Wing, and Center Staff agencies may not ask for a subordinate's report or any part of the report.

CHAPTER SEVEN

Potential Contributions of the New Methodology

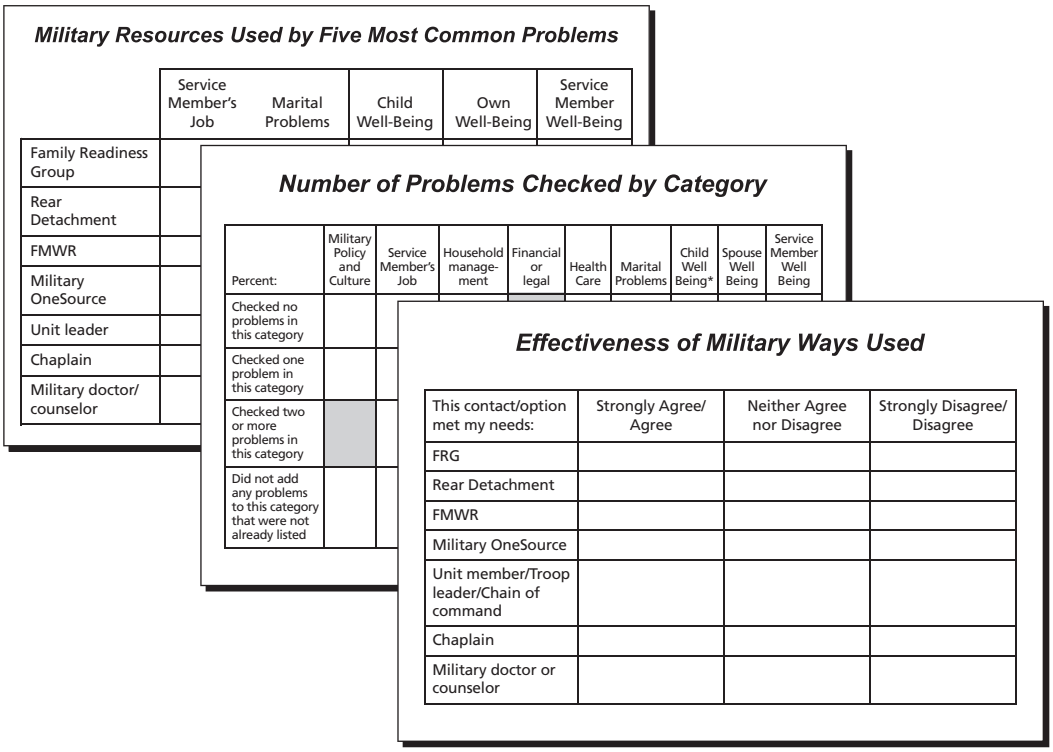
Information for Leaders and Decisionmakers

The survey instrument discussed here places the needs of service members and their spouses at the center of the inquiry. Rather than a patchwork of items that may or may not relate to one another, this instrument seeks to capture the range of problems that military personnel and their families may face. Then, for the most significant problem types, it delves into the subsequent needs and the types of resources used to meet the greatest needs—whether military or nonmilitary resources—and asks whether those resources were able to meet those needs. The survey data could be analyzed and applied in many ways, which would vary according to the audience, survey sponsors, and number of respondents. Since the survey results obtained in our field test are not representative of the force, they have not been included in this document. We did, however, prepare a number of reporting formats and showed them to senior personnel managers of the Army and Marine Corps. Figure 7.1 shows three of these formats.

As in any typical survey, each survey item has a corresponding variable that researchers analyze. So, for example, in this survey an analyst could report the number and percentage of spouses who indicated that in the past year they experienced trouble "getting access to military health care." That item falls under the Health Care System category (#16 on the survey). To assess the prevalence of health care system problems in general, analysts could report how many respondents checked any problems in this category or how many checked half the problems, or they could use some other standard. Analyses could also report, of those who indicated any Health Care System problems, what percentage said these problems were among their top two problems in the past year. Thus, the survey can capture the prevalence of specific problems, the prevalence of problem types, and the relative importance of a problem compared with all problems experienced in the past year from the perspective of the respondent. It can do the same with needs related to the top-priority problems.

This survey offers not only opportunities for revealing the prevalence of certain items but also the ability to link items across the survey not just by inference, but

Figure 7.1
Results Can Be Reported in a Variety of Ways



RAND *MG1124-7.1*

because the respondents reported that the items were linked. A separate variable is created for each priority problem and needs combination, e.g., one variable for respondents who indicated a health care system problem and a need for specific information; a separate variable for respondents who had a health care system problem and a need for an advocate to help them, and so on. The links continue to the resource section, so that we can analyze all the responses from people who had a health care system problem, a need for an advocate to help them, and who turned to a unit member, troop leader or the chain of command for help. We could see that particular population's assessment of positive and negative qualities of military and nonmilitary resources, and how commonly the unit member, troop leader, or chain of command was able to help those respondents meet their needs. We could also look demographically at just who the people are who are having health care system problems and are seeking advocates.

The framework calls for base and demographic data so that the results can be analyzed to identify locations or groups that are experiencing a higher-than-average level of difficulties or who are being underserved. Results should be shared only in a manner that will help with outreach efforts or resource allocation, however, never in a way to

promote stereotypes of particular populations or attempt to identify individuals. The sample survey we developed, given a sufficient respondent population, would allow analysts to home in on particular populations—for example, single service members, dual-military couples, married personnel, or spouses with small children, minority race personnel, noncommissioned officers, military women, families living in military housing, spouses who are employed, spouses who favor their service member leaving military service, and service members who have deployed in the past three years and/or their spouses.

The results of the survey can be disaggregated by unit level in the same way the results of the Air Force Climate Survey can be disaggregated to provide information that should be useful to a number of echelons of command, from unit commanders to the chiefs of staff of the Services, Service secretaries, and the Secretary of Defense.

Unit Commanders

Unit commanders are responsible for the health and welfare of the families under their command and could benefit from the additional insights this survey could provide. Because of concerns about stigma and career consequences, service members may not be forthcoming about the problems or needs they or their family members are experiencing. Spouses may have little to no contact with unit leaders or may not want to convey information they fear could jeopardize their spouse's career. A confidential or anonymous survey with a high participation rate could give commanders greater insight into the problems and needs of their families, enabling them to better address those issues.[1] For example, an analysis of common problems and needs may reveal that many of the families in a unit are coping with children who have emotional or behavioral problems, and most of those families report that they need professional counseling for their children or advice or education on how to handle the challenge. But analyses can also determine, for families with that particular problem-need combination, whether they are also facing obstacles to using resources and whether the resources they are using are meeting their needs. Thus, a commander has insights into personally sensitive issues not just across the entire Service but in his or her own unit. Commanders could respond to such results by inviting service providers who specialize in counseling for children or by educating parents about participating in a commander's call or a "lunch and learn" presentation. Or they could use special topic materials prepared by Military OneSource or base resources to help them prepare for group discussions or presentations. Commanders could also recommend a spouse support group and invite the providers to be guest speakers at their meetings. Commanders could also

[1] If the survey responses are anonymous rather than linked to individuals but are treated confidentially, then a survey question asking respondents to identify their unit would need to be added for the results to be useful to unit commanders. Those at the brigade level or higher would be more likely to be able to take full advantage of the branching of the survey, with enough responses in the response cells, although smaller units could still be provided useful information about nonlinked categories of problems, needs, and resources.

ensure that unit newsletters, websites, and bulletin boards integrate information about coping with child emotional and behavioral problems with available base and community resources that specialize in this issue, and about credible web resources, such as militaryonesource.com.

Service Providers

Analyses of data collected by this survey could also assist support service providers, such as chaplains, mental health care providers, and community services staff. The results could help them better understand and meet the needs of all military families, not just the needs of those who already come to them for assistance. Service providers could learn whether they are meeting the needs of those who turn to them for help with their most pressing problems. If the survey indicates they are not meeting everyone's needs or not meeting the most important needs, the providers could assess whether they are adequately prepared to meet the top needs related to the top problems. For example, an organization may do well at meeting families' need for information about navigating the military health care system but may not be meeting the need for advocates to help spouses navigate that system. The survey could also reveal whether there are negative perceptions about the support service providers or helping agencies (e.g., they are not perceived as friendly, welcoming, or reaching out to people) or negative attributes of their organization (e.g., not conveniently located) that they could better address through outreach efforts.

A snapshot of the greatest problems and needs at each base and in each unit could help incoming service providers orient themselves more quickly to the characteristics of their new clientele. Providers could then customize the services they offer (such as presentations, pamphlets, guest speakers, support groups) and further educate themselves about topics or needs that are priorities for the community but are not their personal strengths. Where greater expertise or resources in particular subjects are needed, service providers may need to identify additional community and online resources with whom they could coordinate and recommend to troops and families.

Installation service providers may be most aware of nonmilitary government and community resources available for service members and their families. If the survey results show few people turning to those government and community resources, even for problem-needs combinations for which there are numerous options, then service providers may want to incorporate information about those alternatives in their publicity about potential routes for problem-solving. The sample survey in Appendix A groups community or government resources together, but the survey could easily break out particular programs, such as food banks or food stamps, if the survey sponsor had particular interest in specific resources or specific types of problems or needs that are served by particular organizations.

Base Commanders

Base commanders oversee base services, and thus may be particularly interested in the survey data about the positive and negative characteristics of base resources and whether those services are meeting the top needs of service members and their families. Thus, reports of items on base resources broken out by problem-needs combinations could be useful for these leaders. If particular needs related to significant problems are not being met, base commanders could designate who will be responsible for filling the gaps. The effective solution might be to develop or promote capable military resources, but it might also be to engage and promote off-base resources. Base commanders could also direct base websites, newsletters, and television stations to address the population's need for greater information for their top problems through new stories and links to resources. If the survey were administered periodically, base commanders would be able to gauge whether their initiatives and those of their unit commanders and base commanders have been successful in addressing the needs, problems, and barriers to service that are prominent on their base. Annual or biennial reports noting how responses compare to previous responses would be valuable, although analysts should also consider whether shifting demographics, mission demands, external events (e.g., shifts in the economy), or other changes play a role in differing survey responses.

Military Departments and DoD

The Services and DoD could use the data to determine where additional funding, programs, or personnel need to be located. For example, if the data identify locations where service members or spouses report long wait times to use military resources, Service leaders could follow up with any locations not already known to have deficiencies to determine the cause for the delays. If many troops and their spouses report turning to Internet resources to meet their needs, the Services or DoD may want to develop an education or information campaign program to deploy across the population to help them discern credible from noncredible websites.

The data could also reveal whether certain populations are underserved: whether certain subgroups (e.g., single parents, dual-military couples, those frequently deployed, those who recently moved, Hispanic/Latino families) report a greater number of problems or needs or are more likely to indicate that the resources they contacted did not meet their most important needs for their most important problems. Patterns across the Service could warrant a larger-scale outreach, such as more-inclusive, targeted marketing or revision to resource offerings to ensure that the issues of those subgroups are adequately addressed (e.g., revision to professional military education and recruitment of mental health care providers who can conduct family and marital counseling sessions in Spanish).

The tool also provides opportunities to assess items against demographic and satisfaction items. If administered by researchers as a confidential survey where individual identities are recorded and protected, the responses of spouses could be linked to one

another and the data could also be linked to personnel records to track whether there is a relationship between survey responses and outcomes. Results on problems, needs, services used, and whether the resources contacted met top needs could be linked not only to one another but also to retention, readiness, or performance indicators. Ideally, the individual identities would be linked to the survey responses and protected as confidential. Alternatively, the survey data for a unit could be linked to unit performance (e.g., at the Combat Training Centers), reenlistment rates, and readiness levels. Or, for example, if a particular subgroup, such as Army captains, had lower continuation rates, the Services could explore whether they, as a class, had more problems, more needs, more negative perceptions of service providers or helping agencies, or more unmet needs than comparison groups. Identified gaps could lead to Service or DoD policy or program initiatives. Also, if this survey identified associations between the survey measures and these outcomes, the value of military resources devoted to meeting the needs of service members and their families can be quantified, not just assumed.

These are just some examples of how the data might be analyzed to support the authorities of different military professionals with the ability to change unit, installation, Service, or DoD programs, policies, practices, and resources to enhance the health and well-being of service members and their families.

Other Applications of the Framework

The survey's framework is its most significant contribution, and this methodology can be adapted for other purposes. For example, the framework could be used to assess the injury-related problems, needs, and resources used by wounded warriors. It could be used as we originally conceived of it: to assess deployment-cycle specific problems, needs, and resources. Sections could readily be expanded or contracted to reflect particular interests. For example, a study sponsored by a surgeon general might want to break out the need for professional counseling into different types of counseling needs, such as marital counseling, individual counseling, family counseling, group therapy, drug or alcohol rehabilitation, etc. Additional content could be integrated to include items particular to Guard and Reserve members, such as problems and needs related to mobilization, to their civilian employment, and to distance from the nearest military base. This framework could be used to structure qualitative research as well, as we did when initially testing it in focus groups.

The framework is also applicable beyond the realm of well-being. For example, one could design a survey for returning troops about their experience in combat operations and use that information to improve mission capabilities. The problem category would focus on operational problems (e.g., getting lost, roadside bombs, lack of electricity or plumbing, inability to understand the behavior of the local population), needs that result from those problems (e.g., equipment, intelligence, training, leader-

ship, language or cultural capability), resources used to meet those needs (chain of command, contractors, intelligence organizations, the Internet, human terrain team, NGOs) and the ability of those resources to meet those needs.

Conclusion

The research framework and method of application proposed here fills a gap not currently met by existing assessments in DoD. The proposed strategy places the perspectives and priorities of the population at the center of the inquiry. We recommend the execution of future research that assesses the self-reported problems and needs of the population of interest, and links those problems and needs to one another and to questions about programs. This approach provides greater context for understanding service member and spouse evaluations of military programs than frequency of use and general satisfaction ratings provide. The method proposed here assesses whether a perceived need for services exists in the first place and whether the needs of respondents who do not use military services are met satisfactorily elsewhere. We do not assume that military-funded programs must meet all of its population's needs; in some cases, community or private resources are acceptable or even preferable substitutes. By capturing the links between problems, needs, service utilization and satisfaction ratings, the approach we recommend can determine whether certain kinds of problem-needs combinations are associated with lower ratings, and thus provide information that can be used for program improvements. Our approach also includes soliciting information about barriers and bridges to accessing military and nonmilitary services, again to provide some guidance to military leaders and program managers on where improvements may be necessary. A survey employing the research framework could also explore whether participants with unmet needs, relative to those whose needs were met, are more likely to express satisfaction with military life and a desired to continue with it.

In this document, we have described how we developed a survey built upon the proposed research framework, but this survey is not the only possible application. First, the sample survey we developed could be tailored to match the interests and purview of various organizations concerned with the health and welfare of military personnel and their families. Additionally, existing service member and spouse surveys could be adapted to incorporate the framework—linking problems, needs, resources, barriers/bridges, and satisfaction.

APPENDIX A

Sample Survey of Service Member and Family Needs

In this appendix, we present a revised version of the RAND needs survey that reflects the survey framework proposed in this document. Its content was derived from the literature review, focus groups, open-ended questions on the test version of the survey, and comparisons with other surveys, and further refined during the publication review process. The individual survey items or topics do not constitute the new approach. What is new is the approach of centering the experiences on service members and their families and then tracing the connections between problems and associated needs to the resources that respondents contacted to meet those needs, to barriers and bridges to using government and private resources, and finally to whether respondents' needs were actually met.

This survey could be employed, with modifications to reflect the research sponsor and survey administration organization, terms of participation (e.g., anonymous, confidential), priorities of the research sponsor, and any significant new developments such as the creation of new service organizations designed to help service members and their families. Also, this survey was designed for large-scale administration (e.g., division, major command, Service): some of the category responses will likely need to be collapsed for smaller-scale efforts because too few respondents would fall into each of the categories (e.g., the age groupings for question 8, which asks about number of dependents in six age groups, or the service member's pay grade categories in question 37). This instrument is not proprietary to RAND: it may be adopted by other organizations and tailored to fit other purposes. Additionally, existing surveys could be adapted to employ the framework that links problems to needs to resources to whether needs are met and ultimately to Service satisfaction and commitment items.

Page 1. **Welcome to the Survey of Service Member and Family Needs**

[*Note: The top right-hand corner of each page displays a progress bar. The bottom left-hand corner provides buttons to allow the respondent to page backward or forward through the survey to review their previously selected responses. The bottom right-hand corner of each page states: "For technical assistance, please contact: Survey help." "Survey help" is a link to an email to the survey's technical support staff.]*

If you or your spouse is an Airman, Marine, Sailor, or Soldier who is 18 years or older, <Enter the Survey Here> (*move to page 2*)

If not, thank you for your interest. Please <Exit Here> *(move to exit message*)

(*Exit Message*) Thank you for your interest in the survey. This survey is designed for Airmen, Marines, Sailors, Soldiers and their spouses who are 18 years or older. Future versions of the survey may be adapted to address a wider population.

Below is contact information for Military OneSource, a free 24-hour service that is available 7 days a week to military personnel and their families.

Military OneSource Website: http://www.militaryonesource.com
Military OneSource Phone Numbers:

- Stateside: CONUS: 1-800-342-9647
- Overseas: OCONUS Universal Free Phone: 800-3429-6477
- Collect from Overseas: OCONUS Collect: 484-530-5908
- En Español llame al: 1-877-888-0727
- TTY/TDD: 1-800-346-9188

Page 2. **Service Member and Family Needs**

[*Insert survey license number and expiration date here*]

Privacy Advisory: Please note that this consent form provides information that describes why this information is being collected and how it will be used.

Purpose of the Survey

The Department of Defense wants to learn more about the needs of service members and their families and how well those needs are being met. The Office of the Secretary of Defense, with the support of the Services, has asked the RAND Corporation, a nonprofit research organization, to develop a survey that will provide DoD with up-to-date information on whether those needs are being met, which support services are working well, and which need improvement. Collection of this information is authorized by U.S.C. 10, section 1782, Survey of Military Families.

You, along with other service members and spouses, are being asked to take this survey. Your participation in the survey will help military families by informing installation commands about the strengths and weaknesses of its family support programs. This knowledge will guide future improvements to these programs.

Who Is Being Asked to Take the Survey

This survey is being offered to Airmen, Soldiers, Marines, Sailors and their spouses age 18 years and older.

What Survey Participation Involves

Participation involves completing this web-based survey, which should take less than 20 minutes to complete.

The survey will ask you about different kinds of problems you may have encountered in the past year, what kinds of assistance you may have needed to help you with those problems, and whether you were satisfied with the kinds of support available to you for those problems. In the last sections, we will ask some background questions and you will have the opportunity to comment on the survey itself or on family issues that the survey did not cover.

This information will be used to assist Department of Defense leaders in learning how well units and installations are meeting the needs of service members and military families. This information will also help leaders decide where they should focus family support efforts.

Confidentiality

We will treat your answers as strictly confidential. This survey is not designed to collect personally identifying information, but if it is provided *[phone version: I am not allowed to record it / Internet version: it will be deleted by the research team before they analyze the results].* Your responses will be combined with information from other survey respondents to

report the views and experiences of military members and their spouses. Only members of the research team will have access to individual responses.

Participation Is Entirely Voluntary

Your participation in this survey is voluntary. Your or your service member's command will not know whether you participated in this survey, nor will it know how you answered survey questions should you choose to participate. You may decide not to participate now or at any time. If you feel uncomfortable answering any of the questions, you may skip to the next question. You may stop taking the survey at any time without any negative consequences.

Whom to Contact

If you have any technical issues in taking this survey, please contact <Survey Help> (link to email address of tech support)
If you have any questions about the purpose or content of the survey, please send them to: study point of contact.
If you have any questions or concerns about your rights as a research subject, please contact: *[human subjects protection committee contact].*

Consent to participate (*respondents must click one to proceed*)

- ☐ I am under 18 years of age. (*move to exit message*)
- ☐ I am 18 years or older, and I have read this statement. I understand what it says and I agree to participate in this survey. (*move to page 3*)
- ☐ I am 18 years or older, but I do not want to participate in this survey. (*move to exit message*)

Page 3. **Study Information**

1. How did you hear about this survey?

   Check all that apply:

   1 ☐ Postcard in the mail
   2 ☐ Flyer/poster on base
   3 ☐ Email/announcement from unit leader
   4 ☐ Email/announcement from Family Readiness Group/Key Volunteers
   5 ☐ Friend/family/co-worker
   6 ☐ Unit newsletter
   7 ☐ Unit website
   8 ☐ Base newspaper
   9 ☐ Base website
   10 ☐ TV
   11 ☐ Other _____

2. Not including this study, how many military-related surveys or research focus groups have you been asked to participate in within the past year?

   (*Drop down box*)

0 ☐	None	6 ☐	6
1 ☐	1	7 ☐	7
2 ☐	2	8 ☐	8
3 ☐	3	9 ☐	9
4 ☐	4	10☐	10 or more
5 ☐	5		

Page 4. **Key Demographics**

3. Which best describes you?

Check one:
1 ☐ Unmarried service member
2 ☐ Married service member
3 ☐ Service member's civilian spouse
4 ☐ None of the above (*move to exit message*)

Please tell us about your military status so we can be aware of which policies and programs may apply to you.

4. a. (*Service member's version*) What is your Service?
b. (*Spouse's version*) What is your spouse's Service?

Check one:
1 ☐ Army
2 ☐ Navy
3 ☐ Air Force
4 ☐ Marines
5 ☐ None of the above (*move to exit message*)

5. a. (*Service member's version*) What is your current service status?
b. (*Spouse's version*) What is your service member's current service status?

Check all that apply:
1 ☐ Active duty
2 ☐ National Guard
3 ☐ Reserve

6. Which best describes your spouse? (*Show this option to married service members only*)

Check all that apply:
1 ☐ Never served in the military
2 ☐ Military veteran
3 ☐ Currently active duty military
4 ☐ Currently National Guard or Reserve

7. (*Show only to married respondents*) How many years have you been married to your current spouse?

☐☐ years (If less than 1 year, please enter 0)

8. How many dependents do you have in each age group? By dependents, we mean people who depend on you and/or your spouse for more than half of their financial support.

Age of Dependents	Number	Number Who Live with Me
a. Under 2 years		
b. 2–5 years		
c. 6–13 years		
d. 14–22 years		
e. 23–64 years		
f. 65 years or over		
g. ☐ I have no dependents		

9. (*Single service members, married service member*) Have you returned from a deployment within the past year?

Check one:
1 ☐ Yes
2 ☐ No

10. (*Dual-military and civilian spouses only, derived from questions 3 and 6 above*) Has your spouse returned from a deployment within the past year?

Check one:
1 ☐ Yes
2 ☐ No

11. At which military base are you or your spouse currently stationed?
(*Use drop down box listing locations and "other"*)

_____

Page 5. **Problems**

Life inevitably creates changes for service members and their families that can sometimes take the form of problems. Based on focus groups and prior surveys conducted with service members and spouses of service members, we developed a list of general categories of problems that may come up:

Military Practices and Culture
Work/Life Balance
Household Management
Financial or Legal Problems
Spouse's Well-Being
Health Care System Problems
Relationship problems
Child Well-Being
Service Members' Well-Being

We'd like to ask you to check off the kinds of problems you experienced. Then we will ask about what you needed to deal with these problems, the ways you tried to solve the problems, and your satisfaction with the kinds of assistance available to you.

Page 5.1. **Military Practices and Culture Problems**

12. Please check any problems you experienced with **Military Practices and Culture** during the past year:

1 ☐ Understanding rights and resources for single members/ military families
2 ☐ Understanding military language, organization, culture
3 ☐ Figuring out how to use the "system"—where to go, with whom to talk to get help or information
4 ☐ Getting military people to listen to you, take you seriously, treat you with respect
5 ☐ Rumors/gossip among military people
6 ☐ Not being able to stay at/go to the military base you prefer
7 ☐ Lack of/incorrect information about deployments
8 ☐ Other problems dealing with military practices and culture
Please specify: _____
9 ☐ I did not experience any of the above problems.

Page 5.2. **Work/Life Balance Problems**

13. (*Single service member version*) Please check any problems you experienced related to **Work/Life Balance** during the past year.
(*Married service member/spouse version*) Please check any problem you or your spouse experienced related to **Work/Life Balance** during the past year.

(*Do not show the underlined items about spouses to single service member*s.)

1 ☐ Finding time for physical exercise/healthy diet
2 ☐ Being able to pursue educational opportunities
3 ☐ Your spouse being able to pursue educational opportunities
4 ☐ Finding nearby or affordable options for recreation/stress relief/family time
5 ☐ Long work hours/inconvenient schedule for you
6 ☐ Long work hours/inconvenient schedule for your spouse
7 ☐ Not enough leave time for service members before or after a deployment
8 ☐ Other problem related to work/life balance
Please specify: _____
9 ☐ I did not experience any of the above problems.

Page 5.3. **Household Management Problems**

14. Please check any problems regarding **Household Management** you experienced in the past year:

1 ☐ Problems with moving/storage of belongings
2 ☐ Home theft/break-in/vandalism
3 ☐ Transportation problems
4 ☐ Problems with bills/checkbook management/budgeting
5 ☐ Time management (getting everything done in the amount of time you have)
6 ☐ Housework/yard work problems
7 ☐ Finding suitable housing
8 ☐ Home/car maintenance/repairs
9 ☐ Other household management problems
Please specify: _____
10 ☐ I did not experience any of the above problems.

Page 5.4. **Financial or Legal Problems**

15. Please check any **Financial or Legal** problems you experienced in the past year:

1 ☐ Pay issues (access to pay, errors)
2 ☐ Trouble paying debt or bills
3 ☐ Foreclosure on home
4 ☐ Bankruptcy
5 ☐ Power of attorney problems
6 ☐ Child custody/family legal problems
7 ☐ Filing for legal separation or divorce
8 ☐ Finding suitable employment for nonmilitary spouse (*Do not show this item to single service members or those whose spouses are active duty military.*)
9 ☐ Other financial or legal problems
Please specify: _____
10 ☐ I did not experience any of the above problems.

Page 5.5. **Health Care System Problems**

16. Please check any problems you experienced with the **Health Care System** in the past year:

(Do not show the underlined item about dependents to those without dependents.)

1 ☐ Getting access to military health care
2 ☐ Understanding military health benefits
3 ☐ Problems handling military health insurance claims
4 ☐ Managing dependents' health problems
5 ☐ Poor quality of military health care services
6 ☐ Managing pregnancy/childbirth
7 ☐ Managing health care needs of family members who are not military dependents
8 ☐ Other health care system problems
Please specify: _____
9 ☐ I did not experience any of the above problems.

Page 5.6. **Relationship Problems**

17. Please check any **Relationship Problems** you experienced with your spouse or partner in the past year:

1 ☐ Not enough contact with spouse/partner during a deployment
2 ☐ Problems communicating/expressing feelings
3 ☐ Growing apart/in different directions
4 ☐ Arguments
5 ☐ Physical or verbal abuse
6 ☐ Infidelity (cheating)
7 ☐ Divorce/Separation/End of relationship
8 ☐ Little or no physical affection
9 ☐ Changing roles/responsibilities in the family/marriage
10☐ Trouble reuniting/reconnecting after a deployment
11☐ Other marital/relationship problem
Please specify: _____
12☐ I did not experience any of the above problems.

Page 5.7. **Child Well-Being Problems**

18. (*Ask only of respondents who indicated on page 4 that they have dependents age 22 or younger*) Please check any **Child Well-Being** problems your child or children experienced in the past year:

1 ☐ Childcare problems (quality, distance, expense, waiting list, hours, etc.)
2 ☐ School problems (quality, distance, expense, access, etc.)
3 ☐ Child's poor or dropping grades
4 ☐ Emotional/behavior problems at school
5 ☐ Emotional/behavior problems at home
6 ☐ Child trouble bonding with parent
7 ☐ Child health and safety problems
8 ☐ Trouble adjusting after moving/relocation
9 ☐ Other child well-being problem
Please specify: _____
10☐ I did not experience any of the above problems.

Page 5.8. **Problems with Your Own Well-Being**

19. Please check any problems you experienced with **Your Own Well-Being** in the past year:

1 ☐ Feeling stressed/overwhelmed/tired
2 ☐ Loneliness/boredom
3 ☐ Mood changes: depression, impatience, anger, aggression, anxiety
4 ☐ Substance abuse (alcohol, smoking, drugs)
5 ☐ Grieving the loss of a friend or loved one
6 ☐ Physical injury/illness
7 ☐ Problems communicating with others
8 ☐ Trouble sleeping
9 ☐ Risk-taking (like reckless driving)
10 ☐ Out-of-control spending
11 ☐ Victim of a crime
12 ☐ Other well-being problems
Please specify: _____
13 ☐ I did not experience any of the above problems.

Page 5.9. **Problems with Your Spouse's Well-Being**

20. (*Ask of married respondents*) Please check any problems related to **Your Spouse's Well-Being** in the past year:

Did **YOUR SPOUSE** experience problems with:

1 ☐ Feeling stressed/overwhelmed/tired
2 ☐ Loneliness/boredom
3 ☐ Mood changes: depression, impatience, anger, aggression, anxiety
4 ☐ Substance abuse (alcohol, smoking, drugs)
5 ☐ Grieving the loss of a friend or loved one
6 ☐ Physical injury/illness
7 ☐ Problems communicating with others
8 ☐ Trouble sleeping
9 ☐ Risk-taking (like reckless driving)
10 ☐ Out-of-control spending
11 ☐ Victim of a crime
12 ☐ Other well-being problems
Please specify: _____
13 ☐ My spouse did not experience any of the above problems.

Page 5.10. **Other Problems**

21. Please briefly describe any other type of problem you experienced in the past year. You'll have a chance at the end of the survey to provide more detail about these issues, if you wish.

_____

_____

_____

(*If respondent reports no problems listed on pages 5.1–5.10, skip to background information on page 8.*)

Page 5.11. **Top Two Problems**

22. The following is a list of the types of problems you indicated you faced in the past year. Please pick which TWO you think were the most significant types of problems you've dealt with:

Sample list: (*actual list will depend on what people answered previously*)

1 ☐ **Household management**
Moving/storage of belongings
Finding suitable housing

2 ☐ **Health care system problems**
Handling military health insurance claims
Managing pregnancy/childbirth

3 ☐ **Relationship problems**
Arguments
Changing roles/responsibilities in the family/marriage
Problems communicating/expressing feelings

4 ☐ **Your own well-being**
Loneliness/boredom
Mood changes: depression, impatience, anger, aggression, anxiety
Substance abuse (alcohol, smoking, drugs)

If you're having trouble deciding on only two, please pick the two that you would like to address in the survey right now. There will be a place for additional comments at the end of the survey where you can describe other problems.

Page 6.1. **Problems linked to needs (#1)** (*If no problems were listed, respondents are taken to Page 8, Background Information*.)

You indicated you faced the following types of problems in the past year:

(*Computer will list the first of the top two options here: This is an example of what might be displayed. The screen will be repeated for the second problem category picked*.)

Health Care System Problems

Handling military health insurance claims
Managing pregnancy/childbirth

23. Which of the following kinds of help did you NEED to deal with them?

Please check all that apply:

1☐ General information: for example, about rules or policies, or about what's available and how to access it
2☐ Specific information: for example, about training or deployment schedules or how spouses can reach deployed troops
3☐ An advocate: someone to try to get help for you
4☐ Advice or education: people with experience to recommend the best solution for someone in your situation
5☐ Emotional or social support
6☐ Professional counseling
7☐ A helping hand: loans, donations, services to help out with some of your responsibilities
8☐ Activities: for fitness, recreation, stress relief, family bonding
9☐ Other needs that don't fit into the categories above.

Please specify: _____

10☐ I had no need for assistance in this area.

Page 6.2. **Problems Linked to Needs (#2).**

You indicated you faced the following types of problems in the past year:

(*Computer will list the second of the top two options here: This is an example of what might be displayed*.)

Y**our Own Well-Being**
Loneliness/boredom
Mood changes: depression, impatience, anger, aggression, anxiety
Substance abuse (alcohol, smoking, drugs)

24. Which of the following kinds of help did you NEED to deal with them?

1☐ General information: for example, about rules or policies, or about what's available and how to access it
2☐ Specific information: for example, about training or deployment schedules or how spouses can reach deployed troops
3☐ An advocate: someone to try to get help for you
4☐ Advice or education: people with experience to recommend the best solution for someone in your situation
5☐ Emotional or social support
6☐ Professional counseling
7☐ A helping hand: loans, donations, services to help out with some of your responsibilities
8☐ Activities: for fitness, recreation, stress relief, family bonding
9☐ Other needs that don't fit into the categories above:
Please specify: _____
10☐ I had no need for assistance in this area.

(*If respondents indicate they had no need for assistance for both problems, they are taken to Page 8, Background Information*.)

Page 6.3. **Needs**

25. If respondent selects two or fewer needs for both problems, skip this page. If respondent selects more than two for one problem, the item reads:

The following is a list of the types of needs you indicated that you had for dealing with one of your top two problems. Please pick which TWO you think were the most significant needs you had:

(*Sample*)

Health Care System Problems *(Pick two)*

- ☐ General information
- ☐ An advocate
- ☐ Emotional or social support

If you're having trouble deciding on only two, please pick the two that you would like to address in the survey right now. There will be a place for additional comments at the end of the survey where you can describe other needs.

If respondent selects more than two for both problems, item reads:

The following is a list of the types of needs you indicated that you had for dealing with your problems. For each problem category, please pick which TWO you think were the most significant needs you had:

Health Care System Problems (*Pick two*)

- ☐ General information
- ☐ An advocate
- ☐ Emotional or social support

Your Own Well-Being (*Pick two*)

- ☐ An advocate
- ☐ Emotional or social support
- ☐ Professional counseling
- ☐ Activities

If you're having trouble deciding on only two, please pick the two that you would like to address in the survey right now. There will be a place for additional comments at the end of the survey where you can describe other needs.

Page 7.1. **Ways of Meeting Needs** (*Display will depend on what people entered previously. Below is just an example.*)

26. For help with **Health Care System Problems**, you said that you needed the following:

General Information: for example, about rules or policies, or about what's available and how to access it.

Please check any of the following you contacted to try to meet this need.

Military Contacts

1☐ (*Show only Service/joint base specific options*) (*Army/Navy*) Family Readiness Group (*USMC*) Key Volunteers/ (AF) Key Spouse Volunteers
2☐ Rear detachment/unit members who did not deploy with the rest
3☐ (*Show only Service/joint base specific options*) Army Family and Morale, Welfare and Recreation (FMWR) Services; Marine Corps Community Services (MCCS); Airman and Family Readiness Center (AFRC); Navy Fleet and Family Support Center
4☐ Military OneSource (*show Service/joint base specific options*)
Army OneSource, Air Force OneSource, Marine OneSource, Navy OneSource
5☐ Unit member, troop leader, or chain of command
6☐ Chaplain or members of military religious or spiritual group
7☐ Military doctor or counselor
8☐ Relief/aid society
9☐ Other military contacts (Please specify) _____

Nonmilitary Contacts

1☐ Government or community resources (for example, Temporary Assistance for Needy Families, WIC, Food Stamps, Public Library, Head Start, the YMCA, community center)
2☐ Private clubs, organizations, recreation or fitness centers
3☐ Religious or spiritual group or leader
4☐ Private doctor or counselor
5☐ Internet resources (such as WebMD, Google, Craigslist, Wikipedia, yahoo.com)
6☐ Personal networks (friends, family)
7☐ Other nonmilitary contacts (Please specify) _____
8☐ I didn't contact anyone for help with this need.

27–29. The question above will be repeated up to a total of four questions for each top two problems/needs combinations identified.

Page 7.2. **Characteristics Related to Non-Use of Military Resources**

30. You indicated you did not use any of the following **Military Resources** for the particular needs you just described. However, we'd like to know whether any of the following statements apply to these resources.

Please check any that apply:

Military resources not used	**Have used them for other needs**	**Unaware of them/ difficult to find information about them**	**Convenient location/ easy to access**	**Might hurt my or my spouse's reputation to use them***	**Friendly/ welcoming/ reached out to me**	**Wait list/ response time too long**	**Referred/ good reputation**
a. Family Readiness Group	1☐	2☐	3☐	4☐	5☐	6☐	7☐
b. Rear Detachment/ unit members who did not deploy with the rest	1☐	2☐	3☐	4☐	5☐	6☐	7☐
c. Family and Morale, Welfare and Recreation (FMWR)	1☐	2☐	3☐	4☐	5☐	6☐	7☐
d. Chaplain	1☐	2☐	3☐	4☐	5☐	6☐	7☐
e. Relief/Aid Society	1☐	2☐	3☐	4☐	5☐	6☐	7☐

*Single service member version omits reference to spouse.

Page 7.3. **Characteristics Related to Use of Military Resources**

31. We'd like to know more about the following **Military Resources** you indicated that you did contact for the particular needs you described.

Please check all of the statements that apply to these resources.

Military resources used	Have used them for other needs	Unaware of them/ difficult to find information about them	Convenient location/ easy to access	Might hurt my or my spouse's reputation to use them*	Friendly/ welcoming/ reached out to me	Wait list/ response time too long	Referred/ good reputation
a. Military OneSource	1☐	2☐	3☐	4☐	5☐	6☐	7☐
b. Unit member, troop leader, or chain of command	1☐	2☐	3☐	4☐	5☐	6☐	7☐
c. Military doctor or counselor	1☐	2☐	3☐	4☐	5☐	6☐	7☐

*Single service member version omits referencee to spouse.

Page 7.4. **Characteristics Related to Non-Use of Nonmilitary Resources**

32. You indicated you did not use any of the following **Nonmilitary Resources** for the par ticular needs you described. However, we'd like to know whether any of the following statements apply to these resources.

Please check all of the statements that apply:

Nonmilitary resources used	**Have used them for other needs**	**Unaware of them/ difficult to find information about them**	**Convenient location/ easy to access**	**Might hurt my or my spouse's reputation to use them***	**Friendly/ welcoming/ reached out to me**	**Wait list/ response time too long**	**Referred/ good reputation**
a. Government or community resources (for example, Temporary Assistance for Needy Families, WIC, Food Stamps, Public Library, Head Start, the YMCA, community center)	1☐	2☐	3☐	4☐	5☐	6☐	7☐
b. Private doctor or counselor	1☐	2☐	3☐	4☐	5☐	6☐	7☐
c. Internet Resources (such as WebMD, Google, Craigslist, Wikipedia, Yahoo.com)	1☐	2☐	3☐	4☐	5☐	6☐	7☐

*Single service member version omits reference to spouse.

Page 7.5. **Characteristics Related to Use of Nonmilitary Resources**

33. We'd like to know more about the following **Nonmilitary Resources** you indicated that you did contact for the particular needs you described.

Please check all of the statements that apply:

Nonmilitary resources used	Have used them for other needs	Unaware of them/ difficult to find information about them	Convenient location/ easy to access	Might hurt my or my spouse's reputation to use them*	Friendly/ welcoming/ reached out to me	Wait list/ response time too long	Referred/ good reputation
a. Private clubs, organizations, recreation or fitness centers	1☐	2☐	3☐	4☐	5☐	6☐	7☐
b. Religious or spiritual group or leader	1☐	2☐	3☐	4☐	5☐	6☐	7☐
c. Internet resources (such as WebMD, Google, Craigslist, Wikipedia, Yahoo.com)	1☐	2☐	3☐	4☐	5☐	6☐	7☐

*Single service member version omits reference to spouse.

Page 7.6. **Characteristics Related to Use of Personal Networks**

34. We'd like to know more about your Personal Networks, which you indicated that you did contact for the particular needs you described earlier in the survey.

    Please check all of the statements that apply to your Personal Networks (friends and family):

    1☐ I have friends or family members who make an effort to help me with my problems and needs.
    2☐ People in my personal networks do not have the ability or resources to help me.
    3☐ Most or all of my friends and family live too far away from me.
    4☐ There is at least one person I can always count on to be there for me.
    5☐ I do not have many close relationships.
    6☐ I don't like to reveal my problems or needs to my friends and family.
    7☐ People in my personal networks have a good understanding of what military life is like

Page 7.7. **Satisfaction with Ways for Meeting Needs**

35. To review, you indicated that the most important problems and needs for you in the past year were:

(*Sample*)

Health Care System Problems
General information
An advocate

Your Own Well-Being
Emotional or social support
Professional counseling

Please tell us how well each of these contacts you made helped to meet your needs with:

Health Care System Problems
General information

	Very Well	Well	All Right	Not Very Well	Not at All
a. Military OneSource (Army OneSource)	1☐	2☐	3☐	4☐	5☐
b. Unit member, troop leader, or chain of command	1☐	2☐	3☐	4☐	5☐
c. Military doctor or counselor	1☐	2☐	3☐	4☐	5☐
d. Private clubs, recreation or fitness centers	1☐	2☐	3☐	4☐	5☐
e. Religious or spiritual group or leader	1☐	2☐	3☐	4☐	5☐
f. Personal networks	1☐	2☐	3☐	4☐	5☐
g. Comments:					

Note: This chart is repeated for Health Care System Problems/an advocate; Your Own Well-Being/Emotional or social support; and Your Own Well-Being/Professional Counseling.

36. What impact, if any, might there be if you were no longer able to access the following resources to help you address any problems you or your family might face?

If the following were no longer available to help you . . .	**There would be little to no impact on me or my family**	**There would be some impact on me or my family**	**There would be a serious impact on me or my family**	**I don't know whether there would be any impact**
a. (Show only Service/joint base-specific options): (Army/Navy) Family Readiness Group (USMC) Key Volunteers (AF) Key Spouse Volunteers	1☐	2☐	3☐	4☐
b. Rear Detachment/unit members who did not deploy with the rest	1☐	2☐	3☐	4☐
c. (Show only Service/joint base-specific options): Army Family and Morale, Welfare and Recreation (FMWR) Services Marine Corps Community Services (MCCS) Airman and Family Readiness Center (AFRC) Navy Fleet and Family Support Center	1☐	2☐	3☐	4☐
d. Military OneSource (and show Service/joint base-specific options): Army OneSource Air Force OneSource Marine OneSource Navy OneSource	1☐	2☐	3☐	4☐
e. Unit member, troop leader, or chain of Command	1☐	2☐	3☐	4☐
f. Chaplain	1☐	2☐	3☐	4☐
g. Military doctor or counselor	1☐	2☐	3☐	4☐
h. Relief/Aid Society	1☐	2☐	3☐	4☐
i. Other military contacts (Please specify) _____	1☐	2☐	3☐	4☐
j. Comments:				

Page 8. **Background Information**

Note: approximately 5 minutes left to complete the survey.

Please tell us more about you and your family.* This information will help us make sure we have surveys from many different types of people, and will help us understand the most important issues facing them. We are not asking for any identifying information. (Repeat this statement on the top of every background item screen.)

*Single member version: Please tell us more about yourself.

Military Experience

37. What is (your/your service member's) current paygrade?

For Army, show:

1☐	E1 Private	9 ☐	O1 Second Lieutenant
2☐	E2 Private	10☐	O2 First Lieutenant
3☐	E3 Private First Class	11☐	O3 Captain
4☐	E4 Specialist	12☐	O4 Major
5☐	E5 Sergeant	13☐	O5 Lieutenant Colonel
6☐	E6 Staff Sergeant	14☐	O6 or above, Colonels and Generals
7☐	E7–E9 All other sergeant ranks	15☐	Don't know *(show only to civilian spouses of Soldiers)*
8☐	Warrant Officer		

For Air Force, show:

16☐	E1 Airman Basic	23☐	O1 Second Lieutenant
17☐	E2 Airman	24☐	O2 First Lieutenant
18☐	E3 Airman First Class	25☐	O3 Captain
19☐	E4 Senior Airman	26☐	O4 Major
20☐	E5 Staff Sergeant	27☐	O5 Lieutenant Colonel
21☐	E6 Technical Sergeant	28☐	O6 or above, Colonels and Generals
22☐	E7–E9 All other sergeant ranks	29☐	Don't know (*show only to civilian spouses of airmen*)

For Marine Corps, show:

30☐ E1 Private
31☐ E2 Private First Class
32☐ E3 Lance Corporal
33☐ E4 Corporal
34☐ E5 Sergeant
35☐ E6 Staff Sergeant
36☐ E7–E9 All other sergeant ranks
37☐ Chief Warrant Officer
38☐ O1 Second Lieutenant
39☐ O2 First Lieutenant
40☐ O3 Captain
41☐ O4 Major
42☐ O5 Lieutenant Colonel
43☐ O6 or above, Colonels and Generals
44☐ Don't know (*show only to civilian spouses of Marines*)

For Navy, show:

45☐ E1 Seaman Recruit
46☐ E2 Seaman Apprentice
47☐ E3 Seaman
48☐ E4 Petty Officer Third Class
49☐ E5 Petty Officer Second Class
50☐ E6 Petty Officer First Class
51☐ E7–E9 All other petty officer ranks
52☐ Warrant Officer
53☐ O1 Ensign
54☐ O2 Lieutenant, Junior Grade
55☐ O3 Lieutenant
56☐ O4 Lieutenant Commander
57☐ O5 Commander
58☐ O6 or above, Captains and Admirals
59☐ Don't know *(show only to civilian spouses of Sailors)*

38. (*Service member version*) How many years of active duty service have you completed?
(*Spouse version*) How many years of active duty service has your spouse completed?
(*ask of all in the case of Guard/Reserve who have had some active duty service*)
☐☐ Years (*If less than 1 year, please enter 0*)
1☐ Don't know

39. Are you:
1☐ Male
2☐ Female

40. What age were you on your last birthday?
☐☐ Years

41. What is the highest degree or level of school that you have completed?

1☐ 12 years of school or less, no diploma
2☐ High school diploma or equivalent (such as GED)
3☐ Some college or trade school, but no degree
4☐ Associate degree (e.g., AA, AS) or trade school certificate (such as cosmetician)
5☐ Bachelor's degree or equivalent (e.g., BA, AB, BS, Nursing)
6☐ Graduate degree (e.g., MA/MS/Ph.D./MD/JD/DVM)

Deployment

42. (*Service member version*) In the past three years, about how many months have you been deployed?
(*Spouse version*) In the past three years, about how many months has your spouse been deployed?

☐☐ Months
1☐ Don't know

43. (*If Service member's spouse is also military*) In the past three years, about how many months has your spouse been deployed?

☐☐ Months
1☐Don't know

(*If service member returned from deployment in past year, ask the next three questions*)

44. (*Service member version*) How long did your most recent deployment last?
(*Spouse version*) How long did your Service member's most recent deployment last?

☐☐ Months

45. (*Service member version*) How long have you been home since the most recent deployment?
(*Spouse version*) How long has your Service member been home since the most recent deployment?

☐ Months (show only to married respondents)

46. (S*ervice member version*) Did your spouse attend any deployment-related briefings offered by the military?
(*Spouse version*) Did you attend any deployment-related briefings offered by the military?

	Yes	No	I don't know (*show service members only*)
a. Before this most recent deployment?	1☐	2☐	3☐
b. During this most recent deployment?	1☐	2☐	3☐
c. Since this most recent deployment?	1☐	2☐	3☐

47. Are you a citizen of the United States? (This information will be used only for research purposes, such as to determine what types of benefits you might have been eligible for in the past year).

1☐ Yes
2☐ No

48. Is English a second language for you?

1☐ Yes
2☐ No

49. Are you Spanish/Hispanic/Latino?

1☐ No, I am not Spanish/Hispanic/Latino
2☐ Yes, I am Mexican, Mexican-American, Chicano, Puerto Rican, Cuban, or other Spanish/Hispanic/Latino

50. What is your race? Check one or more races to indicate what you consider yourself to be:

1☐ White
2☐ Black or African American
3☐ American Indian or Alaska Native
4☐ Asian (e.g., Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese)
5☐ Native Hawaiian or other Pacific Islander (e.g., Samoan, Guamanian, or Chamorro)
6☐ Other (specify): _____

51. *Single service member version*: Did you have caregiver responsibilities for an elderly or disabled family member in the past year? By caregiving we mean doing things like shopping, home maintenance, transportation, checking on them by phone, handling finances, or arrangements for care.

Married service member / spouse version: Did you or your spouse have caregiver responsibilities for an elderly or disabled family member in the past year? By caregiving we mean doing things like shopping, home maintenance, transportation, checking on them by phone, handling finances, or arrangements for care.

1☐ Yes
2☐ No

52. (*If they indicated they have children on Page 4*): Do one or more of your children receive special education or early intervention services, or who are in the Exceptional Family Member Program (EMP)?

Check one:
1☐ Yes
2☐ No

53. (*If they have children and selected option 1 in the Deployment History section on page 4*) Did anyone take over formal custody or guardianship of your dependents during the last deployment cycle?

    1☐ Yes (go to next question)
    2☐ No (skip next question)

54. (*If Yes to preceding question*) Who took custody of one or more of your dependents during your last deployment?

    Check all that apply:
    1☐ Ex-spouse
    2☐ Girlfriend/boyfriend
    3☐ Parent
    4☐ Sibling
    5☐ Other relative
    6☐ Friend in the military
    7☐ Friend not in the military
    8☐ Other

    Please specify: _____

Employment/Education (ask only of spouses)

55. On average, how many hours a week do you spend working at a job or working at your own business?

    ☐☐Hours a week

56. On average, how many hours a week do you spend attending school or college?

    ☐☐Hours a week

Housing

57. Which of the following best describes where you live?
    - 1☐ Military housing on-base
    - 2☐ Military housing off-base
    - 3☐ Civilian housing that I own or pay mortgage on
    - 4☐ Civilian housing that I rent, off-base
    - 5☐ With friends or family

58. (*If they live in civilian housing*) How far away from the nearest military base do you live?
    - 1☐ Less than 30 minutes away
    - 2☐ More than 30 minutes to less than 1 hour
    - 3☐ 1 to 2 hours
    - 4☐ More than 2 hours away

59. Did you move from one base to another ("PCS") in the past year?

    Check one:
    - 1☐ Yes
    - 2☐ No

60. (*If married and returned from deployment in past year, ask*) Service member version: Did your spouse move away from the base and its local area during the last deployment cycle?
    Spouse version: Did you move away from base during the last deployment cycle?

    Check one:
    - 1☐ Yes (*move to next question*)
    - 2☐ No (*skip next question*)
    - 3☐ Not applicable: my spouse didn't live on base or in the local area around the base before the last deployment cycle (*skip next question*)

61. *Service member version*: Why did your spouse move away from the base and its local area during the last deployment cycle? Check all that apply.
Spouse version: Why did you move away from the base and its local area during the last deployment cycle? Check all that apply.

1☐ To save money
2☐ Best value for the money
3☐ Safety and security
4☐ Closer to work/education
5☐ Better schools
6☐ Fewer rules
7☐ Privacy
8☐ Wanted to live in a specific area or community
9☐ Military housing was unavailable
10☐ Civilian housing near the base was unavailable
11☐ Wanted civilian neighbors
12☐ Wanted to be closer to friends and family
13☐ Other (specify): _____

Page 9. **Attitudes Toward Military Service**

62. (*Ask only of spouses*) How do you feel about your service member being in the military?

Check one:

1☐ Very supportive
2☐ Fairly supportive
3☐ Mixed or neutral
4☐ Fairly opposed
5☐ Very opposed

63. (*Ask only of spouses*) Do you favor your service member staying or leaving the military?

Check one:

1☐ I strongly favor staying
2☐ I somewhat favor staying
3☐ I have no opinion one way or the other
4☐ I somewhat favor leaving
5☐ I strongly favor leaving
6☐ N/A service member retiring soon (if checked, skip 64)

64. (*Ask only of spouses*) Does your service member favor staying or leaving the military?

Check one:

1☐ Strongly favors staying
2☐ Somewhat favors staying
3☐ No opinion one way or the other
4☐ Somewhat favors leaving
5☐ Strongly favors leaving
6☐ I don't know how my service member feels

65. (*Ask only of service members*) How do you feel about staying in the military?

Check one:

1☐ I strongly favor staying
2☐ I somewhat favor staying
3☐ I have no opinion one way or the other
4☐ I somewhat favor leaving
5☐ I strongly favor leaving
6☐ N/A I will be retiring soon (if checked, skip 66)

66. (*Ask only of service members*) How does your spouse feel about your staying in the military?

Check one:

1☐ Strongly favors my staying
2☐ Somewhat favors my staying
3☐ Has no opinion one way or the other
4☐ Somewhat favors my leaving
5☐ Strongly favors my leaving
6☐ I don't know how my spouse feels

67. Thank you for taking the time to complete our survey. Please feel free to provide additional comments about any problems or needs you experienced in the past year or your ability to meet those needs with military or nonmilitary assistance. You may also provide any other type of related comments you would like.

COMMENTS

Thank you, once again, for taking the time to complete the survey. Your input will help us understand the needs military personnel and their families have and how we can support them. Below is contact information for Military OneSource, a free 24-hour service that is available 7 days a week to military personnel and their families.

Military OneSource

Whether it's help with childcare, personal finances, emotional support during deployments, relocation information, or resources needed for special circumstances, Military OneSource is there for military personnel and their families. . . . 24/7/365!

The service is available by phone, online and face-to-face through private counseling sessions in the local community. Highly qualified, master's prepared consultants provide the service. Personalized consultations on specific issues such as education, special needs, and finances are provided. Customized research detailing community resources and appropriate military referrals are offered. Clients can even get help with simultaneous language interpretation and document translation.

Our interactive Web site includes locators for education, childcare, and elder care, online articles, referrals to military and community resources, financial calculators, live online work-

shops called Webinars, and "Email a consultant." Additional resources include brief videos of consultants addressing common issues such as communicating as a couple, budgeting and managing anger.

Face-to-face counseling sessions focus on issues such as normal reactions to abnormal situations (e.g., combat), couples concerns, work/life balance, grief and loss, adjustment to deployment, stress management, and parenting. Persons seeking counseling will receive up to six counseling sessions per issue at no cost to them. To access a counselor in their local community, individuals may call a Military OneSource consultant directly. Service is available in CONUS as well as Hawaii, Alaska, U.S. Virgin Islands and Puerto Rico.

Military OneSource is provided by the Department of Defense at no cost to active duty, Guard and Reserve (regardless of activation status) and their families.

Military OneSource Website: http://www.militaryonesource.com

Military OneSource Phone Numbers:

- Stateside: CONUS: 1-800-342-9647
- Overseas: OCONUS Universal Free Phone: 800-3429-6477
- Collect from Overseas: OCONUS Collect: 484-530-5908
- En Español llame al: 1-877-888-0727
- TTY/TDD: 1-800-346-9188

APPENDIX B

Focus Group Protocols

This appendix contains the focus group protocols used for the development of the sample survey presented in Appendix A. Two slightly different protocols were used: one for service member and spouse focus groups, and one for focus groups with people who care for service members and their spouses, such as chaplains, mental health care providers, spouse support group leaders, and first sergeants. These protocols are provided as background information for the survey, but they also demonstrate how the proposed research framework can structure not only survey research but also qualitative interviews and focus groups as well. Additionally, these protocols could be adapted by other researchers and modified to focus on a particular subset of problems and needs or on other types of problems and needs. For example, the protocols could be modified to solicit information on what types of operational problems service members faced during their last deployment, what types of needs those problems produced, where service members turned for help and so on.

Protocol for Service Members and Spouses

Introduction, Consent Statement:

Hi, [Introduce self and note-taker], We're from the RAND Corporation, which is a non-profit research institution, and we're here as part of an effort to understand the needs of military families before, during, and after deployments. Is everyone here a [demographics desired for the focus group, e.g., Senior NCO, single parent]?

We're visiting two Army bases and one Marine base to ask Soldiers and Marines about their deployment-related needs, and how well those needs were and were not met for the latest deployment. We're talking to family and service members of different ranks, different family situations, and even some troops who didn't deploy but supported those who did. RAND will use the information you provide to develop and instrument—perhaps a survey—that the Services could use to regularly measure the needs of their families, how well they're doing in meeting those needs, and how they could do better.

Although we're taking notes, we're not writing down any names and we won't disclose any information that would identify you to anyone outside of the project—including your [spouse's] commanders. We will keep all information you give us confidential. However, if you tell us that someone is being abused, especially if a child or an elderly person is being abused, you should know that we may report it to the appropriate authorities. At the end of this session, we will pass out a list of base and local family support providers and their contact information for your reference. We will destroy the focus group notes at the end of the study.

Taking part in this focus group is voluntary—you don't have to answer any questions that you don't want to or discuss any topic that might make you uncomfortable. Let us know if you don't want to participate or you want to stop at any time. We do appreciate any insights you can provide us, and we would appreciate your respecting other participants' privacy by not revealing their names and comments to others.

We'd like to start by getting a sense of who's in the room—let's go around the room, and please tell us your first name, any children, whether you live on or off base and [for troops: whether or not you/your spouse works outside the home, for spouses: your spouse's number of years of service].

Context

As I mentioned, we are interested in learning how to better support troops and their families before, during and after deployment. So let's start when someone first learns of deployment. What is it like when families first learn about an upcoming deployment?

Problems

Sometimes big changes, like a deployment, can create problems for families. Can you tell me about some of the problems troops and families experience as a result of deployment? Let's start by making a list of all the problems troops and families can experience. (*Probe for pre-, post-, and during deployment.*) (*Create list on whiteboard.*)

Which of these listed problems would you say tend to be more common? (*Probe for pre-, post-, and during deployment.*)

Can you tell me which of these seem to be more worrisome to troops and families? (*Probe for pre-, post-, and during deployment.*)

Needs

Now I would like to talk about the kinds of help troops and families need to address these problems. What are some of the needs troops and families may have when experiencing the problems we have listed? (*Probe for pre-, post-, and during deployment.*)

Can you tell me which of these needs correspond to the listed problems?

Solutions

Now I would like to talk about some options troops and families have for meeting these needs. Can you tell me the kinds of options troops and families have for dealing with these needs? (*Probe for on- and off-base programs as well as individuals.*)

Which of these services or individuals are best suited for the needs we have listed? (*Make correspondences on whiteboard.*) Which of these services or individuals are not available on- or off-base? Which of these needs don't have any solutions?

Can you tell me who would use these services or go to the individuals listed? Can you tell me who would not use these services or to go the individuals listed?

Barriers and Bridges

Let's talk about why someone would or would not use the services or go to the individuals we've listed. Why would someone not use the services or go to an individual?

Can you tell me what would make it harder for someone to use the service or go to a given person? (*Probe for on- and off-base programs as well as individuals.*)

Can you tell me what would make it easier for someone to make use of a service or to go to someone? (*Probe for all options on- and off-base—programs and individuals.*)

Needs Met

Now that we have gone through a list of potential problems, possible needs and solutions, and who uses the services and individuals available, I want talk about what can be done to better support troops and their families.

What would you change to improve military families' ability to meet their deployment-related needs? (*Probe for on- and off-base programs as well as individuals.*)

If you were given a limited number of resources, where would you devote them and why? (*Probe for all on- and off-base.*)

Outcomes

Do you think the needs that we've discussed today affect a troop's work performance? If so, how? If not, why not?

Do you think that these needs can affect a troop's decision to re-enlist? Why or why not?

Concluding Remarks

Thank you so much for your time and for sharing insights from your experiences. Your contribution will help us and ultimately the Services to better understand some of the changes that troops and families experience as a result of deployment. Before we go, are there any questions you have of us, or any last comments you would like to make?

As we mentioned earlier, we have a list of base and local family support providers and contact information to pass out to you. Our contact information is on there as well in case you have any questions about the study later on.

Thank you.

Protocol for Service Providers

Introduction, Consent Statement:

Hi, [Introduce self and note-taker], We're from the RAND Corporation, which is a non-profit research institution, and we're here as part of an effort to understand the needs of military families before, during, and after deployments. Is everyone here a [demographics desired for the focus group, e.g., Senior NCO, single parent, etc.]?

We're visiting two Army bases and one Marine base to ask Soldiers and Marines about their deployment-related needs and how well those needs were and were not met for the latest deployment. We're talking to family and service members of different ranks, different family situations, and even some troops who didn't deploy but supported those who did.

We wanted to talk to you at the beginning of the week, before we talk to troops and spouses, to gain some insights from people who provide support to troops and their families before, during, and/or after deployments.

RAND will use the information you provide to develop an instrument—perhaps a survey—that the Services could use to regularly measure the needs of their families, how well they're doing in meeting those needs, and how they could do better.

Although we're taking notes, we're not writing down any names and we won't disclose any information that would identify you to anyone outside of the project—including commanders. We will keep all information you give us confidential. However, if you tell us that someone is being abused, especially if a child or an elderly person is being abused, you should know that we may report it to the appropriate authorities. We will destroy the focus group notes at the end of the study.

Taking part in this focus group is voluntary—you don't have to answer any questions that you don't want to or discuss any topic that might make you uncomfortable. Let us know if you don't want to participate or you want to stop at any time. We do appreciate any insights you can provide us, and we would appreciate your respecting other participants' privacy by not revealing their names and comments to others.

We'd like to start by getting a sense of who's in the room—let's go around the room, and please tell us your first name, which support program or services you represent and the number of years you have been working with troops and their families.

Context

As I mentioned, we are interested in learning how to better support troops and their families before, during, and after deployment. So let's start when someone first learns of deployment. In your experience, how does the initial announcement of an upcoming deployment affect families?

Problems

Can you tell me about some of the problems troops and families experience as a result of deployment? Let's start by making a list of all the problems troops and families can experience. (*Probe for pre-, post-, and during deployment.)* (*Create list on whiteboard.*)

Which of the listed problems tend to be more common? *(Probe for pre-, post-, and during deployment.*)

Can you tell me which of these seem to be more worrisome to troops and families? (*Probe for pre-, post-, and during deployment.*)

Needs

Now I would like to talk about the kinds of help troops and families need to address these problems.

What are some of the needs troops and families may have when experiencing the problems we have listed? (*Probe for pre-, post-, and during deployment.*)

Can you tell me which of these needs correspond to the listed problems?

Solutions

Now I would like to talk about some options troops and families have for meeting these needs. Can you tell me the kinds of options troops and families have for dealing with these needs? (*Probe for on- and off-base programs, as well as individuals.*)

Which of these services or individuals are best suited for the needs we have listed? (*Correspond on whiteboard.*) Which of these services or individuals are not available on or off base? Which of these needs don't have any solutions?

Can you tell me who would use these services or go to the individuals listed? Can you tell me who would not use these services or to go the individuals listed?

Barriers and Bridges

Let's talk about why someone would or would not use the services or go to the individuals we've listed. Why would someone not use the services or go to an individual?

Can you tell me what would make it harder for someone to use the service or go to a given person? (*Probe for on- and off-base programs as well as individuals.*)

Can you tell me what would make it easier for someone to make use of a service or to go to someone? (*Probe for all options on- and off-base—programs and individuals.*)

Needs Met

Now that we have gone through a list of potential problems, possible needs and solutions, and who uses the services and individuals available, I want to talk about what can be done to better support troops and their families.

What would you change to improve military families' ability to meet their deployment-related needs? (*Probe for on- and off-base programs as well as individuals.*)

If you were given a limited number of resources, where would you devote them and why? (*Probe for all on- and off-base.*)

Outcomes

Do you think the needs that we've discussed today affect troops' work performance? If so, how? If not, why not?

Do you think that these needs can affect a troop's decision to re-enlist? Why or why not?

Concluding Remarks

Thank you so much for your time and for sharing insights from your experiences working with troops and/or their families. Your contribution will help us and ultimately the Services to better understand some of the changes that troops and families experience as a result of deployment. Before we go, are there any questions you have of us, or any last comments you would like to make?

Here are our business cards in case you have questions about the study later.

Thank you.

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