A STUDY TO IDENTIFY JOB SKILLS REQUIRED FOR A U.S. ARMY RESERVE RETENTION AND TRANSITION AREA MANAGER

By

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ABSTRACT

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A Study to Identify Job Skills Required for a U.S. Army Reserve Retention and
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The purpose of this research study is to identify the job skills required for a United States Army Reserve (USAR) Retention and Transition Retention Area Manager to possess, in order to successfully perform his or her job. A Task Selection and Analysis Board (TSB) will conduct job analysis by reviewing the total task inventory and performance data.. The purpose of the board will be to recommend which task and skills to be included in developing and comprehensive training program of instruction (POI) to train Area Managers. The board will consist of subject matter experts drawn from the USAR Retention and Transition field.

Currently, the USAR Retention and Transition Retention Area Manager's have no formal schooling they are required to attend after completion of initial Retention and Transition Non-Commissioned Officer (NCO) training in this field. That training

consists of the Retention and Transition NCO (RTNCO) course taught at the Army Reserve Readiness Training Center (ARRTC), Ft. McCoy, Wisconsin. This is a three-week course that instructs newly assigned Retention and Transition NCOs on the initial job skills required to be successful as a USAR Retention and Transition NCO, (Retention and Transition NCO Program Of Instruction, 2000). The soldiers are awarded the Military Occupational Skill (MOS) designator 79V upon successful completion of this course. There is currently no follow-up training, advanced or refresher for Retention and Transition NCOs. The only other retention training offered is the Retention and Transition Manager's Course (RTMC), which is also taught at the ARRTC. This is a two-week course designed for the senior level officer and senior level NCO at each major or separate USAR unit command, (Retention and Transition Manager Course Program of Instruction, 1999). It certainly deals with some of the same subjects that any Retention Area Manager's training must include, but does not address all the aspects that the Retention Area Manager must be able to accomplish to be successful.

The Department of the Army (DA) developed recent regulatory changes, and along with command guidance created the new Retention Area Manager's position. The position is designed for a senior NCO who will be responsible for the actions, job performance and training of USAR Retention and Transition NCOs assigned to his or her area of operations, (Army Reserve Tactics, Techniques and Procedures Handbook for Retention and Transition, 2001). It is critical that the job skills and tasks be identified for the position. This will enable quality training for the individuals to occur and prepare them as they step into a position as Retention Area Manager that is critical to the U.S. Army Reserves retention and transition efforts.

The Task Selection Board will address the following areas: 1) task analysis and selection; 2) training references; 3) training delivery modes; 4) training sequence; 5) training target audience; 6) course description; and 7) training length. The TSB will be established and operated in accordance with regulatory guidance contained in two references the (Army Reserve Readiness Training Center Regulation 351-1-1, Systems Approach to Training, 1999), and the (Training and Doctrine Command (TRADOC) Regulation 350- 70, Systems Approach to Training Management, Processes, and Products, 1999). It will eventually be staffed through ARRTC and the Office of the Chief of the Army Reserve, Retention and Transition Division, (OCAR-RTD) prior to full implementation. This paper forms the foundation for the first portion of the Analysis Phase of the Systems Approach to Training (SAT), (Army Reserve Readiness Training Center Regulation 351-1-1, Systems Approach to Training, 1999). It will deal strictly with the results from Task Selection Board and analysis derived from that board. It will not address nor follow the course development through the remaining phases of SAT process, the pilot process nor the eventual full implementation of the course.

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CHAPTER I

PROBLEM DEFINITION

Introduction

The U.S. Army Reserve manpower strength is dependent upon two factors; the ability of new soldiers to be recruited into service and the ability retain existing soldiers in service. The first factor is the job of the United States Army Recruiting Command (USAREC) located in Fort Knox, Kentucky. The second factor is the job of Retention and Transition Officers and NCOs of the U.S. Army Reserve. Their mission as defined by (United States Army Reserve Command (USARC) Pamphlet 140-1, 1999) is to "enhance personnel readiness of units by retaining soldiers who are eligible to reenlist."

NCOs will typically attend two courses specifically targeted to train Retention and Transition NCOs. These are the Retention and Transition NCO Course (RTNCO) (Retention and Transition NCO Program Of Instruction, 2000), and the Retention and Transition Manger's Course (RTMC), (Retention and Transition Manager Course Program of Instruction, 1999). In the RTNCO course, the soldier is awarded a Military Occupational Skill (MOS) identifier 79V. The current version of the RTMC is designed for Senior Active Guard and Reserve (AGR) Officers and the Senior AGR Retention NCOs assigned to U.S. Army Reserve senior level commands.

However, the target audience of the RTMC will change based upon new regulatory guidance, developed by the Office of the Chief of Army Reserve- Retention and Transition Division (OCAR-RTD) and published in the (Army Reserve Tactics, Techniques and Procedures Handbook for Retention and Transition, 2001), manual. OCAR-RTD is the policy making governing body for all retention and transition training issues for the U.S. Army Reserve. This new guidance creates a new job position in the Retention and Transition field called Retention Area Manager. The Retention Area Manager will be responsible to supervise and manage USAR Retention and Transition NCOs at the unit level, in an area assigned to the Retention Area Manager. Typically the Retention Area Manager will supervise and manage five to seven units with each unit having two to four RTNCOs. These may be geographically quite diverse and the units often will be hundreds of miles apart. So a solid training foundation for the Retention Area Managers will be a key to the successful implementation by the USAR of any retention and transition program.

To effectively train Retention Area Managers to successfully supervise and manage in this environment, it is essential to develop an effective training program. The training program must go well beyond the current RTMC and focus on the training for the new Retention Area Managers. A well-trained Retention Area Manager work force will be a key to the successful implementation of any policy from OCAR-RTD and the U.S. Army Reserve. In a Memorandum, K. F. Peterson (personal communication, dated August 29, 2001), the Director, OCAR-RTD tasked the ARRTC to develop and prepare to implement a course to do just that.

The U.S. Army has a systematic approach to any course development. This is simply called the Systematic Approach to Training (SAT). It is governed by (TRADOC Regulation 350-70, Systems Approach to Training Management, Processes, and Products, 1999) and is supplemented by (ARRTC Regulation 351-1-1, Systems Approach to Training, Department of the Army, 1999). This last regulation is the ARRTC's adaptation of TRADOC Regulation 350-70 for use by the ARRTC in training USAR forces. During the Analysis phase of SAT, (ARRTC Regulation 351-1-1, Systems Approach to Training, Department of the Army, 1999) states that a Task Selection Board (TSB) will be convened to determine the direction the Area Manager proposed new course will take. It will further provide the foundation for future development of the course. The current RTMC course has some similarities, and the material will be utilized in course development. However, the new Area Manager course will have to go well beyond the RTMC course and redefine the target audience, job tasks and other course development material to effectively include this new audience in the training. The analysis of the Retention Area Manager's job for inclusion in the RTMC, as defined from the Task Analysis Board will be the focus of this study. Ultimately the Task Analysis Board will determine the future direction and focus of training for USAR Retention and Transition Managers.

Statement of the Problem

The purpose of this study is to identify the initial tasks necessary for training that a newly assigned Retention and Transition Manager or Retention Area Manager will need to be trained on to successfully perform his or her job. This will include initial identification of tasks, tasks performance steps, references, conditions, standards, materials and safety factors. The board will convert job tasks into training actions, which must then be performed to performance standards identified during the board and allow for demonstration sufficient to ensure mastery of the necessary job skills. This analysis will serve as the initial information base for the further development, design and implementation of the course as specified in (ARRTC Regulation 351-1-1, Systems Approach to Training, Department of the Army, 1999) and (TRADOC Regulation 350-

70, Systems Approach to Training Management, Processes, and Products, 1999). Performance steps and other key information will be identified using the Task/Learning Analysis Worksheet (T/LAW), which is contained in Appendix A.

Research Objectives

The objectives of the research study are as follows:

1. Compile and document critical information that is identified by the Task Selection Board and through the creation of the T/LAWs for each task. This will include a task list, training sequence, training references, safety and environmental considerations, training duration, training actions, training conditions and training standards.

2. Identify the course target training audience, course length in instruction hours and course description. These will all eventually be part of the final Program of Instruction (POI) that will be piloted and eventually implemented.

Significance of the Study

The study will provide a basis to determine the future direction and focus of training for USAR Retention and Transition Managers. This analysis will serve as the initial information base for the further development, design and implementation of the course as specified in (ARRTC Regulation 351-1-1, Systems Approach to Training, Department of the Army, 1999) and (TRADOC Regulation 350-70, Systems Approach to Training Management, Processes, and Products, 1999). It will be a key piece in the training provided to Retention Area Managers as they coordinate the USAR efforts to retain quality personnel and ensure the future strength of the U.S. Army Reserve.

Limitations of the Study

The following are limitations to the study:

1. The time allotted for the analysis of the Retention Area Manager job is limited to three month's with only one week dedicated to the actual conduct of the board.

2. Selection of the board members is limited based upon the losing command's willingness to let them participate in the process.

3. Since this is a new job, there is a limited amount of actual field experienced Retention Area Managers, all of whom have a very limited amount of actual on the job experience.

4. The Tactics, Techniques and Procedures Manual is the key regulatory guidance on Retention Area Manager and defines the roles, responsibilities and duties of the Retention Area Manager. Unfortunately the manual is still in a DRAFT format, and there are many changes some significant that will ultimately need to be made to the document.

5. Course development is limited to and governed by existing official publications. All development must meet the criteria set forth in the regulatory and other official publications.

Assumptions

The following assumptions apply to the study:

1. Even though in DRAFT, the (Army Reserve Tactics, Techniques and Procedures Handbook for Retention and Procedures, 2001) Manual is still accurate in all key areas.

2. The board members will be able to accurately define the Retention Area Manager job, even though they have little on the job experience.

3. The researcher will be able to accurately facilitate the board and analyze the information.

<u>Definition of Key Terms</u>

AGR: (Active Guard Reserve), reserve and national guard soldiers on full time active duty in direct support of the U.S. Army Reserve and U.S. Army National Guard.

AORS: (Army – PERSCOM Orders and Resource System), a system for the U.S. Army to create, maintain and modify assignment orders for the U.S. Army.

ARRTC: (Army Reserve Readiness Training Center), the schoolhouse for the U.S. Army Reserve. Responsible to develop, maintain, export and train USAR specific subject and topics as assigned and directed.

CRRT: (Commander's Retention Readiness Tool), A report from the LEADSOURCE program that unit commanders use to assess the unit's overall retention health and climate.

ESGR: (Employer Support of the Guard and Reserve), Mandated statutory guidance for employers who have employees that are active drilling U.S. Army National Guard and U.S. Army Reserve soldiers.

IRR: (Individual Ready Reserve), U.S. Army Reserve soldiers that are not in an active drilling status. They names are maintained on a database and their only requirement is to update their contact information once per year as long as they are a member of the IRR. In the event of a national emergency they could be called to active duty.

ITRR-GIS: (Individual Training Requirements and Resourcing Geographic Information System), a web based program that allows access to many useful reports and data for unit commanders to uses in assessing not only the units retention health and climate, but many other useful command information.

NCOER: (Non-commissioned Officer Efficiency Report), an efficiency report written at least annually by an NCOs supervisor quantifying and evaluating that NCOs job performance. It is used as a basis for future promotions and job assignments within the USAR.

OCAR-RTD: (Office of the Chief of Army Reserve – Retention and Transition Division), the policy office of the U.S. Army Reserve in all soldier retention matters.

PERSCOM: (Personnel Command), U.S. Army Personnel Command, responsible for all personnel actions in the U.S. Army.

POI: (Program of Instruction), a document that defines the instructional criteria for a course. It contains terminal learning objectives, equipment lists, evaluation and testing plans.

LEADSOURCE: a leads system that uses an automated software program to support personnel assignment actions, and is used as a primary lead source by RTNCOs and Area Managers.

DMS: (Data Maintenance System), allows individual users to see the Total Army Personnel Data Base – Reserve for information on potential IRR transferring soldiers.

SOLNET: (Soldier Network), the system that DMS is part of and through which soldiers access DMS.

QAS: (Quota Allocation System), a real time system designed to facilitate accessioning of soldiers into the USAR.

RAS: (Reserve Application System), allows individual users to see the Personnel Data Bases for information on potential transferring soldiers.

RPC: (Reserve Partnership Council), a council coordinated by USAREC for the purpose of improving coordination between USAREC and USAR units for the purpose of recruiting and retention.

SMARTBOARD: a board maintained in recruiting and retention offices that details key retention and recruiting information.

SAT: (Systematic Approach to Training), the U.S. Army system used to analyze, develop, design, implement and evaluate training.

T/LAW: (Task Learning Analysis Worksheet), a document produced during the SAT Analysis phase that identifies the Task, Action, Condition, Standard and Performance steps of a training task.

TPU: (Troop Program Unit), U.S. Army Reserve units made of almost entirely of part time soldiers that drill one weekend a month.

TRADOC: (Training and Doctrine Command), U.S. Army Command responsible for developing and implementing training and training doctrine within the U.S. Army.

TSB: (Task Selection Board), the part of the SAT analysis process used to identify specific job tasks and all data that goes with the job, for the purpose of developing training.

USAR: (United States Army Reserve), the “citizen soldier” portion of the U.S. Army. The majority of the USAR is made up of part time soldiers that have full time non-military jobs in the civilian sector and part-time military jobs.

USAREC: (United States Army Recruiting Command), responsible for all recruiting operations for new U.S. Army and U.S. Army Reserve soldiers entering service.

CHAPTER II

REVIEW OF LITERATURE

Introduction

The purpose of this chapter is to review existing literature both past and present regarding the U.S. Army Reserve Retention Manager. The literature from this chapter will provide a base from which the study can proceed and a training program foundation can be laid. The literature is categorized into three main categories: regulatory guidance, official pamphlets the present Program of Instruction. The literature that will be used in the developing of this training program falls under the umbrella of official publications and the development of the course is required to adhere to these official documents. However, it is important in developing the course to understand what has occurred prior to the proposed development of the future Retention Manager course, as well as the limitation placed upon course development by existing regulatory and official publications.

Regulatory Guidance

The first category is regulatory guidance. This includes Army Regulations (AR), Forces Command Regulations (FORSCOM Regulation), U.S. Army Reserve Command Regulations (USARC Regulation), Training and Doctrine Command Regulations (TRADOC Regulation), and Army Reserve Readiness Training Center Regulations (ARRTC Regulation). These are the main source of official guidance and policy to ensure that the performance standards meet the needs of the U.S. Army Reserve.

Key among these is (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). This regulation provides policy, internal controls, responsibilities and procedures for the United States Army Reserve Readiness Training Center to execute the five phases of the Systems Approach to Training. It is intended as a supplement (TRADOC Regulation 350-70, Systems Approach to Training Management, Processes, and Products, 1999), which is designed for application to the Active Component of the United States Army. ARRTC Regulation 351-1-1 is designed to take the TRADOC procedures, modify them and apply to them to training analysis, development, design, implementation and evaluation, for use and application for the U.S. Army Reserves.

Combined together ARRTC Regulation 351-1-1 and TRADOC Regulation 350-70 provide strict limitations and guidance to all SAT phases. They take the course developer step-by-step through a systematic process to ensure that courses are analyzed, designed, developed and implemented in a manner which will best meet the Army's needs.

The second main regulation, as mentioned, is (TRADOC Regulation 350-70, Systems Approach to Training Management, Processes, and Products, 1999). This regulation is very similar, but much more comprehensive. It applies to all Army training development and is not specific to course development at the ARRTC as in the case of ARRTC Regulation 351-1-1. In general it applies to all Army training development, but it specifically designed for use by the Active Army Component.

It sets forth guidelines, policy and specifications for both individual and collective training development. Just like the ARRTC regulation, TRADOC Regulation 350-70 sets up regulatory guidance for implementation of the five phases of the Systems Approach to Training. It is the governing authority for all U.S. Army training and training development management. It identifies training requirements. It lays out specifics for individual and collective training development. Finally, it provides guidance and procedures for the U.S. Army training evaluation and quality assurance programs, to include instructor certification and the Total Army School System (TASS) accreditation.

A companion document to the TRADOC regulation is the (TRADOC Systems Approach to Training Desk Reference, 1985). The desk reference is simply a quick guide and job aid for use by training and course developers. It is intended to help developers find needed material within the TRADOC regulation for use in developing both collective and individual training.

(USARC Regulation 140-6, the U.S. Army Reserve Command Retention and Transition Personnel Handbook, 1999), is designed to provide specific guidance to retention and transition personnel "concerning their retention and transition duties and responsibilities." It addresses all levels of retention personnel and the various jobs they may perform. It however, does not say anything specifically about the new Retention Area Manager position. Still many of the tasks that were once lumped under retention personnel, will now likely be redefined and placed in some capacity under the Retention Area Manager duties, roles and responsibilities.

(Army Regulation 140-111, the U.S. Army Reserve Reenlistment Program, 1997), provides key regulatory guidance on the overall responsibilities, procedures and procedures for the U.S. Army reenlistment program. It sets eligibility criteria for reenlistment, as well as guidance for processing members for continued service in the U.S. Army Reserve. As such, it is a key reference in any development of training programs for retention and transition personnel.

In addition to the regulations listed above, there are a vast number of specific regulations on individual U.S. Army and U.S. Army Reserve programs that are covered by their own regulatory guidance. These will be used as references for specific lesson plan development of identified tasks that will ultimately be a part of the final Program of Instruction. For instance, (Army Regulation 135-91, Service Obligations, Methods or Fulfillment, Participation Requirements and Enforcement Procedures, 2000), defines service obligations for the Army National Guard and U.S. Army Reserve. It would be used as a reference and to develop s specific class on that subject.

Other regulatory guidance used in this capacity include (Army Regulation 135-180, Qualifying Service for Retired Pay Nonregular Service, 1987) and (Army Regulation 140-185, "Training and Retirement Point Credits and Unit Level Strength Accounting Records, 1999). These are just a few of the multitude of regulatory reference material available for course and lesson plan development. As part of the Task Review/Selection Board process will identify as many of these references as possible. The list will be refined during lesson plan development and updated.

Official Pamphlets

This includes Department of the Army Pamphlets (DA Pamphlet) and U.S. Army Reserve Command Pamphlets (USARC Pamphlet). Although not regulatory in design, these publications are used in much the same way as regulations and carry nearly the same official weight as regulatory guidance.

The key document in this category is (USARC Pamphlet 140-1, United States Army Reserve Command Retention and Transition Personnel Handbook, 1999). It is designed as a supporting document to USARC Regulation 140-6, and provides "specific retention and transition duties for retention and transition personnel, examples ad samples to assist with accomplishment of assigned duties.

It specifically addresses, not only the duties of retention and transition personnel, but transfer processing, lead generation, prospecting and interview procedures. It gives specific examples of forms and reports that are invaluable to retention and transition personnel.

Next there are several manuals that will need to be taken into consideration. These include Field Manuals (FM), Student Training Publications (STP) and Soldier's Manual of Common Tasks (SMCT). These documents are the "how to" publications for many identical or related skills and tasks that will be incorporated into the 79V Soldier's Manual.

The key document in this category is the newly developed Training, Techniques and Procedures Handbook for Retention and Transition, dated September 28, 2001 and still in DRAFT format for the U.S. Army Reserves. This handbook defines the Army Reserve Retention and transition Program and provides specific retention and transition duties for unit personnel to assist them in the accomplishment of their duties.

Finally, the current (Retention and Transition Managers Course Program of Instruction (POI), 2000) will be used. It contains pertinent historical memorandums, current task list, Training and Learning Analysis Worksheets (T/LAW), and Terminal and Enabling Learning Objectives for the course. This will be vital information in developing task action statements, conditions and performance standards, as well as refining needed materials and references.

Program of Instruction

The current program of instruction was developed in January 2000. It is a good source of information and at time it may be a starting point for task analysis and development. The problem, is that since the Retention Area Manager is a new job, the current document was designed to support a different target audience that did not include the Retention Area Manager. Many of the tasks will be similar and some may even be the same, however, it is highly likely that the Task Review/Analysis Board will identify many different tasks that the Retention Area Manager does, and will modify existing tasks. This would be in keeping with the new regulatory guidance on the duties, responsibilities and roles of the Retention Area Manager.

Summary

There is virtually an unlimited amount of literature available for this study. Due to the nature of the final product being used specifically for the U.S. Army Reserve, the review of literature was limited to military sources. Much of the literature is specific in nature to a particular task. However, several key publications and documents provided essential overview to be able to pull all the sources together into one final and understandable publication. As stated these include ARRTC Regulation 351-1-1. TRADOC Regulation 350-70, and the accompanying desk reference, the Army Reserve Training, Techniques and Procedures Handbook for Retention and Transition, USARC Regulation 140-1, USARC Pamphlet 140-6 and Army Regulation 140-111.

CHAPTER III

RESEARCH METHODS AND PROCEDURES

Research Design

The first step was to conduct a comprehensive review of existing literature. Based upon this review critical tasks are identified that are essential for the performance of the U.S. Army Reserve Retention Area Manager job. The primary forum in which these tasks are initially identified is during a Task Review/Analysis Board as prescribed in (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). The board uses a format, requiring a trained facilitator to facilitate discussion between five to nine subject matter experts. The goals of the Task Review/Analysis Board are as follows and are entered on a Task/Learning Analysis Worksheet:

1. Identify course target audience.

2. Identify course task list. The tasks will be the Action statement for Learning Objective development and set forth the specific action that the student will be required to accomplish during training. The Action must be easily measurable in order to evaluate the student's performance to determine if actual learning has taken place. The selection of the appropriate verb for the action statement is one the key to course development. A standard verb list as developed by the U.S. Army, is contained in (TRADOC Regulation 350-70, Systems Approach to Training Management, Processes, and Products, Appendix D, 1999). An example of an action statement is, "Develop a Training Outline".

3. Determine the training conditions that exist during training. These are specific and apply to the exact training conditions the student will face. For example, "In

a classroom environment given a learning objective, planning worksheets, a training outline format, a Student Course book and supporting references".

4. Determine the standards of performance that the student will be required to meet in order to demonstrate mastery of the task. For example, "Training outline will be developed using the training outline format and information from the planning worksheets, and the student will develop, and present a training session to students and/or staff acting as an audience".

5. Each task will then have performance steps developed, that be specific and identify the specific actions, in order, that the student must accomplish in order to successfully demonstrate proficiency of the task. For example, step one might be "prepare the planning worksheets" and step two "develop a training outline worksheet".

6. Next any related knowledge for the task being developed will be identified. For the examples used above, related knowledge might be use of Micro Soft Office products if they are typically used by an Area Manager in developing a training outline and will be used in class.

7. As many specific references to the training subject as possible will next be identified. Although this list may not be exhaustive, certainly a key to future course and lesson plan development will be specific references.

8. Materials and equipment that will be needed in the classroom are also identified. These again are not necessarily exhaustive, and as the course and lesson plan are developed, this list will most likely change.

9. Finally, the tasks are sequenced in a proposed instructional sequence and grouped into related topics. This assists in later development to ensure that the course

flows in a logical sequence. It also ensures that the course builds logically and that a subject is not taught out of order. This becomes critical when you need to ensure you training on one topic occurs prior to training on another topic. For instance, it is necessary to train a soldier how to load a rifle, prior to teaching him how engage a target.

The initial task analysis board was conducted in August 1987. From the results of this board the course went through a 5 phase systematic development as specified in TRADOC Regulation 350-70 and ARRTC Regulation 351-1-1. The course came on line in the spring of 1988. Per regulatory guidance, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999) all ARRTC courses are required to undergo a periodic review every three to five years, or when there is s significant change to the job requirements, regulatory requirements of other factors which might significantly effect the training that would need to be conducted. Such a change occurred in 2000, when the United States Army Reserve Command began a transition with the United States Army Recruiting Command concerning the responsibility for transitioning soldiers into the U.S. Army Reserve from the Active and Individual Ready Reserve. In 2001, the Office of the Chief of the Army Reserve directed that the course be reentered into the analysis phase and a training program be developed to train the new Retention Area Managers, (Memorandum dated August 29, 2001, subject “Task Review Board (TRB) for the Retention and Transition NCO Course”, Department of the Army, Office of the Chief, Army Reserve, Chief, Transition and Transition Division, 2001).

Planned Instrumentation

The system the Army uses to make decisions in the development and design of training is called the Systems Approach to Training (SAT). The SAT process will be used in the review and development of the Retention and Transition NCO Course. The process involves training related phases of analysis, design, development, implementation and evaluation.

During the analysis phase, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999), job tasks are identified and described in order to determine what is to be trained. In order to ensure a quality product at the end of the process, it is essential that this phase be through, as it will provide a base for all subsequent activities in the process. In the case of this course a tasking letter from the Chief, Retention and transition Division of the Office of the Chief of the Army Reserve was received on August 29, 2001. At that point the following steps were conducted: research of the job area, job area analysis, collection of performance data, task analysis and selection, system delivery and decision to resource.

During the next phase, design, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999), the data from the task analysis compiled from a task review board, conducted in December 2001, was developed into a blueprint for training. During this phase the following tasks were accomplished: creation of learning objectives, establishment of a training sequence, determination of learning strategies, design of the course testing program, design of the course pilot evaluation program and development of a working Program of Instruction.

During phase three, development, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999), a validated training product is produced. Although this study will not cover this or the subsequent phases, a brief explanation of what they involve is included here for a complete understanding of the entire SAT process. During the development phase course tests and a student achievement plan are developed. In addition, lesson plans, practical exercises, and all training material are developed and written. Job aids, refinement of instructional times, references, and ensuring training resources to include trained instructors are on hand are also part of this phase. The final culmination of this phase is the conduct of a pilot program, which is used to validate all aspects of the course. It is done using the pilot evaluation plan developed during the previous phase.

Phase four, implementation, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999), is where the course is implemented and training begins. This phase requires the execution of validated training, implementation of the testing program and development of the course evaluation program to set up the procedures to provide continuous feedback and course maintenance.

Phase five of the SAT process is evaluation, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). Although this phase is continuous during all the previous phases of SAT, the bulk of the process is developed and implemented following phase four. This phase provides the overall evaluation methodology for evaluating training, training products and the processes.

Population

The population for the study is defined as all 79V Retention and Transition NCOs, in the rank of Master Sergeant, assigned to Area Manager positions, within the U.S. Army Reserve force structure. Although the exact numbers vary on a daily basis, the figure normally is around 150 soldiers.

Data Analysis

The results of the Task Review/Analysis Board provided interesting feedback in several areas. These can be categorized into three major topics, automation training, practical hands on training and regulatory training.

The current RTMC course has instruction on the many automation systems that the Retention and Transition Manager is required to utilize, but the instruction for the most part does not include hands on or practical use of those systems. In many cases it is simply computer-generated slides that show the NCO what he/she should see, but no chance to access the computers, utilize the programs and access web sites. The opinion of those who responded to the survey was that this is a serious deficiency in the current course and seriously degrades the value of the training. In addition, the instruction was not focused on the Retention Area Manager, since this is a new job position.

Although many of the current RTMC course lesson plans include hands on training and practical exercises there is plenty of room to include more of this kind of instruction in many areas. The key ones pointed out by the board include actually assembling a reenlistment packet, a warrant officer and Active Guard and Reserve (AGR) Recruiter Hire packet. The board also identified a need for additional training on interviewing skills, communication skills, interpersonal skills and training development skills.

The board was very pleased with the current format and instructional methods for training on regulatory topics. For the most part these were the key subjects of reenlistment eligibility and reenlistment incentives. The current method is very hand on oriented. The students are required to actively open the governing regulations, search them repeatedly in several case studies and practical exercises, and determine answers to eligibility and incentive questions. The intent of the class was not to necessarily teach the information, but rather where to find the answers in the massive amount of regulatory guidance and how to use these regulations as job aids.

Finally, there was concern about the general effectiveness of the course in general. Although all respondents felt the course had helped prepare them to more effectively perform their jobs as a Unit RTNCO, they also felt it could be much more effective. The course topics were generally designed as stand alone classes, and do not do a great deal of building on each other. The course was generally taught in a linear format. In other words although some classes were dependant upon instruction from a previous class and built on that knowledge, most did not. They felt that the course should try to bring these topics together and actually more accurately replicate the things a RTNCO will do on the job on a daily basis.

The results from these surveys provided a base for the implementation of the next part of the analysis phase, the Task Review Board. The Task Review Board was conducted December 14 through 18, 2001.

CHAPTER IV

DATA ANALYSIS AND INTERPRETATION

<u>Overview</u>

The task review board was conducted December 14 through 18 at the ARRTC building, Fort McCoy, Wisconsin in Distance Learning classroom number two. The first critical step in the conduct of the TRB was the selection of the members for the TRB. The criteria for the selection of the members became a critical step. Without quality subject matter experts, the information gathered from them would be suspect. The number of voting board members was fixed at seven, with additional non-voting members invited. Seven voting members was the maximum number of people the facilitator felt he could adequately facilitate and manage. Of the seven, six of the members were randomly selected using the criteria listed below.

1. Currently serving as an Area Manager.
2. In position as an Area Manager a minimum of 6 months.
3. No command to be represented by more than one voting member.
4. A geographically diverse population was desirable.
5. Voting members should represent all levels of command where Area Managers were assigned and serving.
6. The soldier must be available during the TRB dates.
7. The soldier's command must be willing to send the soldier for temporary duty at Fort McCoy for the TRB.

The seventh representative came from OCAR-RTD. This is necessary, since OCAR-RTD is the policy making body for the Retention and Transition field in the

U.S. Army Reserve, which includes the unit RTNCO. OCAR-RTD would have valuable input on the training to be conducted and the eventual implementation of that training. Their "buy in" on the TRB process would also be critical to successful future approval and implementation of any training program.

The remainder of the people on the TRB would be non-voting members. They would be present for administrative support, for expertise if questions arose and so that they would understand the proceedings as the course continued in the development, design, implementation and evaluation phases after the TRB. These included the following:

1. At least one representative from the instructional team at ARRTC to provide expertise and institutional knowledge on any questions concerning the conduct and instruction of the current RTMC and RTNCO courses.

2. A representative from the Soldier Support Institute (SSI) in Ft. Jackson, South Carolina. This is necessary since SSI is the proponent that holds final approval authority over the Program of Instruction for the RTNCO and the awarding of the MOS 79V. Their understanding of the proceedings and "buy in" to the TRB process would be critical in the final approval of the POI for awarding of MOS 79V.

3. A recorder, to record the board proceedings.

4. At least one trained facilitator to facilitate the process.

There was also a great deal of equipment necessary for the conduct of the board. The TRB equipment list is included in Appendix E.

Summary Results

The TRB identified 26 tasks during the job analysis portion of the board. These tasks were developed and further sorted into six instructional clusters. These were titled Roles and Responsibilities of the Retention and Transition Area Manager, Leadership, Retention Management, Management Systems, Retention Missions and Retention Processing Systems. Each task was also individually developed to include task title, conditions, standards, performance steps, related knowledge, sequence, references, and materials and equipment.

The task title was the first key to task development, because it identified the verb to be used, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). The verb selection is critical to ensure that the task is developed to measure what exactly it is that needs to be trained. In addition, TRADOC gives guidance as to what verbs they do and do not prefer used in the development of military training. The tasks developed are included in Enclosure 1.

Conditions are simply the conditions in which the task will be trained. Although different from the actual conditions the soldier will encounter while on the job, the key is to replicate as close as possible actual job conditions in the classroom. The term "Standards" refers to the standards the student is required to meet to successfully demonstrate competency on each task.

Performance steps are the hardest and perhaps the most critical part of the task development process. During this step the board determines the exact steps that will be trained to meet the action of the task title. These will be ordered in the sequence they are taught and should replicate as close as possible the steps the soldier will perform the duty while on the job.

In addition, the related knowledge each soldier will need to come to the classroom knowing prior to instruction. Each task will also be given a suggested instructional sequence that best facilitates the course flow and learning atmosphere for the student. Finally, any references, materials and equipment the student and or instructor will need, are identified to facilitate lesson plan development and student learning.

Overall Analysis of Results and Major Findings

The most significant result of the TRB, came at the conclusion of the board, as it became apparent, there was almost no correlation between the current RTMC course and the new Area Manager course. Only one task from the old RTMC course was included in the new task list for the new Area Manager course. It quickly became apparent that the Area Manager was heavily involved in automated systems, that the Retention Manager at higher levels, may have an understanding of, but not know how to, nor need to know how to actually operate. These included the following systems:

1. Data Maintenance System (DMS), which allows individual users to see the Total Army Personnel Data Base. This is critical to gain access to information on potential transferring soldiers.

2. Soldier Network (SOLNET), which is a personnel data base system that allows retention soldier's access to DMS.

3. Quota Allocation System (QAS), a real time system designed to facilitate accessioning of soldiers into the USAR.

4. Reserve Application System (RAS), which allows individual users to see Army Personnel Data Base Systems with information on potential transferring soldiers.

5. Unrefined Lead Source System (ULSS) which is a leads system that uses an automated software program to support personnel assignment actions, and is used as a primary lead source by RTNCOs.

Area Managers are required to have an intimate knowledge on how use these systems, extrapolate the data and analyze it for use in unit retention mission accomplishment. The Retention Managers at the next higher level had almost know need how to utilize the equipment and programs, and merely needed to know that the systems existed and certain information could be found on them, but not necessarily how to actually utilize each system.

In addition, Area Managers are directly responsible to establish, implement and evaluate effective training programs for each RTNCO assigned to his or her area of operations. The Area Manager is the primary trainer, and must be familiar with how to identify training needs, set-up training, conduct training and evaluate training.

A total of 17 critical tasks were identified and developed by the board. These were six training categories: Roles and responsibilities of the Area Manager, Leadership Issues for the Area Manager, Retention Management, Retention Management Automated Systems, Retention Missions, and Retention Processing Systems. A tentative course sequence allowed for initial instruction to begin with Roles and Responsibilities, followed by Leadership Issues and Retention Management. Each of these would lay a foundation for the key portion of the course, training on the utilization of the numerous automated and manual retention management and processing systems in achieving the unit retention mission. The board recommended a course heavy in "hands-on" practical exercises in the conduct and operation of these systems, as well as how to plan and conduct training for subordinates.

Finally, the current course structure is a very linear approach to training. Simply stated, each class and task is fairly independent and can be taught independently. Although that can be advantageous, the board felt that a course that built upon itself would better facilitate learning. In other words, they felt the course should require that mastery of later topics in the course, would depend upon the student's full grasp and competency in previous tasks and lessons.

Summary Conclusions

The training recommended by the task Review Board would include a heavy automation and regulatory portion that would directly reflect the job tasks that a new 79V Retention Area Manager would be required to accomplish upon entering his or her new assignment. The new course would have little in common from the current Retention and Transition Manager Course, and would require a comprehensive rewriting of the program of instruction, testing material and lesson plans, to include slides, references, handouts, practical exercises and other supporting material. In addition, the new Area Manager course would be heavy focused on automation. It would include comprehensive instruction on the operation, day-to-day utilization of the retention related automation programs, as well as instruction on interpretation and analysis of data taken from reports produced by these automated systems. Finally the course would include instruction on identifying training needs, planning training sessions, executing training and evaluating training, in order to assist the new Area Managers in training the retention force in their assigned area.

CHAPTER V

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Restatement of the Problem: The purpose of this study is to identify the initial tasks necessary for training that a newly assigned Retention and Transition Manager or Retention Area Manager will need to be trained on to successfully perform his or her job.

Methods and Procedures: After a comprehensive review of existing literature, critical performance tasks were selected as prescribed in, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). These tasks were identified during a Task Review/Analysis Board conducted at Ft. McCoy, WI, using subject matter experts from the USAR retention and transition field. A trained facilitator board conducted the proceedings using seven identified subject matter experts. The board had the following specified goals:

1. Identify course target audience.
2. Identify course task list.
3. Determine the training conditions that exist during training.
4. Determine the standards of performance that the student will be required to meet in order to demonstrate competency of the tasks to be trained.
5. Develop performance steps for each task.
6. Identify all related knowledge for the task being developed.
7. Identify as many specific references related to the training subject as possible.
8. Identify all materials and equipment that will be needed to conduct training.
9. Develop a proposed training sequence.

The Task Review/Analysis Board used information collected from a task analysis board was conducted in August 1987 as a baseline for development of new tasks for the

Area Managers course. The development of the new course is required to follow the developmental outlines prescribed in, (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999).

Major Findings:

1. The most significant result of the Task Review/Analysis Board developed as the board progressed and became fully apparent at the conclusion of the board. Although the current Retention and Transition Manager's Course Program of Instruction was utilized as a base document for task development, it quickly became evident that there would be little similarity between the tasks in the old course, and those in the new Retention Area Manager course. Of the 17 identified critical tasks that were developed for the Retention Area Manager course, only 1 was actually duplicated from the old RTMC course.

2. Closely related to the above finding, the board determined that the Retention Area Manager would be heavily engaged in the utilization of numerous automated systems. This is far different than the current RTMC Program of Instruction is designed to train. Even though the old RTMC Program of Instruction trained tasks on some of the automated systems, this training involved interpretation of selected refined data from reports the systems generated. The audience for the old RTMC course did not need to know how to generate the reports, or even how to do a great deal of analysis of the data, just what the reports were and some major information that could be gleaned from those reports. The Retention Area Manager on the other hand, needed not only to know how to do a detailed analysis of the reports, but have a complete and thorough understanding of where the information came from, how to input the information, and how to do a detailed

analysis of the data that came from the reports. In addition, as the primary trainer for the area in which the Retention Area Manager is assigned they are also responsible to train the Retention and Transition NCOs in their assigned area of operations.

3. Based on this last item, the third and final major finding involved the identification of tasks that would give the Retention Area Manager the tools necessary to identify training needs, develop a training program, design, implement and evaluate a training session. In addition, the Retention Area Manager would also have to be able to assess the abilities, of the NCOs in his or her area, to conduct training sessions for the Duty Appointed Retention NCOs in their assigned units as well as other soldiers in their assigned units. The RTMC Program of Instruction has no critical tasks on training.

<u>Conclusions:</u> The thing that became apparent from the very start, was the need for a course to address the training shortfalls for the new Retention Area Manager. Despite the lack of experience in the U.S. Army Reserve community in the new Retention Area Manager position, a quality product can still be developed for training the new Retention Area Manager's. Although the skills are new and the training focus may be different, still the base retention skills remain the same. To be successful in this effort, the course will need to be developed using the data gleaned from the Task Review/Analysis Board. This is merely the first formative step in fielding a course to train the Retention Area Managers.

From this point the course continues in the development stage, until the Working Program of Instruction is developed and prepared for course design (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). The Working POI will include the following:

1) The new task list as developed during the Task Review/Analysis Board.

2) Each task will also include a Task Learning Analysis Worksheet that directly spells the performance steps for each task, references and related knowledge needed to perform the task.

3) A suggested draft classroom, training schedule that will sequence ach class and begin to refine the classroom instructional time. This will further help identify any equipment and resource needs for each individual class that is to be taught as part of the new course.

4) Finally, the meat of the POI will be the development of Terminal Learning Objectives for the new course. This will enable the instructors and other individuals that will be developing individual lesson plans and supporting material, to understand the "bottom line" criteria, that needs to be taught and subsequently learned by the student. Each terminal learning objective will contain a task or action to be performed, training condition statement and standards that the student must achieve to demonstrate competence.

In addition, to the understanding that the new Retention Area Manager course is a valid training need, it also became apparent through the course of the Task Review/Analysis Board, that the new Retention Area Manager job would be heavily dependant upon numerous automated systems. These systems are all U.S. Army systems, and although they are available at many locations in the U.S. Army that does not mean that they are readily available for the ARRTC to use to train soldiers on during this new course. In fact, although the ARRTC has most of the systems available at the

Fort McCoy site, these systems are already committed to a full training cycle in support of other ARRTC courses.

This brings up the last issue. To support training the new Retention Area Managers on these automated systems, will require the U.S. Army Reserve to “step up” and commit to resource the course in manpower, equipment, time and finances. This could be a significant commitment on the part of the USAR, and should this support not be forthcoming, certainly the ability of the ARRTC to train to a optimal standard may be degraded. It would certainly cause a revision of the POI and terminal learning objectives to change the task training conditions and possible learning competency standards. It does not mean that Retention Area Managers cannot be training adequately, just that they may need to be trained differently.

After the Working POI is published the course then moves into the design phase, where the specifics of the classroom instruction and resource issues will be addressed and worked out (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999). The last part of the design phase will be to test the course in a pilot program. This involves actually fielding the course to a test audience for final refinement and development of course material to include testing procedures and to work out the “bugs” of the automation pieces. Finally the course enters the implementation phase and is fielded to the general USAR Retention community and training of Retention Area Managers begins (ARRTC Regulation 351-1-1, Systems Approach to Training, 1999).

Recommendations Related to the Study

1) Continue the SAT process for the development and implementation of a new Retention Area Manager course based upon the input from the Task Review/Analysis Board.

2) Develop the course so that it is heavy in practical use of automated retention and transition systems. This course should be progressive, so that the students in the later subjects utilize knowledge taught on the front end of the course. This is particularly true for the automated retention systems.

3) After design, development and implementation, ensure that a quality evaluation system is developed and implemented that at a minimum gets immediate feedback from graduating students, post graduate data from graduates and data from supervisors. This will ensure that any course modifications are pertinent, timely and accurate.

4) Continue to develop a course that is heavily dependent upon proper utilization of retention regulations and the TTP manual. It is critical that the Retention and Transition Area Managers understand how to use the appropriate regulations and doctrinal guidance contained in the TTP. They should be taught to go to these documents to ensure accuracy and a quality product, which will better serve both the soldiers in their units and the U.S. Army Reserve.

5) Ensure that the DRAFT TTP manual is refined and published in final form as soon as possible. There is no doubt that future updates of this manual will be necessary, but the importance of having this doctrinal document in print prior to the implementation of the Retention and Transition Area Managers course is vital. This document along with

the retention and transition regulations serve as the basic job aids for all U.S. Army reserve Retention and Transition NCO's and Area Managers.

Recommendations for Further Study. The new Retention Area Manager course will need to be closely monitored and refined through graduate and supervisor surveys as it enters the implementation phase of the process, to ensure that the training needs of the USAR retention community continue to be met. In addition, the Retention and Transition NCO course should also reenter the Analysis Phase for possible redesign and or course update. This is necessary not only due to the fielding of the new Retention Area Manager Course and how this job will relate to the Retention and Transition NCO, but also to address the regulatory guidance coming forth from Department of the Army through OCAR-RTD.

In addition, it may become necessary to take another look at the old RTMC course and determine if there is a training need not being met there. As the old RTMC course goes away and the new Retention Area Manager course is fielded, there is a possible training shortfall for the primary audience the old RTMC was designed to train, the senior Retention and Transition NCOs at the Regional Support Command level and higher. By design these NCOs and officers will not go through the new Retention Area Manager course.

Finally, related to the old RTMC course, the new Retention Area Manager course and the RTNCO course, a training program needs to be developed to allow professional development for the 79V NCOs in the USAR. Currently the U.S. Army professional career development for NCOs starts first the Primary Leadership Development Course (PLDC) for junior soldiers just before or shortly after they attain the rank of E-5 Sergeant. Before they can be promoted in their MOS to the rank of E-6 Staff Sergeant they must attend an MOS specific Basic Noncommissioned Officer Course (BNCOC). Finally, to be promoted to the rank of E-7 Sergeant First Class they must attend an MOS specific Advanced Noncommissioned Officer Course (ANCOC). In each course the level of instruction is related to the soldier particular MOS field, but increasingly taught to an NCO that is expected to serve in the capacity of higher levels of responsibility, leadership and management.

Currently the 79V MOS soldier attends PLDC, and then the RTNCO course, but there is no ANCOC for the 79V MOS. At some point this training shortfall must be addressed. The Retention Area Manager Course is a job specific course, and although related, is probably not a course that can fill this need.

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Appendix A: Task List

Author's note:

Other Appendices containing confidential material could not be included due to their confidential nature.

RETENTION AND TRANSITION AREA MANAGER TASK LIST

ROLES AND RESPONSIBILITIES
Task 1 Determine the Roles and Responsibilities of the Retention Manager
Task 2 Analyze the Role of the Area Manager in the Recruiting Partnership Council (RPC)

LEADERSHIP
Task 3 Identify the Regulatory Requirements for NCOER Counseling
Task 4 Identify NCOER Rater and Senior Rater Qualification Requirements
Task 5 Identify the Regulatory Requirements for the Submission of the NCOER
Task 6 Identify the Types of NCOER Reports That may be Submitted
Task 7 Prepare a Learning Objective
Task 8 Develop a Training Outline
Task 9 Conduct a Training Session
Task 10 Conduct Training Assessment
Task 11 Evaluate a Retention Interview

RETENTION MANAGEMENT
Task 12 Prepare a Time Management Work Plan
Task 13 Determine Equipment Accountability Procedures
Task 14 Determine Maintenance Procedures
Task 15 Determine the Retention Manager's Role in Quality Assurance Visits
Task 16 Identify the Reporting Requirements for the Area Manager

MANAGEMENT SYSTEMS
Task 17 Analyze Reports from the ITRR-GIS System for Retention Activities
Task 18 Analyze Reports from the RAS System for Retention Activities
Task 19 Analyze Reports from the CRRT System for Retention Activities

RETENTION MISSIONS
Task 20 Perform Quality Control Actions for the Warrant Officer Application Process
Task 21 Perform Quality Control Actions for the IRR to TPU Transfer Process
Task 22 Perform Quality Control Actions for the AGR Recruiter Hire Application Process

RETENTION PROCESSING SYSTEMS
Task 23 Analyze Reports from the LEADSOURCE System for Retention Activities
Task 24 Analyze Reports from the DMS via SOLNET for Retention Activities
Task 25 Analyze Reports from the REQUEST System for Retention Activities
Task 26 Analyze Reports from the AORS System for Retention Activities