A NEW SOCIAL COMPACT

A RECIPROCAL PARTNERSHIP BETWEEN THE DEPARTMENT OF DEFENSE, SERVICE MEMBERS AND FAMILIES

JULY 2002

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FOREWORD

April 11, 2002

In one of his first actions as President, George W. Bush firmly asserted his commitment to improving the quality of life for military men and women and their families. Within a month of taking office he issued a National Security Presidential Directive requiring the Secretary of Defense to "undertake a review of measures for improving the quality of life for our military personnel and provide recommendations for their implementation." Action began immediately to improve housing, health care, pay, and to more fully underwrite family support. Secretary Rumsfeld incorporated an extensive review of quality of life in the 2001 Quadrennial Defense Review. Upon completion of the review, the Secretary of Defense reiterated the President's commitment, stating, "the Department must forge a new compact with its warfighters and those who support them—one that honors their service, understands their needs, and encourages them to make national defense a lifelong career."

History reminds us that the American democracy evokes such a "social compact" among its citizens as does service in the military. In 1779, John Adams clearly articulated the first American view of a "social compact" which mirrors the voluntary nature of current military service: *"The body-politic is formed by a voluntary association of individuals. It is a social compact, by which the whole people covenants with each citizen, and each citizen with the whole people, that all shall be governed by certain laws for the common good."*

The demographics of today's military—60 percent of troops with family responsibilities—foster a Social Compact that is truly reciprocal in nature. 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. The military Services and the Office of the Secretary of Defense embarked on a strategic review of Quality of Life services to set the direction for providing support to service members and their families for the next 20 years.

A new Social Compact reconfirms America's commitment to service members, both active and reserve, who serve as a protector and wedge between terror and the security of the American people. The array of quality of life programs covered by the Social Compact recognizes the challenges of military life and the sacrifices service members and their families make in serving of their country.

As we transform the military for the 21st century, the President and the Department of Defense are committed to improving life in the military, to underwrite family support programs, and to work in partnership with families to accomplish the military mission. America's noble warfighters deserve no less.

John M. Molino
Deputy Assistant Secretary of Defense
*(Military Community and Family Policy)*

EXECUTIVE SUMMARY

"No aspect of our current defense posture is more worrisome than the decline in the standard of living of our service members and their families which has taken place in recent years. Reversing this trend and improving their quality of life is a principal priority of my Administration."

—President George W. Bush, February 12, 2001
Fort Stewart, Georgia

This review responds to President George W. Bush's commitment to improve the quality of life for military men and women and their families. Very early in his administration, the President issued a National Security Presidential Directive entitled "Improving Military Quality of Life." This directive required the Secretary of Defense to undertake a review of measures to improve quality of life and to provide recommendations for implementation.   The Secretary of Defense embedded quality of life in the 2001 Quadrennial Defense Review stating, "the Department must forge a new compact with its warfighters and those who support them…" As the military is transformed for the 21st century, the President and the Department of Defense are committed to improve life in the military, to underwrite family support programs, and to work in partnership with families to accomplish the military mission.

To address the myriad challenges of those it serves—over 1.2 million active duty members, their nearly 700,000 spouses, 1.2 million children and 1.3 million Reserve Component members and their families—the Department develops policy and manages a wide variety of quality of life programs. Areas of great importance to all service members—housing, health care, family support networks, and children's education—tend to revolve around their personal lives and families. Not surprisingly, confidence in the quality of personal and family life is a key element of a highly motivated and effective force.
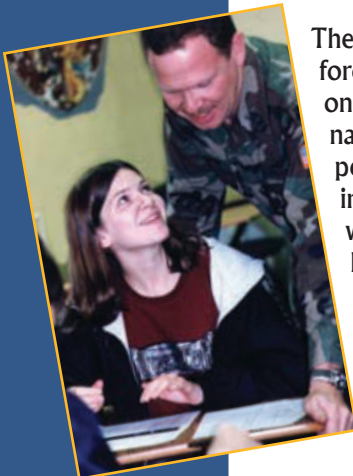
The Department of Defense faces a tremendous challenge in maintaining its force today—in terms of both quality and numbers. The Department relies on a volunteer military, and the men and women who choose to wear our nation's uniform perform truly noble work. However, today more young people are going to college, and competition from the private sector is increasing. Lifestyle values of American workers are also changing. People want more time for themselves and their families, and more time at home. Responding to shifting values among employees and their families, employers have become increasingly family-friendly. Wise employers are selectively adopting new practices to strengthen their relationships with the workers they want to keep. Investment in these approaches makes sense for building morale, efficiency, continuity, and bottom-line strength.

PHILOSOPHY OF A SOCIAL COMPACT

The notion of a Social Compact or the idea that "we're all in this together" is paramount for the provision of a successful military defense. The Social Compact recognizes the fundamental reciprocity exchange that exists between the

From the beginning of this nation, democratic concepts such as the "social compact" have been part of our leaders' philosophy. In 1779, John Adams clearly articulated the first American view of a "social compact" which mirrors the voluntary nature of military service: "The body-politic is formed by a voluntary association of individuals. It is a social compact, by which the whole people covenants with each citizen, and each citizen with the whole people, that all shall be governed by certain laws for the common good."

service member, his/her family and the Department of Defense—the performance of each impacts the quality of each. Since the early 1980's the Department has increasingly expanded support to military families through quality of life programs. Although these services were never formally called a "social compact," service members and their families have grown to appreciate that quality of life issues will be addressed by a caring military leadership. Today, with an all-volunteer force, shrinking infrastructure of bases, increasing reliance on reserves, and perhaps more importantly, wartime mis-

sion demands, the assurance to military families that the Department is prepared to underwrite family support is of primary importance.

WHY CHANGE

Recognizing the changing demographics and expectations of military members and their families and in support of the President's mandate to improve the quality of life of our military personnel, the Department embarked on a far-reaching exploration of the relationships that exist among itself, and its members and their families. Today many of the laws and policies governing the Department's relationship with service members and their families are based on yesterday's paradigms: a force comprising high school graduates with few dual income families and more stay at home spouses. It operated in a less

Community Quality of Life

Personnel and Readiness
Monitoring the Status of the Force

FY 2003 POM (FY2003 = $3.8B)

Community Support...

Constant FY2001 $$

Steady Improvement

$5B
$4B
$3B
$2B
$1B
$B

77 79 81 83 85 87 89 91 93 95 97 99 '01 '03 05 07

- TAP/ RAP
- Child Care
- Family Centers
- Family Advocacy
- Schools (CONUS)
- MWR (AFF)
- Schools (OCONUS)
- Commissaries

Community Support - Per Capita Snapshot (FY01 Constant $$)
- In 1976, DoD spent $1359
- In 2001, DoD spent $2612

complex financial world with more of a "company town" mentality. Access to technology was extremely limited and there was no Internet. Family separations were predictable.

The world has changed and so must the military to keep pace with the emerging US social trends and to meet the expectations of new generations of service members and their families. The Department must address the American higher standard of living—in housing, medical care and education—as well as recognize the needs of dual earner families. Efforts must be directed to reaching the Total Force, which is increasingly diverse, resides primarily off-base, and is challenged by today's complex financial environment. New policies and laws must reflect these changing demographics and the transformation of the military, fostering the tacit agreement that "families also serve."

Purdue University's Military Family Research Institute's paper, Social and Psychological Contracts: Relationships between Workers and Employers in the 20th Century (2001), addresses military changes:

"The relationships between organizations and their members are constantly evolving, continually renegotiated or forced to change by external trends, by changes in the constraints and opportunities of the environment in which the organizations operate, or changes in members themselves. American workplaces, including military organizations, are no exception. In fact, the bargain between the military and its members has often been more explicit than in other employing organizations because of the extensive array of supports required to adequately train and deploy members around the world."

Critical Elements of Military Lifestyle Support
Creating a New "Social Compact"

Education
- Increase service member access to education/maximize distance learning opportunities
- Remove barriers for children moving from school to school.
- Review tuition assistance for spouses.
- Institutionalize financial training for military members and families.

Housing
- Focus base housing resources on most vulnerable families.
- Allow junior personnel to live off base.
- Provide web enabled housing referral for the 2/3rds who live off-base (single & married).
- Establish renovation standards.

Family and Community Support
- Underwrite family support as a government responsibility.
- Improve spouse employment and career development opportunities.
- Address availability of child care and elder care issues.
- Expand fitness and recreational opportunities in line with new generation's aspirations.

Work Life
- Limit moves.
- Reduce stresses on service members and their families (PERSTEMPO).
- Reduce family separation.
- Improve separation predictability.
- Strengthen Reserve forces employer assistance programs

Health
- Create a world class health system.

PROCESS FOR REVIEW OF QUALITY OF LIFE

As a first step, the Department chose to review the critical elements of military lifestyle support. This report documents the comprehensive, integrated approach employed by the Office of the Secretary of Defense in this review and is consistent with the President's mandated review of initiatives designed to improve the quality of life of military personnel.

Over the course of several months, functional area teams—comprised of senior professional staff from the Army, Navy, Air Force and Marine Corps as well as from OSD Housing, Health Affairs, Reserve Affairs and the Unified Combatant Commands— reviewed current quality of life programs to identify strategies for developing and implementing the programs, policies, and services necessary to meet the evolving needs of the 21st century military force. Each team submitted a plan outlining the vision, scope, process, goals, measures and legislative changes for the functional area.

A large body of research documents the impact of health care, housing, child care, family support networks, spouse employment, dependent education, financial stability, voluntary education and consumer services on the resilience of military families. Based on this research, functional areas were identified as being critical components for quality of life programs.

CURRENT SERVICE DELIVERY SYSTEMS AND STRATEGIES

Each of the Military Service branches currently has activities that are consistent with elements of the Social Compact. Many of these initiatives and activities were in place prior to this review—a clear indication of each Service's ongoing concern with family support and well-being and the broad-based response as a result of those concerns. Service specific quality of life, well-being, and community capacity

A NEW SOCIAL COMPACT
GOALS - A 20 Year Strategy

★ World Class Heath Care
- Promote personal responsibility for health through preventive care.
  - Meet beneficiaries expectations for access and quality.
  - Strengthen TriCare management system.

★ Education
- Actively support Service Members and families desire for education.
  - Tuition assistance
  - Dependent schools
  - Barriers to dependent education.

★ Quality Housing
- Housing that meets Service Members' and families needs.
  - Leverage partnerships with civilian communities.
  - Improve access for 2/3rds living off base.
  - Ensure allowances do not require out-of-pocket costs.

★ Work Life Stress
- Respond to Service Members and families rising work life stress:
  - Grow child care
  - Increase spouse employment
  - Campaign for financial literacy
  - Construct and replace substandard fitness facilities.

★ Underwrite Family Support
- Polices and laws that underwrite support to families.
- 24/7 support.

★ Communication with Families
- Improve access to Internet and connectivity for QoL services.

★ Strength Employer Support
- Reserve Component.

The Social Compact promotes the advancement of the military community through the **reciprocal ties** that bind service members, the military mission and military families by responding to their quality of life needs as individuals and as members of a larger community.
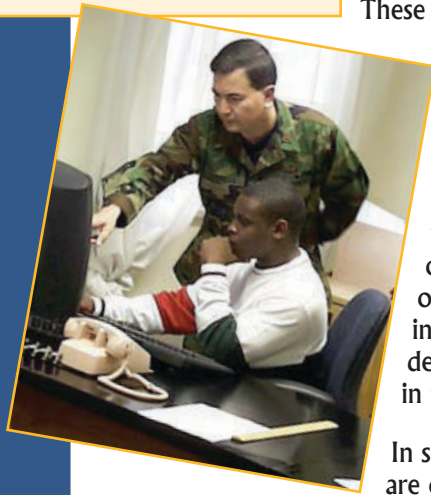
building initiatives provide a sense of program direction. Specific delivery strategies such as "Army Knowledge Online," "Navy LIFELines," "Air Force Crossroads," and "LIFEWorks," reveal the breadth of support for personnel, families, and others connected with the military community.

These initiatives demonstrate the Services' recognition of the strategic value in addressing the nexus of work life and personal/family life, as it affects key organizational goals related to recruitment, retention, morale, and mission readiness. The Services have also recognized that quality of life is determined both by what an organization does and by what people do for themselves in concert with that organization. Finally, it is important to note that not only have the Services been moving toward integrating programs internal to the military, but have been developing partnerships with agencies and organizations in the civilian community as well.

In sum, these responses to individual and family issues are consistent with the Social Compact philosophy and its goals, illustrating that there are already numerous activities supporting functional areas that comprise this Social Compact initiative. These current activities provide a solid and productive base upon which to build the Social Compact in a more intentional and concerted manner.

THE FUTURE—A NEW SOCIAL COMPACT

The partnership between the American people and the noble warfighters and their families is built on a tacit agreement that families as well as the service member contribute immeasurably to the readiness and strength of the American military. Efforts toward improved quality of life, while made out of genuine respect and concern for service members and families needs, also have a pragmatic goal: a United States that is militarily strong.

This report implements the President's directive to review measures for improving the quality of life of military personnel and provides recommendations for implementation. It clearly articulates a caring leadership who understands the sacrifices and demands of the military lifestyle. It reiterates the Department's commitment to underwrite family support. It acknowledges the reciprocal nature of military service among the service member and the family and the Department. It provides a road map for the change needed to support the transformation of the military to the 21st century. It is a long-term quality of life strategy for the Department.

I. INTRODUCTION

BACKGROUND

On February 15, 2001, in his second National Security Presidential Directive, "Improving Military Quality of Life," President Bush directed the Secretary of Defense to "undertake a review of measures for improving the quality of life for our military personnel and provide recommendations for their implementation." Secretary Rumsfeld, upon his appointment in January 2001 to the position of Secretary of Defense, directed an across-the-board review of quality of life and morale issues. This review, "Morale and Quality of Life," conducted by the RAND Institute, acknowledged that past paradigms no longer address today's problems, much less requirements of the future. The study recommended the Department develop a new human resource strategy. Furthermore, the 2001 Qua-

> *"We owe you and your families a decent quality of life."*
>
> —President George W. Bush, February 12, 2001
> Fort Stewart, Georgia

drennial Defense Review stated, "...the Department must forge a new compact with its warfighters and those who support them."

In August 2001, the Deputy Assistant Secretary of Defense, Military Community and Family Policy, and the RAND Institute co-hosted a "Quality of Life Symposium." Its purpose was to examine the civilian literature on quality of life. In prior research on military

Satisfaction & Intent to Stay

Service Member vs Spouse Opinion

Satisfaction — Active Duty: 50%, Spouse: 56.2%
Intent to Stay — Active Duty: 57.0%, Spouse: 58.8%
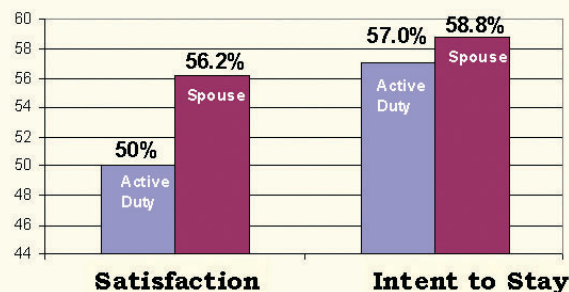
If future assignment causes frequent separations, spouse support to stay drops to 28.4%

1999 ADS (Member) Q
1999 ADS (Spouse) Q 27

> "You can ask people to leave their personal lives at the factory fence—in the old days, that was the culture of most corporations but you're just kidding yourself if you think they can comply. You can't hire part of a person. You get the sore back along with the skillful hands. You get the anxious heart along with the educated brain. So, your policies and programs will only be effective if they bow to this reality and address the whole human being. The bottom line is that our efforts to support employees' work-family priorities are good business. These are neither 'perks' nor 'giveaways.' These tools will help us attract, motivate, and retain people who are more likely to be more dedicated, more focused, more innovative, and more productive."
>
> *—Randall Tobias when he led Eli Lilly and Company.*

quality of life, RAND found considerable diversity in the approaches the Services have chosen to take, including variances in resources, strengths, and goals. The symposium highlighted a similar variety in ideas and approaches taken by the civilian sector as well.

In fall 2001, in preparation for development of a new Social Compact with military families, the Department's Office of Military Community and Family Policy hosted a seminar conducted by the Military Family Research Institute at Purdue University on "Social and Psychological Contracts: Relationships between Workers and Employers in the 20th Century". This seminar highlighted the emerging focus and the importance of a "social compact" between employers and employees. Employment trends over the last century have formed a completely different workplace than existed a hundred years ago. Rising expectations and national economic affluence, particularly in the last decade, have changed the American workforce's attitudes. This seminar emphasized that the surest way for an organization to successfully transition to a new Social Compact is to maintain programs and services viewed as benefits by employees.
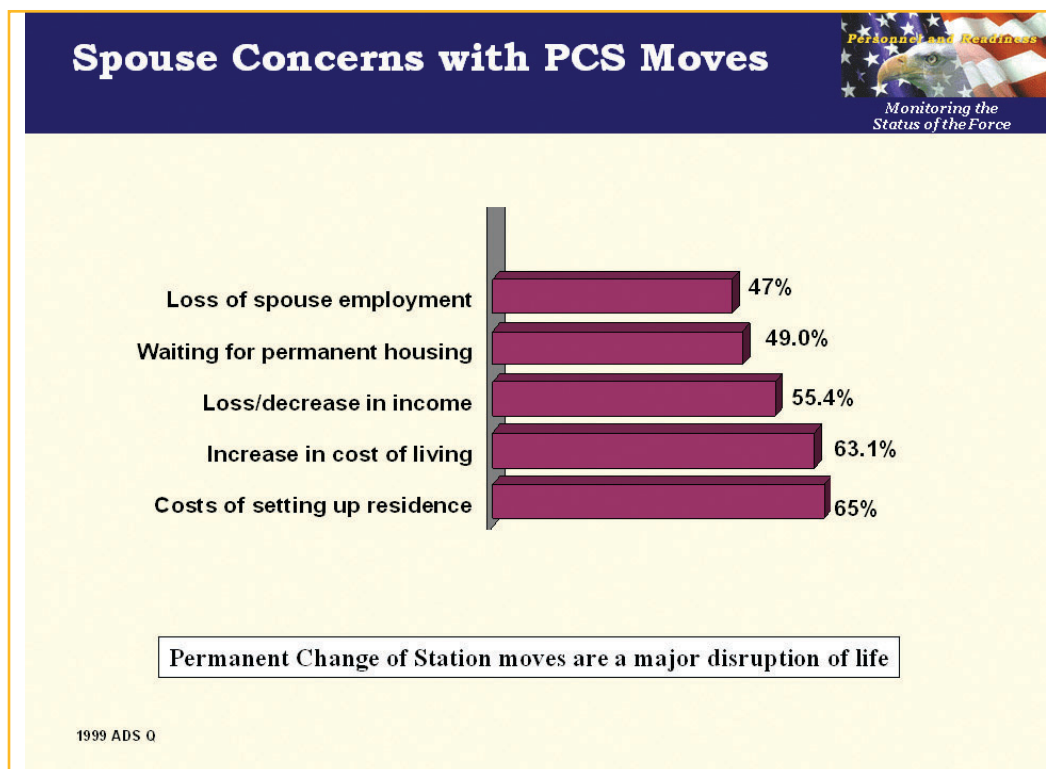
DoD faces a tremendous challenge in maintaining its force today—in terms of both quality and numbers. The Department of Defense relies on a volunteer military; and the men and women who wear our nation's uniform perform truly noble work. Recruiting, training, and retaining personnel are essential to building and sustaining the Department's highly skilled workforce. More young people are going to college, and competition from the private sector is increasing. Lifestyle values of American workers from which the Department draws are changing. People want more time for themselves and their families. They want more time at home. Responding to shifting values among employees and their families, employers have become increasingly family-friendly. Wise employers are selectively adopting new practices to strengthen their relationships with the workers they want to keep. Investment in these approaches makes sense for morale, efficiency, continuity, and bottom-line strength.

The Department of Defense has recognized the substantial challenge of managing emerging family issues for the Total Force. Much has been done to try to manage service members' time away from home by making separations (e.g., deployment, training missions) more predictable and of a predictable duration. The return for providing service members and their families with consistent, high quality benefits that meet their needs is a committed, long-term workforce.

To address the myriad challenges of those it serves—over 1.3 million active duty members, their nearly 700,000 spouses, 1.2 million children and 1.5

Spouse Concerns with PCS Moves

Monitoring the Status of the Force

Concern	Percent
Loss of spouse employment	47%
Waiting for permanent housing	49.0%
Loss/decrease in income	55.4%
Increase in cost of living	63.1%
Costs of setting up residence	65%

Permanent Change of Station moves are a major disruption of life

1999 ADS Q

million Reserve Component members and their families—the Department develops policy and manages a wide variety of quality of life programs. This report documents the comprehensive, integrated approach employed by the Office of the Secretary of Defense to fulfill the President's mandate to review initiatives designed to improve the quality of life of military personnel. Areas of great importance to all service members—housing, health care, family support networks, and children's education—tend to revolve around their personal lives and families.

MILITARY LIFESTYLE— SIGNALING A NEED FOR CHANGE

Military service is not just a job—it is a voluntary way of life. This commitment carries a high price for both the service member and his or her family. Frequent deployments, long separations, recurrent moves, inconsistent housing, and transient spousal employment are just a few of the unique hardships consistently faced by the families of those in uniform.

Life in a military family presents unique challenges. Whether relocating to other cities or countries, experiencing separations when military members deploy, or making the transition to civilian life after service, military families face many challenges that

generate stress, anxiety, and uncertainty. Factor into these the various personal and financial challenges likely to confront any family, and it becomes easy to understand why support for military families is so important.

In addition to military-specific hardships, service members and their families also share stressors with their non-military counterparts. The increase in the number of dual-income families is an example of one such commonality. Like many of their civilian
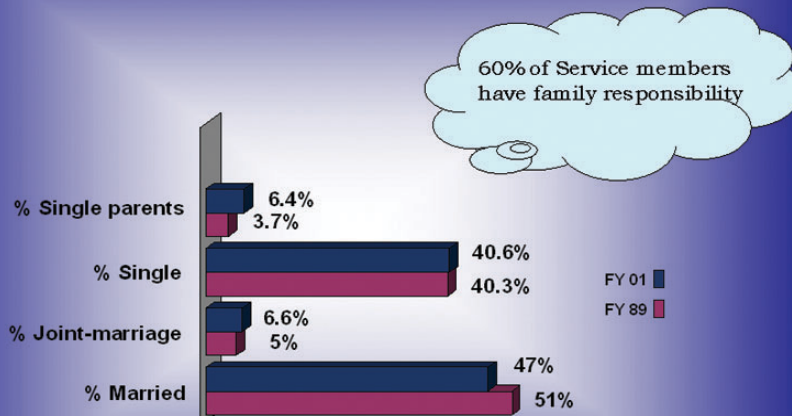
Sixty percent of Service Members have family responsibilities.
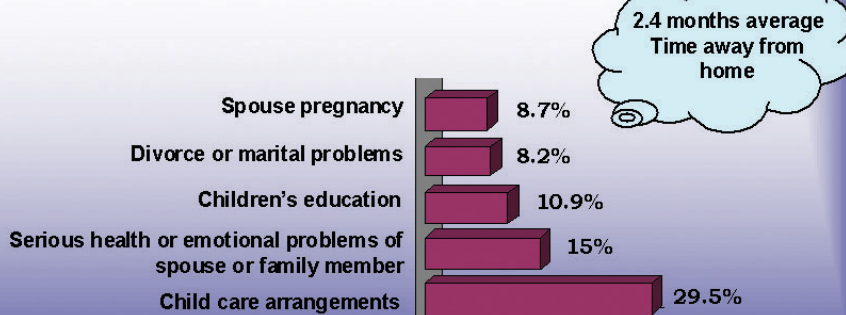
Military spouses in the labor force report that the family's second income is necessary to cover basic family expenses. Most significant, perhaps, is the fact that fully *29.5 percent* of military spouses identify child care as their top problem. Such information, yielded by the responses to surveys, validates the dedication of the President and the Department of Defense to improving Service Members' quality of life.

Changing Expectations Create Need for a New "Social Compact" with Our Military Families

Today's laws and policies based on yesterday's environment...

★ High School force
★ Family separations acceptable
★ Few dual career families and more stay at home spouses
★ No Internet
★ Less complex financial world
★ "Company town" mentality

Tomorrow's laws and policies must...

★ Keep pace with emerging US social trends
★ Meet expectations of new generations
★ Address American higher standard of living – housing, medical care and education
★ Recognize needs of dual career families and increased diversity
★ Operate in complex financial environments
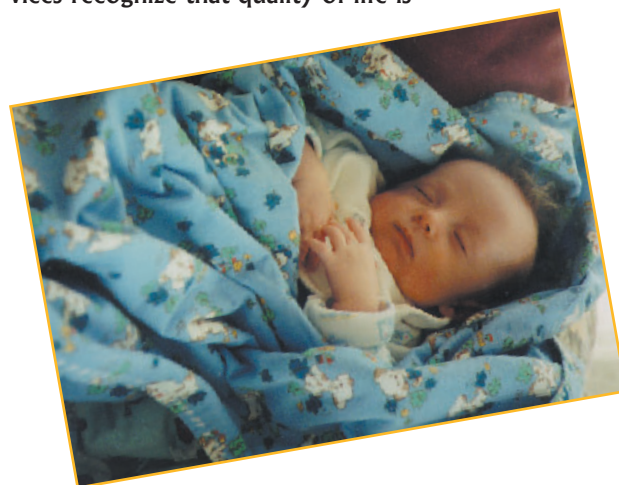★ Reach the Total Force -- primarily off-base

counterparts, military spouses in the labor force report that the family's second income is necessary to cover basic family expenses. When both spouses work, child care outside the home can become an important consideration—especially since extended family support can be several states away, if not overseas. Dual income couples quickly find that job responsibilities and home responsibilities are frequently at odds. The challenge of balancing work and home life can be particularly difficult when one spouse is deployed for long periods of time.

PARTNERSHIP BETWEEN FAMILIES AND THE DEPARTMENT OF DEFENSE

The Department of Defense has long recognized that service to the country extracts a heavy demand on families and that support to military families can be accomplished in a variety of ways. In 1983, the Army published a White Paper regarding the partnership between Army families and the Army. In the introduction, General John A. Wickham, then Chief of Staff of the Army stated, "A partnership exists between the Army and Army Families.... Towards the goal of building a strong partnership, the Army remains committed

to assuring adequate support to families in order to promote wellness; to develop a sense of community; and to strengthen the mutually reinforcing bonds between the Army and its families."

Now, almost twenty years later, the Department has a wide range of quality of life policies, services, and programs to address personal and family issues. Each Service has initiatives that address the nexus of work life and personal/family life; all are concerned with key organizational goals related to recruitment, retention, morale, and mission readiness. The Services recognize that quality of life is

Critical Elements of Military Lifestyle Support
Creating a New "Social Compact"

Education
• Increase service member access to education/maximize distance learning opportunities
• Remove barriers for children moving from school to school.
• Review tuition assistance for spouses.
• Institutionalize financial training for military members and families.

Housing
• Focus base housing resources on most vulnerable families.
• Allow junior personnel to live off base.
• Provide web enabled housing referral for the 2/3rds who live off-base (single & married).
• Establish renovation standards.

Family and Community Support
• Underwrite family support as a government responsibility.
• Improve spouse employment and career development opportunities.
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• Expand fitness and recreational opportunities in line with new generation's aspirations.

Work Life
• Limit moves.
• Reduce stresses on service members and their families (PERSTEMPO).
• Reduce family separation.
• Improve separation predictability.
• Strengthen Reserve forces employer assistance programs

Health
• Create a world class health system.

determined both by what an organization does and by what an individual does for oneself in concert with that organization.

RECOGNIZING THE NEW "SOCIAL COMPACT"

The relationships between an organization and its members are constantly evolving, and continually being renegotiated or forced to change by external trends, changes in the environment or changes in the members themselves. Military organizations are no exception. In fact, the bargain between the military and its service members has often been more explicit than in other organizations in America because of the extensive array of support systems required to adequately train and deploy members around the world.

The notion of a Social Compact or the idea that "we're all in this together," is paramount to a successful military defense. The Social Compact recognizes the fundamental three-way exchange that exists between the Service Member, the family and the Department of Defense. Since the early 1980's the Department of Defense has increasingly expanded program support to military families. Although these services were never formally called a "social compact," service members and their families have grown to appreciate that family and quality of life issues will be addressed by a military leadership that cares.

Today, with an all-volunteer force, shrinking infrastructure of bases, increasing reliance on Reserves, and changing mission demands, the Department envisions a new Social Compact between the military and its members and their families. The new
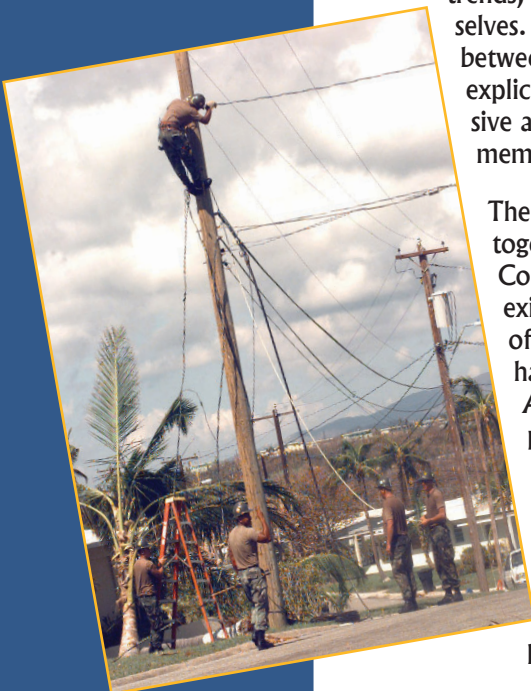
Social Compact explicitly recognizes that military service is a reciprocal partnership between the Department of Defense, service members and their families. Of primary importance to military families is the assurance that the Department is prepared to underwrite family support.

PURPOSE OF THIS REPORT

As the first step in the process of forging this new Social Compact, the Department chose to review the critical elements of military lifestyle support. This report documents the comprehensive, integrated approach employed by the Office of the Secretary of Defense in this review. This process is also consistent with the President's mandated review of initiatives designed to improve the quality of life of military personnel.

A large body of research documents the impact of health care, housing, child care, family support networks, spouse employment, dependent education, financial stability, voluntary education and consumer services on military families' resilience. Based on this research, functional areas were identified as being critical components for quality of life programs. It is important to recognize that the mix of appropriate programs may vary between Services and localities.

Over the course of several months, functional area teams—comprised of staff from the Army, Navy, Air Force, and Marine Corps as well as senior professional staff from OSD Housing, Health Affairs, Reserve Affairs and the Unified Combatant Commands—reviewed current quality of life programs to identify strategies for developing and implementing the programs, policies, and services necessary to meet the evolving needs of the 21st century military force. Each team submitted a plan that outlined the vision, scope, process, goals, measures and legislative changes for the functional area.

The functional teams addressed the following questions in accomplishing their task:

How will you address PersTempo and family separations?

How are you keeping pace with emerging U.S. social trends?

How will you meet expectations of new generations of young people (vs. Americas' focus on the "boomer" generation)?

How will you address American's increasing higher standard of living?

How will you recognize the needs of dual career families and increased diversity?

How will you address the complex financial environment in America?

How will you reach the Total Force?

How will you reach the off-base population?

How can you deliver services through the Internet?

ORGANIZATION OF THIS REPORT

Chapter II presents the results of the reviews undertaken by the functional area teams. This includes their vision, scope, process, goals, measures and required legislative changes. Together these form the strategic plan for service delivery systems and strategies.

Chapter III provides a review of the informational systems and strategies underwriting family support and quality of life currently provided by the Services. In recognition of the challenges and support unique to each Service, this review includes information about each Service's philosophy about their Social Compact with service members as well as specific examples of delivery systems.

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II. FUNCTIONAL AREAS OF REVIEW

This chapter presents the work of staff from the Army, Navy, Air Force and U.S. Marine Corps, as well as OSD staff from Housing, Health Affairs, Reserve Affairs, Personnel Readiness and the Unified Combatant Commands. Working in 15 functional area teams with senior professional representation from all components, each team proposed a strategy to evolve programs, policies, and services to meet the needs of the transformed 21st century military force.

Fifteen family support and QoL program areas that DoD is committed to supporting and have the greatest potential to increase quality of life for military families were identified. These areas are also consistent with those identified through grass-roots level processes at the installation level. A brief description of each functional area is provided below.

★ **Assistance with Work Life Stress.** Provision of both formal and informal support systems to help service members cope with the unique stressors of military life (e.g. deployment, relocation)

★ **Mobile Military Child Education.** Provision of information and support for military dependent youth as they transition to new schools during relocations

★ **Child and Youth Services.** Provision of affordable, quality child care and youth programs located on military installations

★ **New Parent Support Team.** Provision of home visiting services to every active duty family with preschool children.

★ **Commissary and Exchange Benefit.** Provision of quality services, products, and food at reduced prices to military personnel around the world

★ **DoD Education Activity.** Provision of high quality educational opportunities for military dependent youth that are consistent with high school and college standards

★ **Financial Literacy.** Provision of educational and support services that promote responsible financial behavior in service members and their families

Changing Expectations Create Need for a New "Social Compact" with Our Military Families

Today's laws and policies based on yesterday's environment...
★ High School force
★ Family separations acceptable
★ Few dual career families and more stay at home spouses
★ No Internet
★ Less complex financial world
★ "Company town" mentality

Tomorrow's laws and policies must...
★ Keep pace with emerging US social trends
★ Meet expectations of new generations
★ Address American higher standard of living – housing, medical care and education
★ Recognize needs of dual career families and increased diversity
★ Operate in complex financial environments
★ Reach the Total Force -- primarily off-base

★ **World Class Health Care.** Provision of quality health care to active duty service members, reservists, retirees and their families

★ **Housing.** Provision of information about quality private sector housing or military housing accessible to relocating military families

★ **Fitness and Recreational Opportunities.** Provision of center-based quality health and fitness programs and center-based or installation-wide quality recreational programs

★ **Employer Support for Reserve Forces.** Provision of information to employers to help them understand and support the Reservist

★ **Spouse Employment.** Provision of programs and placement services for relocating military spouses

★ **Technology and Connectivity.** Provision of QoL program and service information via the Internet

★ **Tuition Assistance and Distance Learning.** Provision of tuition reimbursement and distance learning opportunities for military members who want to pursue higher education

★ **Underwriting Family Support.** Provision of DoD policies that support the identified functional areas.

Educational programs and services currently exist in each of the listed functional areas. Unfortunately, these services and programs are inconsistent at both the Service and installation level; this leads to unpredictable services for service members and their families. Additionally, prior to this review process, the services and programs represented by the 15 functional areas had not been reexamined in the context of the transformed military of the 21st Century.

The plans that follow represent each team's review of their functional area and their strategies for meeting the needs of an evolving and transformed workforce. Each functional area section contains the following sections:

★ **Vision and Scope.** This section contains the functional area team's current assessment of the issues related to their particular topic and their vision of what tomorrow's programs, policies and procedures must to do meet the needs of a transformed workforce.

★ **Process.** This section describes the process each team used to derive their recommendations.

★ **Goals.** This section contains a list of the concrete goals and the short-term, mid-term and long-term milestones needed to accomplish the goals and achieve the vision.

★ **Supporting Research.** This section contains a list of relevant research that supports the cited goals and recommendations.

★ **Metrics.** When applicable, this section lists specific metrics or ways of measuring progress toward the cited goals.

★ **Current Policies.** This identifies the current legislative policies that could apply to the specific functional area. Because some policies cross functional areas, the entire policy data base can be keyword-searched and will be accessible on the Internet at mfrc.calib.com.

★ **Required Policy Changes.** When applicable, this section lists suggestions for policy changes that would support the stated vision.

1. ASSISTANCE WITH WORK LIFE STRESS

1.1 VISION

To build and sustain an environment that creates opportunities for individuals, families, and communities that increase their capacity to care for themselves and mutually support one another.

1.2 SCOPE

The focus of this functional area is on building supportive communities through formal and informal organizations that provide assistance with the unique stress factors of Military life.

1.3 PROCESS

The Assistance with Work Life Stress team addressed three specific functional areas of family support services:

★ Information and referral

★ Relocation assistance and process

★ Deployment support.
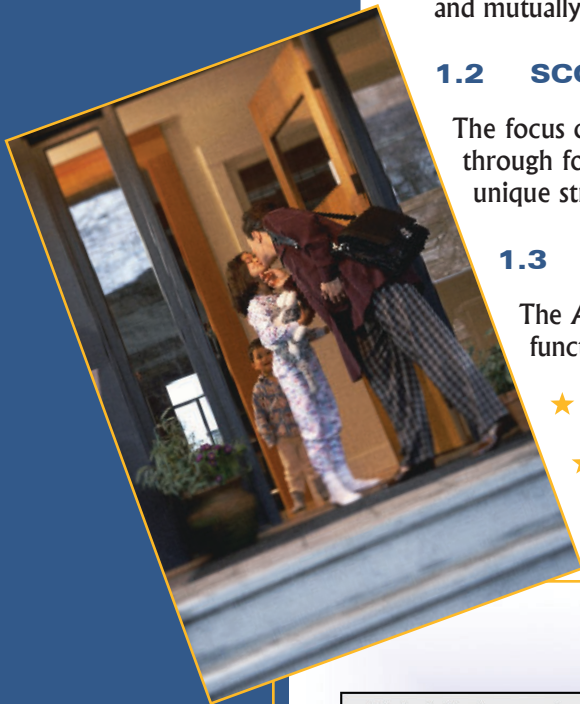
Today's Environment...

•Increasing number of service members with family responsibility.

•Current support programs not designed to reach the 66% of active duty families living off base.

• Reserve, Guard, and independent duty families have little access to on-base support agencies.

• Family Support agencies are spread too thin.

• Needs and demographics of the Total Force are changing (e.g., more spouses working, more Reservists/Guards called to active duty).

•Reliance on volunteers to implement critical support programs.

• Internet not maximized to deliver services to families.

• Emerging global realities have created new and dynamic family stressors.

• Too few work life stress experts inside DoD.

Tomorrow's Programs, Policies and Procedures Must...

▪ Focus family support systems on building strong, cohesive communities.

▪ Provide real-time information and referral to on-base families, the 66% of active duty members living off base and Reserve Component families.

▪ Create strategies that capitalize on dynamic, flexible and elastic support to families.

▪ Invest in new concepts to maximize new methods of service delivery to the 2/3rds of active families and RC families living off base.

▪ Reduce the stress of frequent moves and reduce the complexity of relocation process.

▪ Rely more on transactional automated solutions supported by personal service and assistance.

These areas, which were not addressed by other functional area teams, are important work life stress factors.

The team also addressed community building and reached strong consensus that the factors contributing to robust informal support networks need to be identified. In addition, formal institutions must focus on facilitating such networks and encouraging community bonds.

Promote and sustain partnerships and networks on and off base.

★ Maintain systemic processes to mentor community leaders.

Goal 2. Improve communication linkages, and provide validated information that promotes self-reliance and mutual support at all levels of community:

"Work Life Stress"

VISION: Build and sustain an environment that creates opportunities for individuals, families and communities to increase their capacity to care for themselves and mutually support one another.

ISSUE: The military mission and lifestyle (e.g., per stempo, frequent family separations and relocations) exacerbates normal family work life stressors. Formal institutions alone cannot ameliorate these stressors.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Foster sense of community that prevents unnecessary stress and increases ability to cope with unavoidable stress.	• Identify work life needs and existing metrics. • Connect formal and informal community support structures - correct systemic deficiencies. • Refocus formal support on outreach, community building, and targeted direct services.	• Promote and sustain partnerships and networks on and off-base.	• Maintain systemic processes to mentor community leaders.
2. Improve communication linkages and provide validated information that promotes self-reliance and mutual support at all levels of community.	• Provide 1-800 and Internet access for information and referral. • Establish communication plans for all new policies. • Encourage web-based strategies.	• Provide consumer-friendly methods with fewer gateways to single source information. • Expand access to "high touch" services through technology (e.g., on-line counseling).	• Leverage technological advances to meet communication goals.
3. Ensure service and family members understand the implications of military service.	• Increase awareness of mission requirements with straight talk. • Promote understanding of the Total Force.	• Instill in the culture that military families must expect the unexpected.	• Determine what coping skills best help service members and families adapt to the demands of the military lifestyle and cultivate those skills in the Total Force.

1.4   GOALS

The team developed five goals and associated milestones to ensure that the vision for Assistance with Work Life Stress becomes a reality.

Goal 1. Foster a sense of community that prevents unnecessary stress and increases ability to cope with unavoidable stress:

★ Identify work life needs.

★ Connect formal and informal structures of community support, and correct deficiencies.

★ Refocus formal support on outreach, community building, and targeted direct services.

★ Provide 1-800 and Internet access for information and referral.

★ Establish communication plans for all new policies.

★ Encourage Web-based strategies.

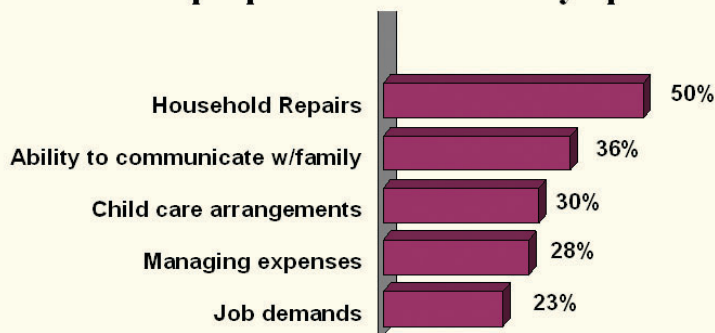★ Provide consumer-friendly methods with fewer gateways to single-source information.

★ Expand access to "high touch" services (e.g., on-line counseling) through technology.

★ Leverage technological advances to meet communication goals

Top 5 problems identified by Spouses

Household Repairs	50%
Ability to communicate w/family	36%
Child care arrangements	30%
Managing expenses	28%
Job demands	23%

Goal 3. Ensure service members and their families understand the implications of military service.

★ Use straight talk to increase awareness of mission requirements.

★ Promote understanding of the Total Force.

★ Instill in the culture that military families must expect the unexpected. Determine what coping skills best help service members and families adapt to the demands of the military lifestyle and cultivate those skills with the Total Force.

Goal 4. Reduce the stress factors associated with relocation.

"Work Life Stress"

VISION: Build and sustain an environment that creates opportunities for individuals, families and communities to increase their capacity to care for themselves and mutually support one another.

ISSUE: The military mission and lifestyle (e.g., opstempo, frequent family separations and relocations) exacerbates normal family work life stressors. Formal institutions alone cannot ameliorate these stressors.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
4. Reduce stressors associated with relocation.	• Overhaul SITES database and begin move from informational to transactional web site. • Simplify relocation and improve quality of service. • Lengthen tours. • Provide full reimbursement of relocation expenses. • Make all assignments pin-point assignments.	• Reduce career barriers and penalties for "homesteading". • Break special interest barriers and provide same level of professional relocation service now enjoyed by the rest of the Federal government. • DoD relocation system will be fully transactional on line.	• DoD will provide quality professional services for all moves.
5. Reduce work life stressors related to family separations.	• Family support programs will focus on community development tasks that foster informal community networks. • Implement communication systems between service members and families such as: email, telephone cards, video-teleconference.	• Education and policies to ensure Family Readiness will be institutionalized. • Each community will have have established partnerships with national and local organizations for support of the Total Force.	• Screening systems will identify in advance families who need education and assistance to prepare for family separations.

★ Overhaul the SITES database, and begin to move from the informational to the transactional Web site.

★ Simplify relocation, and improve quality of service.

★ Lengthen tours.

★ Provide full reimbursement of relocation expenses.

★ Make all assignments pinpoint assignments. Reduce the career barriers and penalties associated with "homesteading."

★ Break special interest barriers, and provide service members and their families with the same level of professional relocation services now enjoyed by the rest of the Federal government.

★ Make the DoD relocation system fully transactional on-line. Provide quality professional services for all moves.

Goal 5. Reduce the work life stress factors associated with family separations:

★ Focus family support programs on community development tasks that foster informal community networks.

★ Implement communication systems between service members and families during separations.

★ Institutionalize family readiness through policies and education.

★ Use screening systems to identify in advance families that need education and assistance to prepare for separations.

ASSISTANCE WITH WORK LIFE STRESS TEAM MEMBERS

– Team Leader: Anne Tarzier, Meg Falk OSD (MC&FP)
– Army: Rex Becker
– Navy: Bill Coffin
– Air Force: Maj Jay Doherty
– JCS: LtCol Mike Hayden
– OSD(RA): Maj Ian Ferguson, Col Steve Fisher
– USMC: Lt Nisha Robbins, CAPT Chris Reite, Brian Goodson
– NMFA: Ms. Joyce Raezer

1.5   SUPPORTING RESEARCH

The goals in the work life stress area emphasize the improvement of work conditions (Goal 4), increasing the support of military members and their families and increasing their access to that support (Goals 2, 4, and 5), and improving the fit between service members' characteristics and the demands of military service (Goal #3). Two recent comprehensive reviews of the work-family literature are probably the best summaries of relevant research:

Haas, L. (1999). "Families and work." In M. B. Sussman, S. K. Steinmetz, & G. W. Peterson (Eds.), Handbook of Marriage and the Family 2nd Ed. (pp. 571-612). New York, NY: Plenum.

Perry-Jenkins, M., Repetti, R., & Crouter, A. C. (2000). "Work and family in the 1990s." Journal of Marriage and the Family, 62, 981-998.

The first review summarizes research demonstrating the importance of supervisor support and improvement of job conditions for improving worker well-being. In addition, this review describes the results of research studying the counseling and educational programs employers have implemented.

The second review also focuses heavily on the quality of work conditions, including reasonable demands, opportunities for workers to exercise self-direction, and the avoidance of chronic stress arising from feelings of tension or conflict between work and non-work responsibilities. This review also emphasizes the importance of high quality child care and supervision for worker well-being.

1.6   MEASURES

In the area of work life stress and community development, there are established metrics in the literature and in practice. It is also possible to apply established metrics in the areas of information and referral, relocation assistance, and deployment support. Examples include measuring:

★   Retention intent before and after a Permanent Change of Station among families that had professional relocation assistance throughout the process and those that did not

★   Retention intent before and after major deployments

★   Percentage of families who report being able to obtain information/ assistance at the time help was needed without traveling to an installation.

★   Number of Family Centers meeting service standards.

★   Family support needs assessments, service usage level and satisfaction.

★   Budget allocation and execution.

1.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to Family Services.

1.8 LEGISLATIVE CHANGES REQUIRED

None identified.

2. MOBILE MILITARY CHILD EDUCATION

2.1 VISION

Children of military families will have seamless educational transfers regardless of where they are relocated. At installations where appropriate, transfers will be facilitated and supported by a funded position whose primary duty is school liaison officer.

2.2 SCOPE

Frequent moves affect the educational success of children of military families.
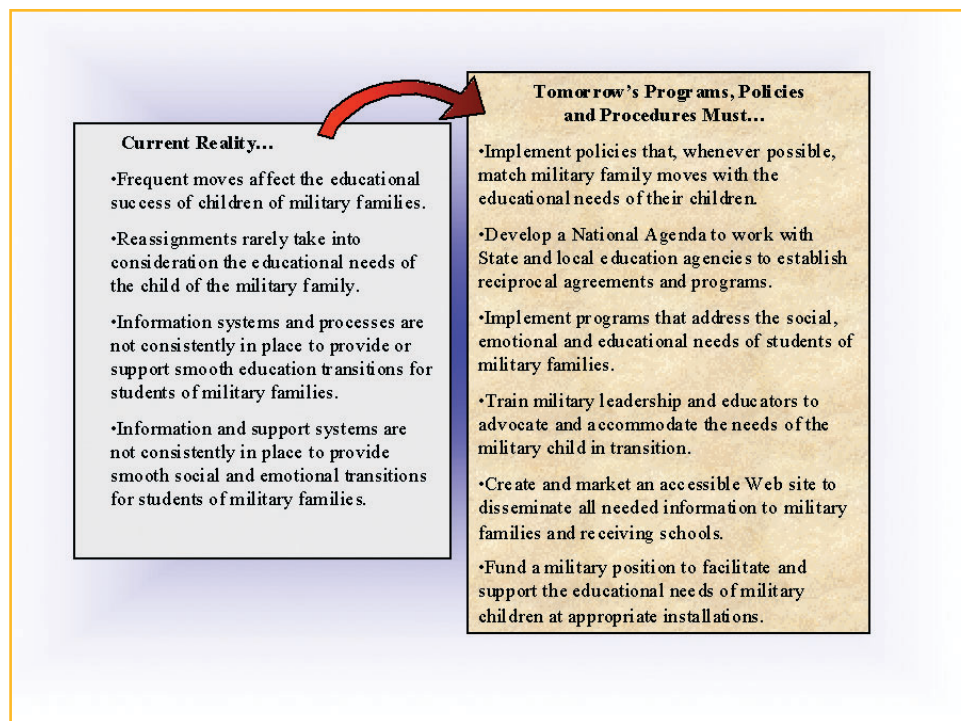
2.3 PROCESS

Team members reviewed the research regarding educational issues of the mobile military child. Each Service prioritized the issues according to the needs of their service members. Through group consensus, three primary issues were selected and translated into the goals listed below. Concomitant solutions were chosen from among existing successful programs and reinforced by new procedures and policies when necessary.

2.4 GOALS

The team developed three goals to achieve in making the Mobile Military Child Education vision a reality.

Goal 1. Reassignments consider the educational needs of the child of the military family. Sample Solutions: Trained placement personnel implement policies that match family moves with the child's educational needs. Using the Military Family Profile

Current Reality...

•Frequent moves affect the educational success of children of military families.

•Reassignments rarely take into consideration the educational needs of the child of the military family.

•Information systems and processes are not consistently in place to provide or support smooth education transitions for students of military families.

•Information and support systems are not consistently in place to provide smooth social and emotional transitions for students of military families.

Tomorrow's Programs, Policies and Procedures Must...

•Implement policies that, whenever possible, match military family moves with the educational needs of their children.

•Develop a National Agenda to work with State and local education agencies to establish reciprocal agreements and programs.

•Implement programs that address the social, emotional and educational needs of students of military families.

•Train military leadership and educators to advocate and accommodate the needs of the military child in transition.

•Create and market an accessible Web site to disseminate all needed information to military families and receiving schools.

•Fund a military position to facilitate and support the educational needs of military children at appropriate installations.

and the Educational Opportunities Information Web site, an accurate, meaningful placement is selected for the child as well as the service member.

Goal 2. Information systems and processes are consistently in place to provide/support smooth education transitions for students of military families. Sample Solutions: State and local-level reciprocity, special education waivers, electronic transfer of records including "Smart Cards" for student data, memorandums of agreement (MOU) between military installations and school districts, and advocacy training for military leaders, parents and school personnel combine to promote a logistically positive transition.

Goal 3. Information and support systems to provide smooth social and emotional transitions for students of military families are consistently in place. Sample Solutions: Youth sponsorship programs, National Best Practices promoted worldwide on the Web, educator awareness training, local partnerships,
transition counselor training, and student-centered educational opportunities Web site work together to provide the safety nets that support the emotional needs of students in transition.

2.5 SUPPORTING RESEARCH

Hix, W. M., Shukiar, H. J., Herbert, J., Hanley, J. M. Kaplan, R. J. & Kawata, J. H. (1998). "Personnel turbulence: The policy determinants of permanent change station moves." (Contract No. DASW01-96-c-0004).

Humke, C. & Schaefer, C. (1995). "Relocation: A review of the effects of residential mobility on children and adolescents." Psychology: A Quarterly Journal of Human Behavior, 32, 16-24.

Marchant. K. H. & Medway, F. J. (1987). "Adjustment and achievement associated with mobility in military families." Psychology in the Schools, 24, 289-294.

Tucker, C. J., Marx, J. & Long, L. (1998). "Moving on: Residential mobility and children's school lives." Sociology of Education, 71, 111-129.

Wood, D., Halfon, N., Scarlata, D., Newacheck, P. & Nessim, S. (1993). "Impact of family relocation on children's growth, development, school function, and behavior." Journal of the American Medical Association, 270, 1334-1338.

Additional research includes:

★ DoD regional roundtable discussions with military installations and impacted school districts in Texas, Georgia, and California

CHECKLIST

Parent/Guardian:
☐ Student's Birth Certificate
☐ Student's Social Security Number
☐ Student's Health Record (Immunization, etc.)
☐ Legal Documents (Court Custody Papers, etc.)
☐ Proof of Residency/Military Orders

Counselor:
☐ Course Description Book/Grading Scale (If available for 6th grade and above.)
☐ Copy of the Cover of Each Textbook
☐ School Profile/Handbook
☐ School Web Page (URL)

Records:
☐ Copy of Cumulative Folder (Only the copy mailed between schools is considered an official c
☐ Current Schedule
☐ Report Cards
☐ Withdrawal Grades
☐ Test Scores -- Standardized, Writing, etc.
☐ Attendance & Tardy Record

Special Programs Records as Appropriate:
☐ Individual Education Plan (IEP)/Individual Accommodation Plan (IAP)/Gifted
☐ English as a Second Language (ESL)
☐ At-Risk or Other Action Plans for Classroom Modifications

Profile: Writing samples and other work samples -- these may have to be requested from individual
Be sure to allow sufficient time for these requests.
☐ Activities Records (co/extracurricular)
☐ Writing Samples
☐ Other Work Samples or Performance Assessments (e.g., CCC, Accelerated Reader)
☐ Academic Recognitions and Competitions

Departing School:
School Name:
School's POC:
POC's E-mail Address:
School Mailing Address:
School Phone Number:
School Fax Number:

- Army secondary education transition study

- DoD focus groups at the European Congress of American Parents, Teachers, and Students International Conference

- Military Impacted Schools Association Survey.

"Mobile Military Child Education"

VISION: Children of military families will have seamless educational transfers regardless of where they are relocated. Transfers will be facilitated and supported by a funded position whose primary duty is school liaison officer.

ISSUE: Frequent moves affect the educational success of children of military families.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Reassignments consider the educational needs of the child of the military family.	• Policies match family moves with child's educational needs • Military Family Profile • Trained Placement Personnel • Ed Op Information Web site	• MOUs with installations and surrounding school districts • Special needs advocacy training for parents and service providers	• Longitudinal effects study • Modify, manage and maintain prior implementations
2. Information systems and processes are consistently in place to provide/support smooth education transitions for students of military families.	• National agenda • Dedicated installation positions trained to support/facilitate educational needs • Advocacy Training • Transition Labs for Students	• State and local-level reciprocity for testing, curriculum, special needs • DoDEA diploma • On-line registration • Counselor training	• Electronic transfer of records • Military Student Education Information Smart Card • Special needs waivers • Modify, manage and maintain prior implementations
3. Information and support systems to provide smooth social and emotional transitions for students of military personnel are consistently in place.	• Youth sponsorship • National best practices • Educator awareness training • Local partnerships • Student Web site	• Government agency Partnerships/integration • DoDEA and public school counselor training	• Modify, manage and maintain prior implementations

2.6   MEASURES

Track:

- Number of 3- to 6-month advanced notices of assignments for families with school-age children

- Months in which involuntary moves are assigned for families with school-age children.

Measure:

- Number of funded positions with primary duty as school liaison officer at each installation

- Number of students graduating on time

- Number of students with sponsors

- Number of students whose records are exchanged in a timely manner

- Number of reciprocity issues resolved on State level

- Number of MOUs between installations and school districts

- Review the implementation and success of MOUs

- DoDEA Longitudinal Study.

Satisfaction Surveys:

- Heavily-impacted public schools

- Parents and students, including mission distrac-

**MILITARY CHILD EDUCATION
TEAM MEMBERS**

– Team Leader: Jean Silvernail OSD (MC&FP)
– Army: PK Tomlinson
– Navy: Pam Nemfakos, Ileen Rogers
– Air Force: Bill Cornell, Linda Stephens-Jones
– Marine Corps: Kathy Facon
– DoDEA: Taffy Corrigan
– OSD: Jan Witte, Barbara Thompson, Rebecca Posante

tion and spouse lost time.

Research:

★ Move stabilization for service member families of high school seniors

★ Mid-year relocation restrictions

★ Allocation of liaison officers for appropriate locations

★ Timely move/assignment notification policy based on Family Education Profile

★ ULB initiative concerning residency requirements for DDESS, including liberal waiver process

★ Housing policy affecting leased housing off base and DDESS attendance.

2.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to Barriers to Education.

2.8 LEGISLATIVE CHANGES REQUIRED

None identified.

3. CHILD AND YOUTH SERVICES

3.1 VISION

DoD families will have affordable, quality children and youth programs available to support their dual roles as military members and parents.

3.2 SCOPE

More children and youth programs are needed to support DoD families and the military mission.

3.3 PROCESS

Team members reviewed the research on measured outcomes for children who attend high quality, early childhood programs and family/work-life studies regarding implications of children and youth programs on productivity, retention, etc. Each Service prioritized the issues according to the needs of their service members.

Through group consensus, four primary issues were selected and translated into the goals listed below. Associated solutions were chosen from among

existing successful programs and reinforced by new procedures and policies when necessary.

3.4 GOALS

The team developed four goals to accomplish in making the Child and Youth Services vision a reality.

Goal 1. DoD child development programs are available to eligible patrons ages 0-12 years. Sample Solutions: Increase program by 45,000 spaces over 20 years; be responsive in meeting
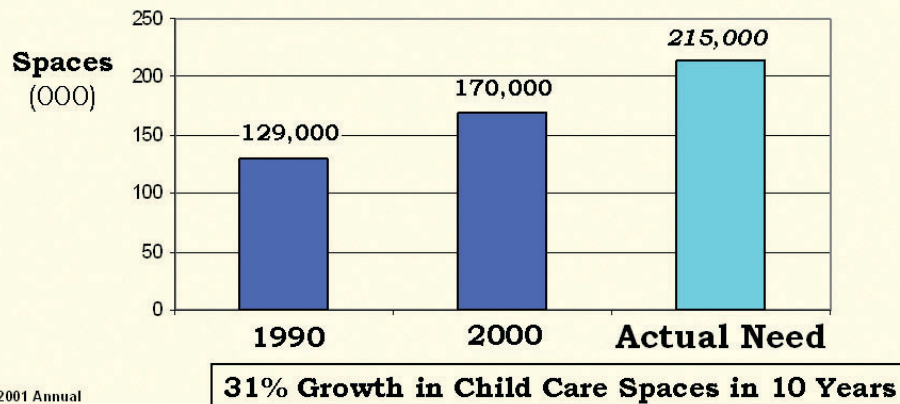
Current Environment…

• Frequent moves cause disruption to families due to limited availability of child care at many installations.

• Quality care continues to be a major financial concern for parents.

• Child care services are not designed to meet rapid expansion for operations and deployment.

• Majority of care is offered on base; thus, not effectively reaching the off-base community.

• Youth programs are inconsistent across installations and Services.

Tomorrow's Programs, Policies and Procedures Must…

• Sustain military child care programs as a national benchmark for quality, affordability and availability.

• Continue aggressive expansion of on and off base services through a balanced delivery system.

• Monitor affordability to meet the changing needs of military families.

• Address the capability to rapidly respond to contingency operations and deployments.

• Strive to establish military youth programs as the model for the nation.

Growth in Child Care Spaces

Spaces (000)

- 1990: 129,000
- 2000: 170,000
- Actual Need: 215,000

31% Growth in Child Care Spaces in 10 Years

2001 Annual Child Care Report

Child Care Construction (Estimate)

Child Development Centers (642)

($M's*)

- 1980-1990: 207 Ctrs
- 1991-2000: 247 Ctrs
- 2001-2002: 11 Programmed Centers
- 2003-2023: 160 Ctrs — Unprogrammed (25K spaces); 80 Ctrs — Recapitalization

Current Spaces (FY 02) = 170K
Need 215K

*New construction, renovations, expansion

Monitoring the Status of the Force

unforeseen needs caused by national emergencies; maintain, evaluate, and modify programs as needed.

Goal 2. Military child development programs are consistently offered at a cost affordable to patrons. Sample Solutions: Promote family economic well-being; adapt fee schedule to ensure affordability; revise fees as required.

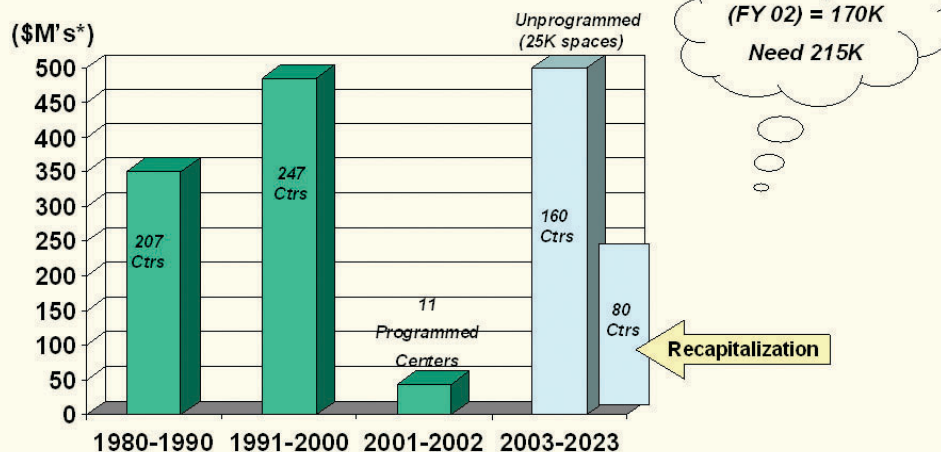**Goal 3.** All DoD child services will be staffed by professionally trained and qualified individuals, and will meet DoD-endorsed national standards that define high quality operations. Sample Solutions: Certify and accredit all programs; endorse credentials for staff, volunteers, and providers; evaluate and modify standards to meet changing needs of the force.

Goal 4. Institute youth programs as an equal component in the children and youth delivery system. Sample Solutions: Assess the needs of youth to include required program and potential usage; establish standards and policies; establish partnerships in the civilian community; develop staff qualifications and training to ensure staff equality across programs.

3.5 SUPPORTING RESEARCH

Helburn, S., ed. (1995). "Cost, quality, and child outcomes in child care centers: Technical report." Denver, CO: Dept of Economics, Center for Research in Economic and Social Policy, University of Colorado, etc.

Newman, R., et al. (1999). "A matter of money: The cost and financing of youth development." Washington, DC, Center for Youth Development and Policy Research. Academy for Educational Development.

Zellman, G., etal. (1998). "RAND: Examining the implementation and outcomes of the Military Childcare Act of 1989."

GAO Study. (1999). "Childcare: How do military and civilian center costs compare?"

Zellman, G., et al. (1994). "RAND: Examining the effects of accreditation on military child development center operations and outcomes."

Galinsky, E., et al. (1998). "The 1998 business work-life study sourcebook."

3.6 MEASURES

Track:

★ Potential need for child development programs

★ Number of accredited and certified programs

★ Progress toward meeting child care demand

★ Potential need of youth programs

★ Annual fee analysis

★ Number of patrons who pay more than 10 percent of their annual income on child care/youth programs

★ Number of increased spaces in the child development program

★ Number of increased spaces in the youth program

★ Number of accredited centers and family child care systems/homes.

"Child and Youth Programs"

VISION: *DoD families will have affordable, quality children and youth programs available to support their dual roles as military members and parents.*

ISSUE: More children and youth programs are needed to support DoD families and the military mission.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. DoD child development programs are available to eligible patrons ages 0-12	• Increase program by 16,000 spaces • Be responsive in meeting the unforeseen needs caused by national emergencies	•Increase program by 7,000 additional spaces	•Increase program by 22,000 spaces •Maintain, evaluate and modify as indicated
2. Military child care programs are consistently offered at a cost affordable to patrons	•Promote family economic well-being •Adapt fee schedule to ensure affordability	•Continue to monitor fee schedule •Revise fees as required	
3. All DoD child services will be staffed by professionally trained and qualified individuals, and meet DoD-endorsed national standards that define quality operations	•Certify and accredit all programs •Endorse credentials for staff volunteers and providers	• Track accreditation levels across all programs • Evaluate and modify standards to meet changing needs of the force	
4. Institute youth programs as an equal component in the children and youth delivery system	•Assess the needs of youth to include required program and potential usage •Establish standards and policies	•Establish partnerships in the civilian community	

**CHILD AND YOUTH SERVICES
TEAM MEMBERS**

– Team Leader: Jan Witte, OSD (MC&FP)
– Army: M.-A. Lucas, Mary Ellen Pratt-Phillips
– Navy: Bruce Sherman, Susan Roberts
– Air Force: Beverly Schmalzried, Beverly Houston
– Marine Corps: Karen Morgan, Dale Thompson
– OSD: Barbara Thompson, Carolee Van Horn

3.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to child and youth programs.

3.8 LEGISLATIVE CHANGES REQUIRED

The following legislative changes are necessary to achieve goals:

★ Childcare discounts for staff with children attending child development programs

★ Legislative mandate for youth, school age care, and family child care programs to be accredited

★ Continuation of the National Defense Authorization Act for Fiscal Year 2000.

4. NEW PARENT SUPPORT

4.1 VISION

Every active duty family with preschool children will have access to home visiting services to support their dual roles as military members and parents.

4.2 SCOPE

The New Parent Support Program needs to expand in locations and staff to meet current needs for providing support to DoD families with young children.

4.3 PROCESS

Team members reviewed the research on home visiting-based parent support programs and studied outcomes for child health, reduction in potential child abuse and neglect, and reduction in potential domestic violence, since these have implications for mission readiness, retention, etc. Through group consensus, the three primary issues were selected and translated into the goals listed below. Associated solutions were chosen from existing successful programs and reinforced by new procedures and policies when necessary.

4.4 GOALS

The major goals include:

Goal 1. Uniform DoD NPSP-Standard and NPSP-Plus services are available to active duty parents from the prenatal period to the child's third birthday.
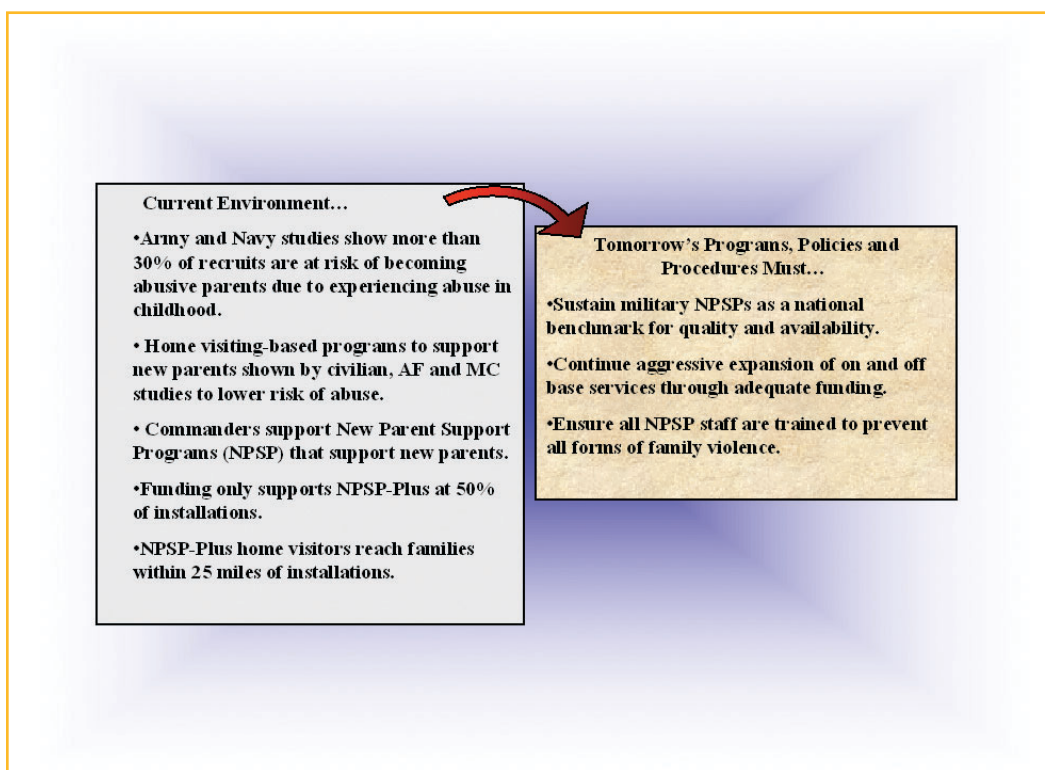
Goal 2. All DoD NPSP programs will be staffed by professionals qualified in the prevention of family violence.

Goal 3. DoD will establish an evaluation procedure for NPSP activities.

4.5 SUPPORTING RESEARCH

GAO. (1991). "Home Visiting: A Promising Early Intervention Strategy for At-Risk Families."

Current Environment…

• Army and Navy studies show more than 30% of recruits are at risk of becoming abusive parents due to experiencing abuse in childhood.

• Home visiting-based programs to support new parents shown by civilian, AF and MC studies to lower risk of abuse.

• Commanders support New Parent Support Programs (NPSP) that support new parents.

• Funding only supports NPSP-Plus at 50% of installations.

• NPSP-Plus home visitors reach families within 25 miles of installations.

Tomorrow's Programs, Policies and Procedures Must…

• Sustain military NPSPs as a national benchmark for quality and availability.

• Continue aggressive expansion of on and off base services through adequate funding.

• Ensure all NPSP staff are trained to prevent all forms of family violence.

4. NEW PARENT SUPPORT

"DoD New Parent Support Program"

VISION: *DoD parents can access New Parent Support Services (Standard and Plus) that support their dual roles as military members and parents from the prenatal period to the child's third birthday.*

ISSUE: NPSP services need to expand in locations and staff to meet current needs for providing support to parents of young children.

GOALS	SHORT-TERM (0-5 yrs.)	MID-TERM (8 yrs.)	LONG-TERM (15 yrs.)
1. Uniform DoD NPSP-Standard and NPSP-Plus services are available to active duty parents from the prenatal period to the child's third birthday.	• All installations have some NPSP-Standard and NPSP-Plus services. • DoD NPSP-Plus home visiting-based model implemented across installations.	• DOD NSP-Standard model implemented across installations	• DoD installations provide NPSP-Standard services to Guard and reserve families.
2. All NPSP programs are staffed by professionals trained in the prevention of family violence.	• Additional NPSP staff acquired. • Develop policy and standards for DoD NPSP staff training. • DoD NPSP-Plus staff trained in prevention of family violence.	• NPSP-Standard staff trained in prevention of family violence.	• DoD contractors or staff providing NPSP services to Guard and reserve families trained in prevention of family violence.
3. DoD will establish an evaluation process for NPSP activities.	• Develop DoD NPSP policy and program evaluation standards. • Conduct pilot evaluations of NPSP-Plus programs.	• Evaluate all DoD NPSP-Plus services. • Conduct pilot evaluations of NPSP-Standard programs.	• Evaluate all DoD NPSP-Standard services.

(GAO/HRD-90-83) The GAO recommends home visiting-based support for all new parents to help reduce child abuse and neglect.

Defense Science Board. (1995). "Report of the Task Force on Quality of Life, Oct. 2001." Recommended NPSPs to support readiness: reduce medical, investigative, early return, corrections, and transitional compensation costs arising from child abuse cases, service member time not on mission and reduce command time devoted to the personnel implications of child abuse.

Guterman, Neil. (2000). "Stopping Child Maltreatment Before it Starts: Emerging Horizons in Early Home Visitation Services." Thousand Oaks, CA: Sage Publications, pp. 158-160. Early home visitation services to parents at risk for family violence shown to be effective. Discusses DoD model, balancing some services for all new parents in NPSP-Standard and intensive services in NPSP-Plus for higher risk parents, as one of eight national exemplar models.

Salas, M. and Besetsny, L. (2001). "Transition into Parenthood for High-Risk Families: The New Parent Support Program," in J.L. Martin, L.N. Rosen, & L.R. Sparacino (eds.), "The Military Family: A Practical Guide for Human Service Providers." Westport, Conn.: Praeger Publishers. Air Force NPSP evaluation findings that child abuse potential in military parents at risk for family violence is reduced by home visitation services.

4.6 MEASURES

Track the following:

★ Number of children age 0-3 of active duty personnel assigned to military installations

★ Number of NPSP-Standard and NPSP- Plus programs

★ Number of NPSP staff trained in prevention of family violence.

Satisfaction Surveys for:

★ Parents
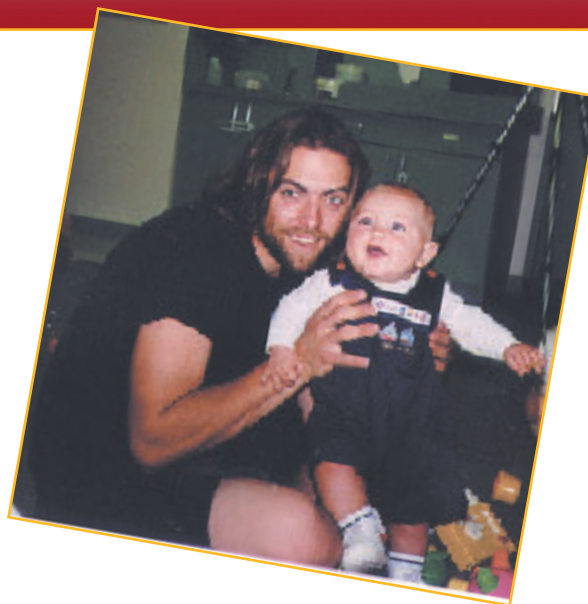
★ Commanders

4.7 LEGISLATIVE CHANGES REQUIRED

★ None identified.

NEW PARENT SUPPORT TEAM MEMBERS

– Team Leader: Martha Salas, AFMOA/FAP
– Army: Teri Maude, HQDA CFSC
　　　　 Jo Ellen Cerney, TAMC/JNPSP-HI
– Navy: Janet Fagan, PERS 661
　　　　 Chris Cairns, Bremerton NH
– Air Force: Pam Collins, AFMOA/FAP
– Marine Corps: Mary Page, HQMC M&RO
– OSD: David W. Lloyd, OASD (MC&FP/FAP)

5. COMMISSARY AND EXCHANGE BENEFIT

5.1 COMMISSARY VISION

To establish a Department identity for the commissary mission as a core element of family support provided by the government that provides substantial non-pay compensation to the military, improves the quality of life of our patrons, and enhances military readiness and retention of quality personnel.

5.2 COMMISSARY SCOPE

The Defense Commissary Agency's (DeCA) vision statement, "The Commissary Benefit, Cornerstone of Military Quality of Life," supports the primary goal to deliver the premier quality of life benefit for the military efficiently and effectively. Premier means customer savings of at least 30 percent over the commercial

Current Barriers...

• Commissary and exchange benefits are individually perceived as a function of availability and accessibility to stores, desired product assortment, convenience and quality of services, and savings compared to the commercial sector.

• Significant variation in information provided and access to recruiting, separation, and training forums. Inconsistent measures and methods are used to value the benefits—for both pay and non-pay purposes.

• Restrictions on authorized product selection, marketing and advertising preclude effective communication with authorized patrons.

• On base store location, increases in security, and commissary store hours makes shopping difficult for many patrons.

• Access to the commissary benefit is further restricted for Reserve Component members who are limited to 24 days a year.

Tomorrow's Programs, Policies and Procedures Must...

▪ Clearly and consistently measure and communicate the savings and services provided by the commissary and exchange benefits.

▪ Consistently value the commissary and exchange benefits throughout the non-pay and compensation systems.

▪ Train military leadership, recruiters, and educators to advocate the commissary and exchange benefits.

▪ Place stores to serve higher concentration active duty populations.

▪ Implement effective marketing, stock assortment, and off-base advertising programs.

▪ Authorize full commissary benefits for Reserve and Guard personnel.

Command, and the Marine Corps Exchange developed the commissary and exchange Social Compact together to ensure commonality among the resale system through a series of meetings and drafts. The draft plan was reviewed by OASD (RA), OASD(MPP), ODASA(M&RA), OASN (M&RA), and ODASAF (FMP). DeCA assured conformance with their strategic plan and performance contracts.

5.4   COMMISSARY GOALS

The team identified three goals to ensure that its Commissary Benefit vision becomes a reality.

Goal 1. Define the commissary benefit. Commissaries provide a non-pay compensation benefit to military members and their families. They offer quality service and products desired by patrons at a significant savings, thus substantially increasing disposable income for the military community.

Clean, safe, and modern stores are provided at locations with a sufficient concentration of active duty service members and at designated remote and isolated locations. Stores are located and operated to ensure consistent delivery and to maximize convenient usage, particularly by active duty members and their families. For service members who do not

sector, forecasted sales increases, more innovations that serve the customers, and more attractive stores that match the needs of the military family. Efficiently and effectively means reducing unit costs of output while ensuring improved benefit performance.

5.3   COMMISSARY PROCESS

The ODASD(MC&FP), DeCA, the Army and Air Force Exchange Service, Navy Exchange Service

"Commissary and Exchange Benefits"

VISION: *To establish a Department identity for the commissary and the exchange missions, as core elements of family support provided by the government, that provide non-pay compensation benefits to the military.*

ISSUE: Commissary and exchange non-pay compensation benefits are not clearly defined, consistently measured, or communicated effectively to all segments of the military population.

Goals	Exchange Short Term (0 – 7 years)	Commissary Short Term (0 – 7 years)
1. *Define the commissary and exchange benefits*	• Market basket savings > 11% • Direct support of all qualifying AD locations, including forward deployed • COLA compensates AD assigned to non-supported locations • Customer service and product selection rated at industry average • Catalog and On-Line offers full product assortment • Facilities reinvestment at NRF industry average	• Average savings over commercial prices > 30% • Direct support of all qualifying AD locations • COLA compensates AD assigned to non-supported locations • Customer service and product selection rated at industry average
2. *Consistently communicate the commissary and exchange benefits*	• Market the facts on accessibility, service, and savings • AD, Reserve, Retiree Compensation Systems use consistent information • Standard Information at recruiting, basic training, Service Schools	• Market the facts on accessibility, service, and savings • AD, Reserve, Retiree Compensation Systems use consistent information • Standard Information at recruiting, basic training, Service Schools
3. *Include the total military force in the commissary benefit.*		• Full commissary benefits for Reserves and National Guard
4. *Consistently measure the commissary and exchange benefits*	• Savings benchmarked using standardized market basket price surveys • Service benchmarked to industry [American Customer Satisfaction Index (ACSI)] • Standard customer satisfaction score to compare US exchanges	• Savings benchmarked using standardized price surveys • Service benchmarked to industry [American Customer Satisfaction Index (ACSI)] • Standard customer satisfaction score to compare U.S. commissaries

to the benefit, cost of living allowances adjusted to increase pay compensation.

Goal 2. Communicate the commissary benefit consistently. The marketing plan communicates facts about the benefit, including accessibility, customer service ratings, and savings, through established military channels and all compensation systems. The Military Departments disseminate standard information at recruiting locations, basic training, and Service schools. Outreach programs advise patrons, especially those living and working off-base, of the products and services available.

Goal 3. Include the total military force. Full commissary benefits are authorized for the active duty Military, Retirees, National Guard and Reserves, and their family members, and certain other categories such as 100 percent disabled veterans, Medal of Honor recipients, and civil servants stationed overseas.

Goal 4. Measure delivery of the benefit consistently. Progress will be measured using a business-based approach, supported by activity-based management processes, metrics, and outcome results. Commissaries conduct periodic business reviews, surveys, focus groups, and site visits, and attend installation and command meetings to obtain feedback. The Department uses a standard index to compare customer satisfaction with leading U.S. grocery stores. DeCA uses a standard customer satisfaction score to report and assess each commissary. Using a database for scannable items, customer savings are measured by comparing commissary costs to like products in the commercial industry.

5.5 COMMISSARY SUPPORTING RESEARCH

★ Commissaries provide average savings over similar commercial stores in the United States of at least 30 percent.

★ Annually, DoD validates that cost of living allowances compensate all

members on active duty in locations where direct commissary support is not available.

★ Based on the results of the American Customer Satisfaction Index(ACSI) rating of commissary customer service, DoD annually reviews and assesses the authorized product categories provided by commissaries.

★ DeCA and Military Departments annually validate commissary operations using DoD criteria.

★ Military Departments annually conduct a review to validate that the commissary benefit information is distributed during recruiting, basic training, Service Schools, and the DeCA outreach program.

★ DeCA surveys and validates the effectiveness of the on-line commissary web site program, which provides commissary information by location, in reaching the active duty, Reserves, and retirees.

★ The Military Departments annually certify and update the DFAS payroll disclosure of the value of the commissary benefit to active duty, Reserves, and retirees.

★ DoD validates that the full commissary benefit is authorized for the total military force.

★ DeCA annually tracks savings, using annual price comparison assessment, conducted in accordance with standard industry practices, using a comprehensive database of actual prices for scannable items from commercial grocery stores and commissaries.

★ Annual DeCA unit cost results based on Agency's Performance Contract with DoD; annual DeCA store assessment report on commissary benefit to stakeholders.

★ DeCA validates customer service through annual surveys to evaluate commissary products and services for individual stores using the Commissary Customer Satisfaction Survey (CCSS), and seeks to improve customer satisfaction scores to at least 4.5 on a scale of 1 to 5.

5.6 COMMISSARY MEASURES

The following measures defining the commissary benefit are in place:

COMMISSARY BENEFIT TEAM MEMBERS

– Team Leader: Janis White OSD (MC&FP)
– DeCA: Dan Sclater
– AAFES: Bob Ellis; Bill Reid
– NEXCOM: Alex Douvres
– Marine Corps: Kathy Nuzum
– OSD: George Schaefer (MC&FP)

ADVISORS

– Army: LTC Steve Clark
– Navy: Mr. Buster Tate, Mr. Ed Pratt
– Air Force: Lt.Col. Stephen Jones
– OSD: Col. James Scott (RA), Ms. Jane Hoover (MPP):

★ Currently, the Army and Air Force Exchange Service (AAFES) uses the American Customer Satisfaction Index (ACSI) utilizing telephone surveys and indices to compare the major U.S. retailers and grocers. Based on the costs incurred by AAFES, the total cost for the three Armed Service exchanges and DeCA is estimated at $200K, to be borne by DoD. An OSD-sponsored customer service survey and index would be needed to compare commissaries and exchanges with commercial counterparts in the U.S.

★ The Commissary Customer Satisfaction Survey (CCSS) is an annual system-wide internal survey of commissary patrons, currently conducted by DeCA, which assesses each commissary store's customer service levels.

★ DeCA currently computes an annual internal Facilities Condition Index (FCI) score for infrastructure improvements.

★ DeCA currently uses standardized price surveys to measure customer savings by comparing the commissary costs of like products with the prices in commercial industry, using a comprehensive database of actual prices for scannable items from commercial grocery stores and commissaries.

★ The DeCA Performance Contract provides for annual unit cost analysis.

5.7 CURRENT COMMISSARY POLICIES

See Appendix D for a listing of current policies related to commissaries and exchanges.

5.8 COMMISSARY LEGISLATIVE ACTION REQUIRED

★ Authorization language to permit commissary store placement off-base where required to serve higher concentration of populations in active duty status.

★ Legislation to authorize full commissary benefits for Reserve and Guard personnel.

5.9 EXCHANGE VISION

To establish a department identity for the exchange mission, a core element of family support provided by the government. The exchange mission provides non-pay compensation benefits to military members, thus improving its patrons' quality of life and enhancing readiness and retention of quality personnel.

5.10 EXCHANGE SCOPE

The armed services exchange systems propose to:

★ Define the exchange benefit clearly

★ Measure the exchange benefit consistently

- ★ Complete a new, cohesive marketing and advertising strategy

- ★ Locate stores to facilitate convenient access

- ★ Change advertising and product assortment policies

- ★ Communicate the exchange benefit consistently to all segments of the military population.

For purposes of this review, the MWR support aspect of the exchange mission is not considered.

5.11 EXCHANGE PROCESS

The ODASD(MC&FP), DeCA, the Army and Air Force Exchange Service, the Navy Exchange Service Command, and the Marine Corps Exchange developed the Commissary and Exchange Social Compact together to ensure commonality within the resale system through a series of meetings and drafts. OASD(RA), OASD(MPP), ODASA(M&RA), OASN(M&RA), and ODASAF(FMP) reviewed the draft plan.

5.12 EXCHANGE GOALS

The team developed three goals to ensure the Exchange Benefit vision becomes a reality.

Goal 1. Define the exchange benefit. The exchanges provide a non-pay compensation benefit by offering quality, American-lifestyle food, products, and services at significant savings. These products and services are conveniently available, at home and abroad, in clean, safe, and modern stores at locations with a sufficient concentration of active duty and designated remote and isolated locations or through catalog and on-line stores. The exchange benefit is delivered in stores, through a catalog, and via on-line.

Exchanges support forward deployments, ships at sea, emergency and disaster relief efforts, international exercises, and contingency operations. For service members who do not have direct access to the benefit, cost of living allowances are adjusted to increase pay compensation.

Goal 2. Communicate the exchange benefit consistently. The marketing plan communicates the facts about the benefit, including accessibility, customer service ratings, and savings, through established military channels and all compensation systems. The Military Departments disseminate standard information at recruiting locations, basic training, and Service schools. Outreach programs advise patrons, especially those living and working off base, of the products and services available.

Goal 3. Measure delivery of the exchange benefit consistently. DoD uses a standard index to compare customer satisfaction levels with the leading department and discount stores in the United States. A standard customer satisfaction score will report customer satisfaction levels for the individual exchanges and compare the three exchange services worldwide. The exchanges will conduct annual, standardized market-basket price surveys (exclusive of alcohol, tobacco, and State and local taxes) to measure customer savings by comparing the costs of like products in the commercial industry in the United States.

5.13 EXCHANGE SUPPORTING RESEARCH

- ★ An OSD-sponsored customer service survey and index are needed to compare exchanges with their commercial counterparts in the United States. Currently, the Army and Air Force Exchange Service (AAFES) uses the American Customer Satisfaction Index (ACSI), which is compiled through telephone surveys and indices comparing the major United States retailers and grocers. On the basis of costs incurred by AAFES, the

team estimates the total cost for the three Armed Service Exchanges and DeCA at $200K, to be borne by DoD.

★ The Armed Services Exchanges have initiated a cooperative effort to conduct internal customer service surveys. The survey results are indexed to provide comparisons to past individual store performance, comparisons among stores, and composite comparisons among the three Armed Services Exchanges.

★ The exchanges have initiated a cooperative effort to conduct annual, standardized, market-basket price surveys (exclusive of alcohol, tobacco, and State and local taxes) to measure customer savings by comparing the costs of like products in the commercial industry in the United States.

5.14 EXCHANGE MEASURES

The following measures defining the exchange benefit are in place:

★ Exchange products and services are provided at market-basket savings of no less than 11 percent.

★ Annually, the Military Departments review exchange support and verify that it is provided at all military installations or housing areas that have a full-time active duty mission:

■ With 100 active duty members assigned or stationed in the immediate area and at least 20 miles distance or 30 minutes one-way travel time to the nearest exchange store

■ Designated remote and isolated locations.

★ Military Departments review the exchange products made available through catalog and on-line services.
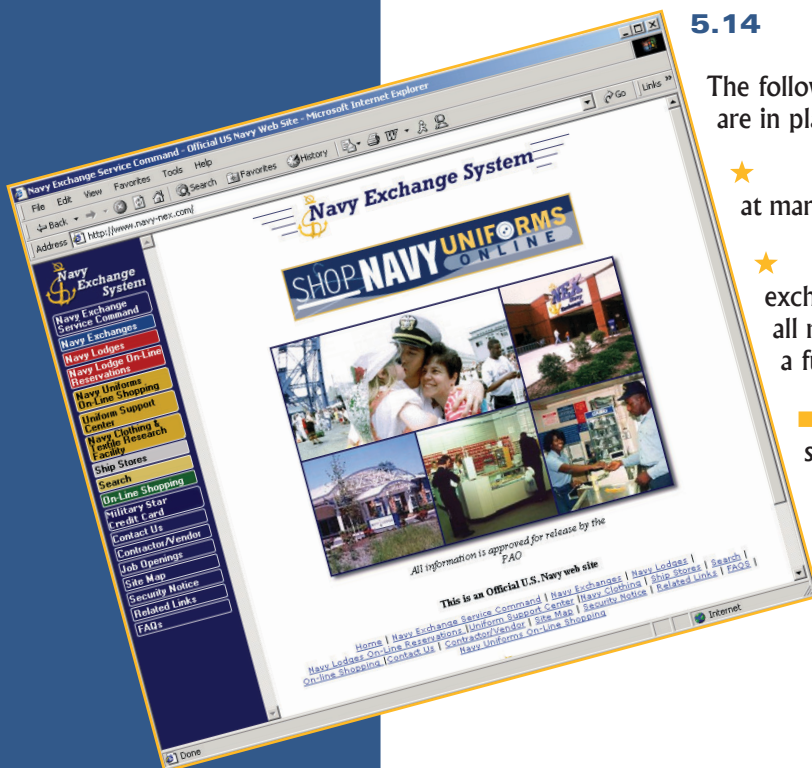
★ Capital investments in exchange stores are equal to the department and discount store industry average reported by the National Retail Federation.

★ Annually, the Military Departments conduct reviews to verify that exchanges provide health, comfort, and convenience items at all forward deployed locations, ships afloat, and disaster relief and contingency operations.

★ An annual DoD review is conducted to verify that cost of living allowances compensate all members on active duty in locations where direct exchange support is not available.

★ To ensure that the exchange benefit is communicated consistently, the Military Departments will annually:

- Conduct a review to validate that exchange benefit information is distributed during recruiting, basic training, and at Service schools.

- Certify and update the DFAS payroll disclosure of the exchange benefit value to active duty, Reserve, and retirees.

★ To measure the delivery of the exchange benefit, the Department of Defense will validate annually that:

- Customers rate exchange products and services at the department and discount store industry average reported by the American Customer Satisfaction Index (ACSI).

- Exchange products and services are provided at a customer satisfaction score equal to the department and discount store industry average published by the National Retail Federation.

- The exchanges develop, administer, and report a standard, annual, market-basket price survey.

5.15 CURRENT EXCHANGE POLICIES

See Appendix D for a listing of current policies related to commissaries and exchanges.

5.16 EXCHANGE LEGISLATIVE ACTION REQUIRED

Legislative action must be taken to obtain authorization language to:

★ Permit store placement off-base where required to serve higher concentration populations in active duty status

★ Permit off-base advertising

★ Lift the remaining restrictions on products and store construction standards.

Exchange Benefit Team Members

- Team Leader: Janis White OSD (MC&FP)
- DeCA: Dan Sclater
- AAFES: Bob Ellis; Bill Reid
- NEXCOM: Alex Douvres
- Marine Corps: Kathy Nuzum
- OSD: George Schaefer (MC&FP)

Advisors

- Army: LTC Steve Clark
- Navy: Mr. Buster Tate, Mr. Ed Pratt
- Air Force: Lt.Col. Stephen Jones
- OSD: Col. James Scott (RA), Ms. Jane Hoover (MPP):

6. DoD EDUCATION ACTIVITY

6.1 VISION

Children enrolled in DoD schools in military communities worldwide will be provided exemplary programs that inspire and prepare each student for success in a global environment. (DoDEA's Social Compact is based on the 2001-2006 Community Strategic Plan (CSP) developed with full participation and coordination of representatives from Military Departments, Combatant and major commands, parents, teachers, unions, and DoDEA administrators.)

6.2 SCOPE

The DoD Education Activity (DoDEA) proposes to: provide programs aimed at promoting the highest student achievement; ensuring efficient performance-driven management systems and a network of partnerships promoting student achievement and communication with stakeholders; and maintaining a motivated, high performing, diverse workforce that will result in exemplary performance and optimum student achievement.

6.3 PROCESS

A 3-step plan was implemented to develop the 2001-2006 DoDEA CSP, the supporting document for DoDEA's Social Compact, and annual Performance Contract. The following stakeholder groups were asked to provide representatives to the leadership team to develop vision, mission, guiding principles, goals, and desired outcomes:
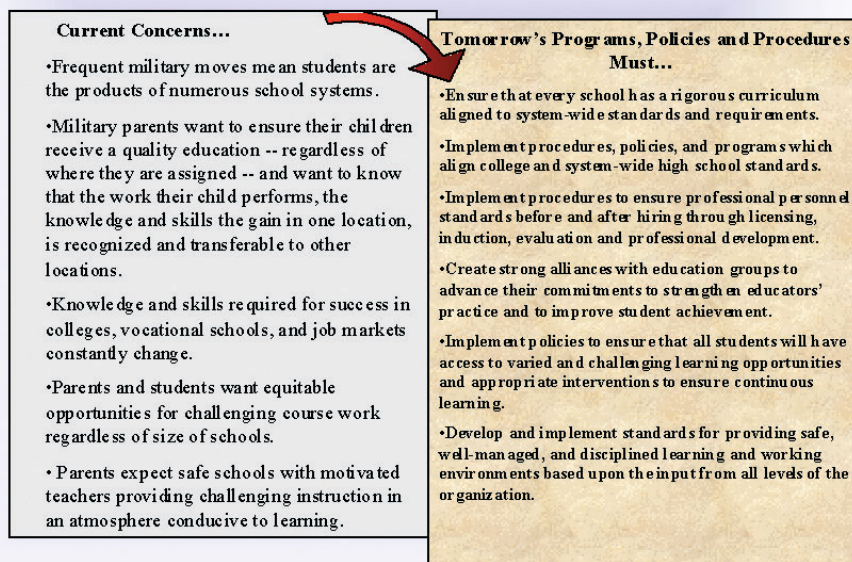
★ DoDDS Europe provided 11 representatives including the Superintendent, Principal, and Teachers of the Year.

★ DoDDS Pacific provided six representatives including Superintendents, Principals, and Teachers of the Year.

★ DDESS provided 10 representatives including Superintendents, Principal and District Teachers of the year.

Current Concerns...

•Frequent military moves mean students are the products of numerous school systems.

•Military parents want to ensure their children receive a quality education -- regardless of where they are assigned -- and want to know that the work their child performs, the knowledge and skills the gain in one location, is recognized and transferable to other locations.

•Knowledge and skills required for success in colleges, vocational schools, and job markets constantly change.

•Parents and students want equitable opportunities for challenging course work regardless of size of schools.

• Parents expect safe schools with motivated teachers providing challenging instruction in an atmosphere conducive to learning.

Tomorrow's Programs, Policies and Procedures Must...

•Ensure that every school has a rigorous curriculum aligned to system-wide standards and requirements.

•Implement procedures, policies, and programs which align college and system-wide high school standards.

•Implement procedures to ensure professional personnel standards before and after hiring through licensing, induction, evaluation and professional development.

•Create strong alliances with education groups to advance their commitments to strengthen educators' practice and to improve student achievement.

•Implement policies to ensure that all students will have access to varied and challenging learning opportunities and appropriate interventions to ensure continuous learning.

•Develop and implement standards for providing safe, well-managed, and disciplined learning and working environments based upon the input from all levels of the organization.

- ★ Combatant Commands provided three representatives for the European Command, two representatives for the Pacific Command, one for Southern Command, and one for Central Command.

- ★ DoDDS Europe provided four parents, DoDDS Pacific three parents, DDESS two school board presidents.

"DoD Education Activity Schools"

VISION: Children enrolled in DoD schools in military communities worldwide will be provided exemplary programs that inspire and prepare each student for success in a global environment.

ISSUE: Education programs must be continuously updated to ensure students are provided with the appropriate skills and knowledge for success in jobs or post secondary education.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Students meet or exceed challenging standards in academic content and are prepared for continuous learning and productive citizenship.	•Every school has rigorous curriculum aligned to system-wide standards •Balanced assessment system. •Longitudinal information data to measure progress.	•Review standards for rigor and alignment to curriculum •Benchmark DoDEA standards against other states	•Continue to realign and review standards •Continue to benchmark DoDEA standards against other states
2. DoDEA uses timely, efficient performance management system and places resources and decision making at lowest levels, facilitates a safe environment, and promotes communication/partnerships.	•Give schools substantial flexibility and control over personnel and resources while holding them accountable for the results	•Create strong alliances/ partnerships with education groups and business organizations	•Partnerships with DoDEA continually work to ensure rigorous standards in teaching, learning, and efficient business practices
3. The DoDEA workforce is motivated, diverse, and committed to continuous professional growth.	•Professional development resources focused, school leaders equipped for change, teaching requirements strengthened	•Select, prepare, and retain professionals who understand teaching and learning and can lead high-performing schools	•Develop policies and programs which implement a career continuum linked to compensation, knowledge, and skills

- ★ The four Service representatives were invited. Four FEA representatives, two FEA DDESS representatives, and one OFT representative were included. National Military Family Association was also represented.

- ★ Three special guests participated due to their affiliation with the Military Child Education Coalition.

The 3-step plan is described in the following paragraphs.

Step 1. A Leadership Team representing all stakeholder groups developed the goals and objectives for DoDEA. The work of this group, supported by staff subject matter experts, will provide the organization's vision for the five years the plan covers. To develop these expectations, the Leadership Team was given tools from the research report which included: an environmental analysis of major factors external to DoDEA that will affect operations over the next six years; a report of different approaches currently being used by external education systems to prepare for the future, focusing on those systems with demonstrated excellence in student performance, along with facts regarding what makes them so successful; an analysis of DoDEA's organizational competencies and resources (strengths and weaknesses); organizational values and aspirations developed through a combination of activities, including individual interviews, a survey, focus groups, and an analysis of the previous DoDEA CSP; and stakeholder and client analysis from the Customer Satisfaction Survey. Using all this material, the Leadership Team developed the Vision, Mission, Guiding Principles, Goals, and Desired Outcomes.

Step 2. Using the approved Leadership Team plan, the Steering Committee and District Superintendents

will annually develop performance measures and milestones for the current and future years to ensure continued progress toward reaching the goals and objectives. These annual performance goals will be incorporated into the budget process and annual DoDEA performance contract.

Step 3. Staff at all levels will implement goals, outcomes, measures and milestones. A key component is flexibility to allow districts, communities, and schools to address local issues/concerns. They will track and report progress annually. These data will be used to continue improvements.

6.4   GOALS

The team developed three goals to accomplish to ensure that the DoD Education Activity vision becomes a reality.

Goal 1. Highest Student Achievement: Students meet or exceed challenging standards in academic content and are prepared for continuous learning and productive citizenship (Short-term: Every school has rigorous curriculum aligned to system-wide standards, balanced assessment system, and longitudinal information data to measure progress).

Each site will identify interim growth targets based on summary as well as disaggregated data, which will lead toward all students performing "At the Standard" level or higher on the DoDEA Performance Standards in Reading/English/Language Arts and Math. DoDEA will use a systematic process for periodically reviewing and revising standards, purchasing materials, identifying courseware and technology infrastructure requirements, aligning assessments, developing curriculum tools, disseminating best practices, and assessing the quality of standards implementation. This curriculum development process will reflect the timeline requirements of the CSP. Each site will use an improvement process to reach the CSP goals with a special focus on helping all students achieve the DoDEA Performance Standards. Schools and districts will identify or develop local assessments, as needed, to supplement system-wide measures to document student progress toward reaching the goals of the CSP.

DoD Education Activity

Personnel and Readiness

Monitoring the Status of the Force

STUDENT PERFORMANCE

National Assessment of Educational Progress (NAEP)
"The Nation's Report Card"
Ranked Scores for 1998 & 2000

	1998 Reading		1998 Writing	2000 Math		2000 Science	
	4th Grade	8th Grade	8th Grade	4th Grade	8th Grade	4th Grade	8th Grade
DoDDS	5th	4th	3rd	8th	8th	7th	4th
African American	1st	1st	2nd	4th	2nd	2nd	1st
Hispanic	1st	2nd	1st	4th	2nd	2nd	2nd

	1998 Reading		1998 Writing	2000 Math		2000 Science	
	4th Grade	8th Grade	8th Grade	4th Grade	8th Grade	4th Grade	8th Grade
DDESS	7th	4th	1st	8th	9th	6th	4th
African American	2nd	2nd	1st	1st	1st	1st	2nd
Hispanic	2nd	1st	1st	2nd	4th	1st	1st

DoDEA Office of Communications

Goal 2. Performance-Driven, Efficient Management Systems/Network of Partnerships Promoting Achievement: DoDEA uses timely, efficient performance management systems; places resources and decision making at lowest levels; facilitates a safe environment; and promotes communication/partnerships (Short-term: Give schools flexibility and control over personnel and resources while holding them accountable for the results).

Each school, district, and area will use performance data for planning and have their annual improvement plans aligned with the budget cycle and the CSP. Each level will have resources allocated based on identified student needs. The resources will be used efficiently, equitably, and effectively to support a standards-based instructional program. Standards will be developed for maintenance and upgrade/ replacement of facilities, equipment, furniture, materials (such as textbooks, workbooks, calculators, and school supplies), and technology necessary to provide an instructional program aligned with student performance standards.

Goal 3. Motivated, High Performing, Diverse Workforce: The DoDEA workforce is motivated, diverse, and committed to continuous professional growth (Short-term: Professional development resources focused, school leaders equipped for change, teaching requirements strengthened).

Clarify roles and responsibilities among line and staff at different levels (including the individual employee) for defining, creating, maintaining, and evaluating professional development and training opportunities for all job categories and levels. Adopt instruments for assessing the impact of professional development and training on performance. Identify or develop tools to assess and prioritize the professional development and training needs of employees. Explore the use of current technology and other best practices to support improvements in professional development and training events and activities. Adopt National Staff Development Council's Standards for Staff Development.

6.5   SUPPORTING RESEARCH

Hendrix, S. (1999-2000). "Family literacy education—Panacea or false promise?" Journal of Adolescent and Adult Literacy, 43, 338-346.
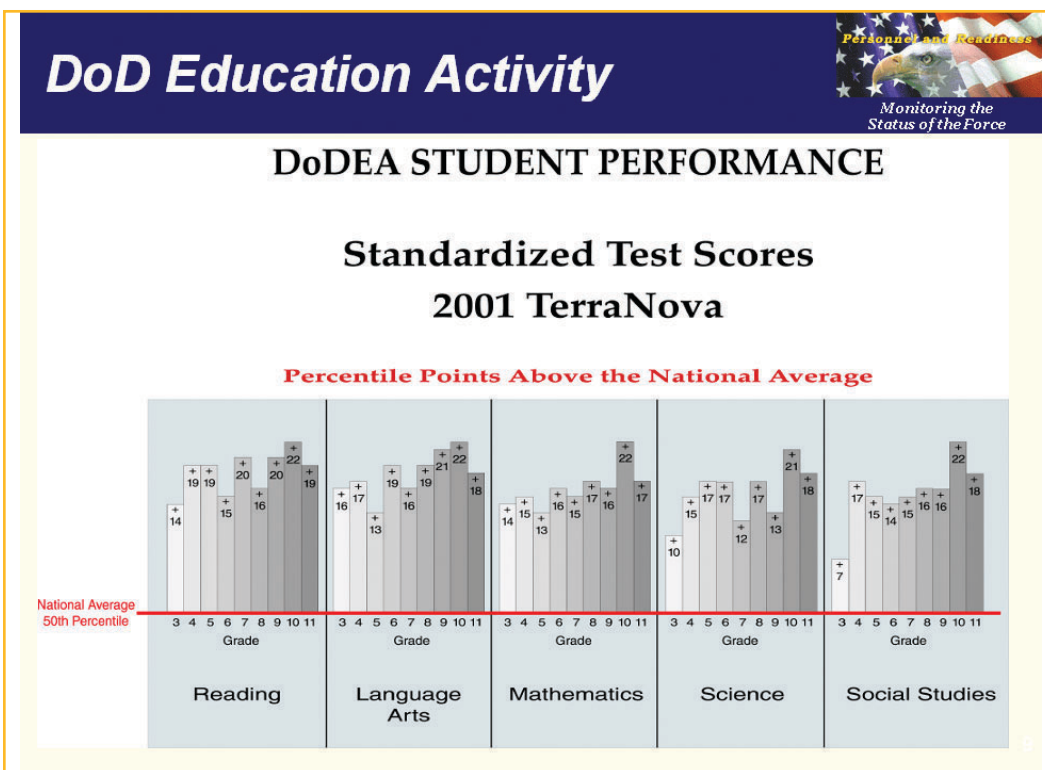
Gauvain, M., Savage, S., & McCollum, D. (2000). "Reading at home and at school in the primary grades: Cultural and social influences." Early Education and Development, 11, 447-463.

Additional Research. With contractor support, DoDEA conducted an environmental analysis, a review of DoDEA organizational competencies and resources, a review of organizational values and aspirations, and an analysis of stakeholder and client expectations. The two outlined below were key elements of the research component of the CSP development.

The environmental analysis looked at:

★ The major factors external to DoDEA that will affect school operations over the next six years and described, in detail, the problems and opportunities these environmental challenges create for DoDEA.

★ Different approaches currently being used by external education systems to prepare for the future, focusing on those systems with demonstrated excellence in student performance and an analysis of what makes them successful.

★ The requirements of the Government Performance Results Act requirements and requirements of the DoD Defense Reform Initiative Directives and their impacts on DoDEA's plan. Significant elements of review included Goals 2000: Educate America Act and the U.S. Department of Education's strategic plan; the Elementary and Secondary Education Act; The Third International Mathematics and Science Study (TIMMS, 1999) and resulting studies; The National Assessment of Education Progress; and available research on National Standards, Closing the Achievement Gap Among Racial and Ethnic Groups, Technology, Distance Learning, Community Engagement, and School Reform.

Stakeholder and Client Expectations. This phase gathered information from key DoDEA headquarters staff, DoDEA superintendents and other key leaders, and through on-site visits to five DoDDS-Europe Districts, five DoDDS-Pacific districts, and five DDESS districts where sessions were held with principals and other school administrators, elementary and secondary teachers, elementary and secondary parents, secondary students, community or other organizational interests (e.g., military command, personnel unions), and key district education leaders recommended by the district superintendent. Protocols were developed for each group, designed to encourage focus group members to discuss organizational strengths and shortcomings, and priorities for the system. The final component of this information came from a survey of stakeholders. About 15,000 surveys were sent to parents, teachers, and administrators to gather appropriate representation by geographic area, school district, school level, and school size.

A copy of the full DoDEA Community Strategic Planning Research Report is available upon request and is located on the DoDEA Web page at www.hq.odedodea.edu.

6.6 MEASURES

★ Students shall meet or exceed challenging standards in academic content

and are prepared for continuous learning and productive citizenship. DoDEA will regularly measure student performance in all disciplines through a balanced assessment system using multiple internal (local) and external (system-wide) assessments. The comprehensive system of assessments will provide educators, parents, and students with information for improved instructional decision making resulting in improved student performance.

External (system-wide) assessments will include norm- and criterion-referenced tests aligned to the DoDEA performance standards. External individual and summary student data will be reported using the following performance categories:

- Above the standard

- At the standard

- Partially met the standard

- Below the standard.

Note: Other data may also be reported, such as the median national percentile, normal curve equivalent, scale scores, etc.

- Internal (local) assessments may include performance assessments, work samples, and portfolios. System-wide and local assessment data will be disaggregated (gender, race, etc.) to identify student groups not achieving proficiency on the standards.

- External (system-wide) criterion-referenced assessments aligned to the DoDEA performance standards will be administered annually to selected grade levels. In addition, end-of-course assessments will be administered for selected high school courses.

- External (system-wide) norm-referenced assessments (currently TerraNova) will be administered annually to DoDEA students in grades 3 through 11 for reading, language arts, math, science, and social studies. Spring 2002 TerraNova scores for these grade levels will be reported by subject and used as the system-wide baseline measure for student progress.

- External (system-wide) criterion and norm-referenced assessments will be used to determine reading performance at the end of grade 3. Internal (local) measures will be used from Kindergarten through grade 2 to monitor progress toward third grade reading proficiency.

★ DoDEA uses timely, efficient performance management systems and places resources and decision making at lowest levels, facilitates a safe environment, and promotes educational partnerships.

- Percentage of units at each level (e.g. school, district, area, and HQ divisions) that use performance data for planning and
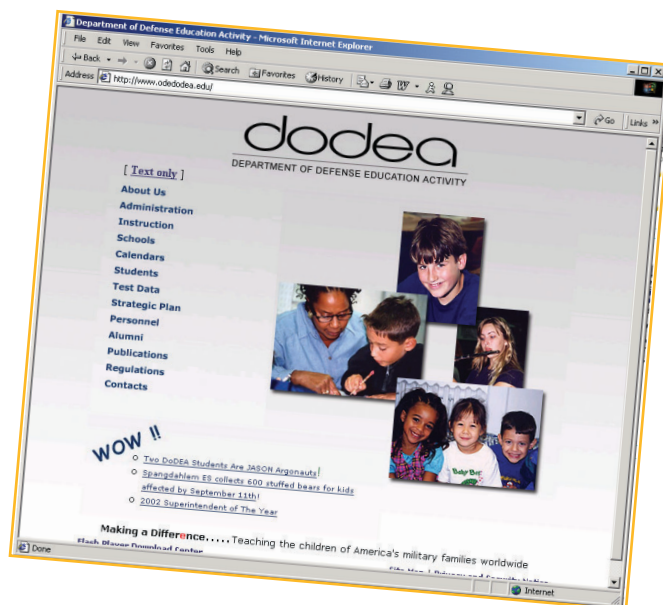
have aligned their annual improvement plans with the budget cycle and the CSP

- Percentage of units at each level with resources allocated based on identified student needs and used to support a standards-based instructional program

- Percentage of units at each level with resources that are used efficiently, equitably, and effectively

- Percentage of schools that meet the standards for facilities, equipment, furniture, materials (such as textbooks, workbooks, calculators, and school supplies) and technology necessary to provide an instructional program aligned with student performance standards.

★ The DoDEA workforce is motivated, diverse, and committed to continuous professional growth. DoDEA will continuously measure the availability and effectiveness of professional development and training activities and programs. All development and training opportunities will meet the standards of high quality as defined by the National Staff Development Council's Standards for Staff Development and will lead directly to enhanced job performance. Measures will include:

- The number of professional development and training opportunities that are aligned with school, district, and system priorities

- The percentage of employees who indicate that professional development offerings meet their needs to improve job performance

- Evidence of growth in classroom/school practice using Indicators of High Quality Instruction (also known as IC maps) in reading/English/language arts and math standard-based instruction.

★ No less than 95 percent of the DoDEA teachers will be professionally certified in the area and grade level to which they are assigned within three years of employment.

★ School Accreditation

★ Student Enrollment

★ Cost per student

★ Pupil - teacher ratio

★ Computer - student ratio

6.7   CURRENT POLICIES

See Appendix D for a listing of current policies related to barriers to education.

6.8 LEGISLATIVE CHANGES REQUIRED

Will be developed as identified/necessary. Two are currently in the ULB Process:

★ Amendment for Summer School Provisions for Defense Dependents Education System

★ Amendment for GTMO Living Quarters Allowance for Single Teachers.

DoDEA TEAM MEMBERS

– Team Leader: Dr. Georgia Williams-Scaife, DoDEA
– Army: PK Tomlinson
– Navy: Pam Nemfakos, Ileen Rogers
– Air Force: Bill Cornell, Linda Stephens-Jones
– Marine Corps: Kathy Facon

* DoDEA's Social Compact is based on the 2001-2006 Community Strategic Plan developed with full participation and coordination of representatives from Military Departments, Combatant and Major Commands, Parents, Teachers, Unions, and DoDEA Administrators.

7. FINANCIAL LITERACY

7.1 VISION

The military culture values financial literacy and responsibility.

7.2 SCOPE

Mission readiness and quality of life are dependent upon service members and their families using their financial resources responsibly. Obtaining responsible behavior from service members and their families requires a commitment from the Services to educate them and encourage them to use good financial sense. This commitment can be manifested through active participation by leadership and through effective awareness and education programs.

7.3 PROCESS

Representatives from ODASD(MC&FP), Army Finance Command, Army TRADOC, Army Installation-level PFM, Navy SEANET, Navy N6 , Air Force DP, Marine Corps Community Services, the National Endowment for Financial Education, the National Foundation of Credit Counselors, and the National Military Family Association developed the financial literacy Social Compact. Many of the members of this group have been meeting over the past 12 months developing policy and direction for the Personal Financial Management (PFM) program.

Current Reality...

- Potential recruits graduate high school with a poor understanding of personal finances—60 percent failed a basic financial literacy test in 2000.
- Young Service Members quickly incur debt before they are financially literate—32 percent of E1-E3s borrowed money from family and friends in a twelve month period to help with financial difficulty.
- Many Service Members repeat poor habits throughout their careers—28 percent of E-4s and 17 percent of E5-E6s borrowed money from family and friends.
- Service Members often do not seek information or help until they are over their heads.
- Family members are often not included in existing training venues
- Financial problems consume a lot of commander and senior NCO time and adversely impact mission readiness and capability.

Policies and initiatives that will encourage ...

- Leadership involvement that shows financial literacy is a valued trait in service members.
- Processes that highlight the impact of personal financial issues on readiness and mission capability.
- Education and training programs that engage family members and the total force, that are innovative and fun, and that encompass the entire military life cycle.
- Ongoing awareness campaigns that focus attention on the importance of financial literacy.
- Competition and award programs that focus attention on the "winners" and how they accomplished success.
- Effective use of governmental and non-governmental partnerships, as well as a commitment to sustain financial literacy programs through DoD resources.
- Effective evaluation processes that can highlight the impact of programs and assist in tailoring interventions.

7.4   GOALS

The team developed five goals necessary for making the financial literacy vision a reality.

Goal 1. Foster a climate that embraces financial literacy as an integral part of mission readiness and quality of life. Leadership can influence others to value responsible financial behavior by emphasizing its importance to mission accomplishment. Leadership statements tying responsible financial behavior to existing value statements, as well as processes that report financial behavior as a component of mission readiness, can give service members the clear message that understanding and applying financial principles are critical to mission accomplishment.
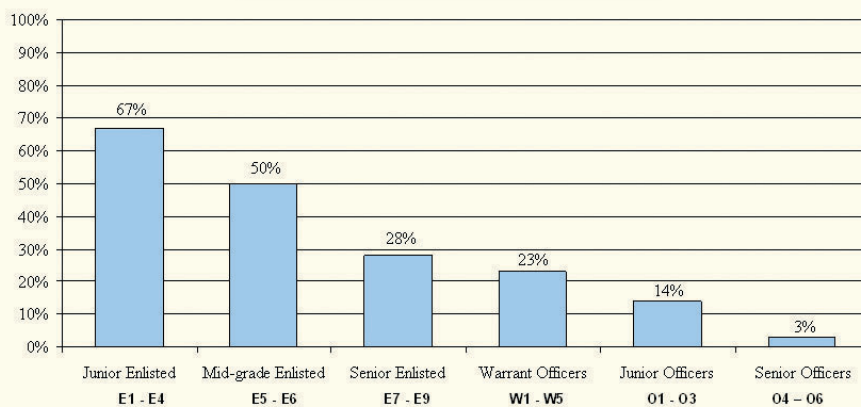
Goal 2. Implement a sustained PFM marketing program that improves money management skills and behavior. A sustained multimedia marketing campaign to increase service members' and their families' awareness of the importance of financial literacy can be accomplished through a combined effort of DoD and other governmental and non-governmental agencies. Such a campaign can include competitions to identify individuals, families, and units whose financial behavior is exemplary. In addition, programs that target youth through schools and youth programs can have an indirect influence on parents' behaviors and values.

Goal 3. Establish and maintain a comprehensive, state-of-the-art educational and training program that helps service members achieve financial literacy. Financial literacy programs must start early, continue through service members' careers, and include family members. These programs must focus on

the needs and interests of service members and their families through applying state-of-the-art learning systems and emerging technology. To capture their interest, these programs must be relevant and engaging.

Economic Issues
Savings/Investments

Personnel and Readiness
Monitoring the Status of the Force

Savings of $1,000 or Less

	Junior Enlisted E1 - E4	Mid-grade Enlisted E5 - E6	Senior Enlisted E7 - E9	Warrant Officers W1 - W5	Junior Officers O1 - O3	Senior Officers O4 – O6
%	67%	50%	28%	23%	14%	3%

Approximate Amount of Total Family Savings (e.g., IRAs, money market accounts, Certificates of Deposit (CDs), Savings Bonds, mutual funds, stocks and/or bonds, etc.)

1999 ADS
(Member) Q89

"Institutionalize Financial Literacy"

VISION: Military culture values financial literacy and responsibility.

ISSUE: Lack of personal financial literacy adversely impacts mission readiness and QoL.

Goals	Short Term: 0-7 years	Mid Term: 10 years	Long Term: 20 years
1. Leadership: Foster a climate that embraces financial literacy as an integral part of mission readiness and QoL	▪ Tie value statements associated with financial literacy to existing value statements for each of the Services ▪ Tie family financial readiness to mission readiness reporting	▪ Leadership embraces PFM as a key tool to achieve readiness and QoL	▪ PFM is an integral part of the military culture
2. Marketing: Implement a sustained PFM marketing program that improves money management skills and behavior	▪ Sustain a multimedia PFM marketing campaign ▪ Develop partnerships and public-private ventures ▪ Develop reward programs to sustain effort over time ▪ Target military youth	▪ Institutionalize PFM awareness	▪ Military is role model for the nation in financial literacy
3. Education: Establish and maintain a comprehensive and state-of-the-art education and training program that achieves financial literacy	▪ Establish standards for education and training to achieve measurable outcomes ▪ Provide comprehensive education and training that engages family and total force ▪ Ensure education and training programs start early and continue through the military life cycle ▪ Take advantage of emerging technologies	▪ Education and training systems achieve standards and meet desired outcomes	▪ Family and total force engages in healthy financial management
4. Resources: Allocate resources to achieve a cost-effective cultural shift to financial literacy	▪ Fund emerging PFM needs according to fact-based requirements and standards ▪ Make effective use of partnerships to augment PFM programs through training and service delivery	▪ PFM programs are funded according to standards and partnerships are fully integrated	▪ Return on investment is realized
5. Evaluation: Employ an evaluation system to sustain and measure the effectiveness of PFM programs and tailor interventions	▪ Design a standardized evaluation system to measure and validate the effectiveness of PFM programs ▪ Develop a system of standards, benchmarks and accreditation	▪ Evaluation is used as an effective tool to validate and tailor the PFM program	▪ Evaluation is fully institutionalized into the culture

Goal 4. Allocate resources to achieve a cost-effective cultural shift to financial literacy. Current losses in productivity by service members, supervisors, and commanders as a result of personal financial problems are costly. By funding effective education and awareness programs with the assistance of other governmental and non-governmental organizations, the impact of these problems can greatly be reduced. By using effective evaluations to guide interventions, resources can be applied efficiently to bring about the desired change.

Goal 5. Employ an evaluation system to sustain and measure the effectiveness of PFM programs and to tailor interventions. The impact of efforts to improve financial literacy cannot be determined without effective evaluation. Gaining the commitment to invest the resources needed to attain the vision will come from fact-based evaluations of the impact of PFM programs. Also, by developing a systematic approach to measuring PFM programs, best practices can be determined and programs can be adjusted to improve performance.

Typical E-3 Household

E-3 (married with two children)

Total Income	$2871
Income	$2071
Spouse Earns	800
Minus Typical Expenses	
Rent	$ 597
Utilities/Telephone	195
Miscellaneous	300
Car Payment	250
Car Insurance	90
Child Care	400
Fuel	80
Groceries/Supplies	500
Credit payment	300
Total Expenses	$2712
Disposable Income	$ 159

E-3 Average Savings $1600

E-3 Unsecured Debt $4600

Navy/MC   1999 ADS Spouse

7.5   SUPPORTING RESEARCH

Bush, M., Hudson, S., & Jacob, K. (2000). "Tools for survival: An analysis of financial literacy programs for lower income families." Chicago, IL: Woodstock Institute. http://www.woodstockinst.org/survival.html.

Ferber, R., & Chao Lee, L. (1974). "Husband-wife influence in family purchasing behavior." Journal of Consumer Research, 1, 43-50.

Hogan, M.J., & Bauer, J.W. (1988). "Problems in family financial management." In C.S. Chilman, F.M. Cox, & E.W. Nunnally (Eds.), "Employment and economic problems. Families in trouble series" (Vol 1, pp. 137-153). Newbury Park, CA: Sage Publications, Inc.

Huston, A. C., Duncan, Greg J., Granger, R., Bos, J., McLoyd, V., Mistry, R., Crosby, D., Gibson, C., Magnuson, K., Romich, J., & Ventura, A. (2001). Work-based antipoverty programs for parents can enhance the school performance and social behavior of children. Child Development, 72, 318-336.
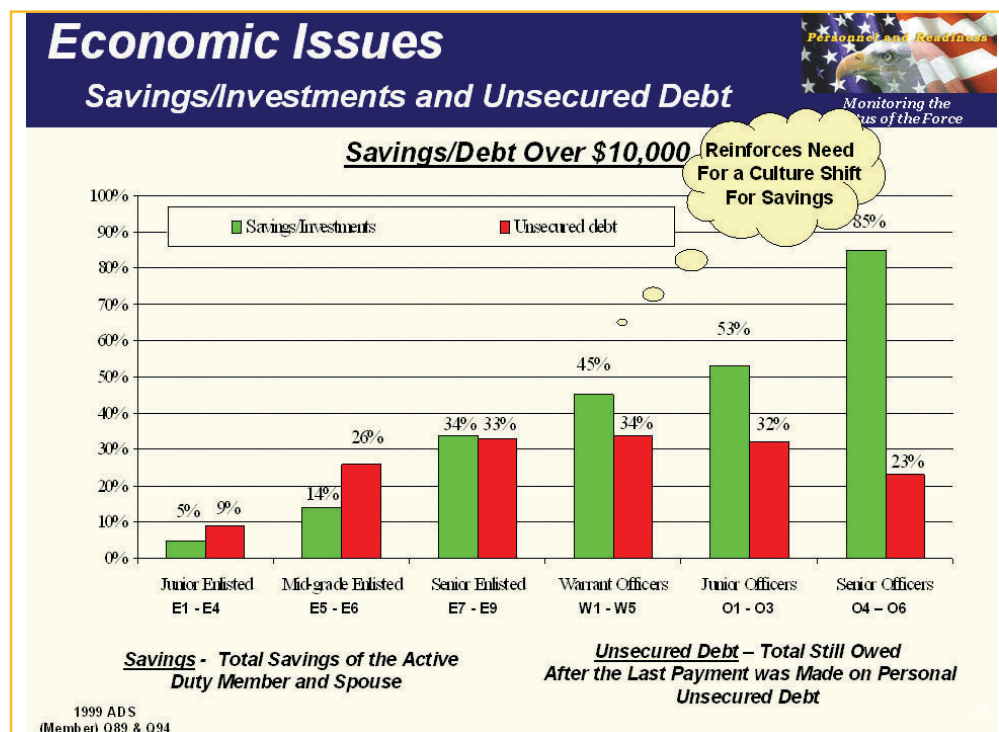
Joo, S., & Grable, J.E. (2000). Improving employee productivity: The role of financial counseling and education. Journal of Employment Counseling, 37, 2-15.

Williams, M. E., & Hudson, S. (1999). Building the savings and assets of lower income consumers. Chicago, IL: Woodstock Institute. http://www.woodstockinst.org/assets.html.

7.6   MEASURES

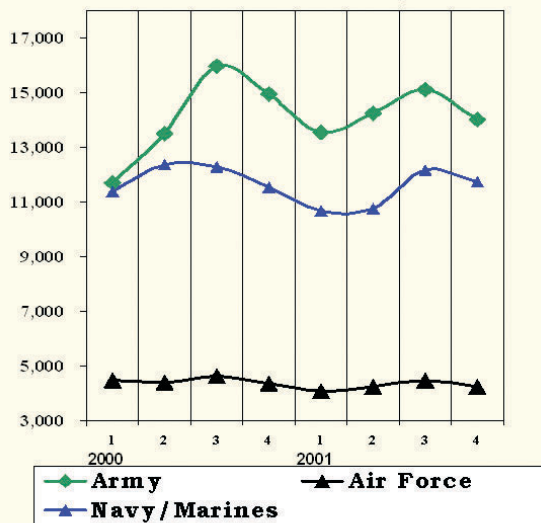Although there are a few measures of indebtedness available, such as numbers of returned checks and delinquent credit accounts for the Exchange

Economic Issues
Savings/Investments and Unsecured Debt

Monitoring the Status of the Force

Savings/Debt Over $10,000

Reinforces Need For a Culture Shift For Savings

Legend: ■ Savings/Investments   ■ Unsecured debt

	Junior Enlisted E1 - E4	Mid-grade Enlisted E5 - E6	Senior Enlisted E7 - E9	Warrant Officers W1 - W5	Junior Officers O1 - O3	Senior Officers O4 – O6
Savings/Investments	5%	14%	34%	45%	53%	85%
Unsecured debt	9%	26%	33%	34%	32%	23%

Savings - Total Savings of the Active Duty Member and Spouse

Unsecured Debt – Total Still Owed After the Last Payment was Made on Personal Unsecured Debt

1999 ADS (Member) Q89 & Q94

7. FINANCIAL LITERACY

Relief Society Assistance

Personnel and Readiness

Monitoring the Status of the Force

Number of Financial Cases By Quarter

Navy-Marine Corps Relief Society Reasons for Assistance

Reason	% of Cases
•Unforeseen Emergency	49.5%
•Mismanagement	23.4%
•PCS Move	3.4%
•Illness	2.6%

Legend: Army, Air Force, Navy/Marines
X-axis: 1, 2, 3, 4 (2000), 1, 2, 3, 4 (2001)

Services, numbers of bankruptcies filed, and the number of discharges as a result of financial indebtedness, these provide only indicators of the financial health of the force. The most comprehensive evaluation tool available has been the Defense Manpower and Data Center (DMDC) Active Duty Survey of 1999, which provided a series of self-reported information by Service, grade, and CONUS/overseas location. An annual survey of this nature can provide the kind of feedback that can give an overall assessment of the financial health of the force.

Additionally, evaluations of interventions are needed to ensure that resources are invested in options that have an impact on behavior. This may involve specific studies of test programs or more broad evaluations of changes in standards, policies, and procedures. Research will be an essential element to shaping the program.

Other measures include tracking the:

★ **Service aid society cases**

★ **Percentage of units that report a C2 rating or better for PFM.** Mission effectiveness is measured through the Status of Resources and Training System (SORTS) reporting that rates the readiness capability of units based on their evaluation of personnel, training and equipment required to accomplish wartime taskings. PFM is currently not a factor in evaluating the

FINANCIAL LITERACY TEAM MEMBERS

– Team Leader: Col Marcus Beauregard, OSD (MC&FP)
– Army: CSM Stephen Buckley, Sylvia Lyles, Robin Johnson
– Navy: Bill Coffin, Barry Hoag
– Air Force: Shontelle Rivers
– Marine Corps: Mary Page
– OSD: James Ellis
– Others: Harry Sherr (NEFE), Kathy McNally (NFCC), Lillie Cannon (NMFA)

readiness of personnel to deploy. Although this would make PFM only one factor among several others in evaluating personnel, it would identify it as a key element of personnel readiness.

★ **Amount of time spent by commanders and senior NCOs in resolving PFM issues and administering punishment as a result of PFM problems.** An ancillary impact of personal financial problems is the time and focus required by military leadership to resolve these problems as opposed to concentrating on other mission-related issues. Tracking the decrease in their involvement shows a payback for the additional time and effort spent in preparing service members and their families.

★ **Changes in level of awareness of PFM among service members and their families.** The impact of awareness campaigns should be evaluated through measuring changes in service member and spouse recognition of the importance of sound financial management to quality of life and mission effectiveness. This could be accomplished through an appropriate survey instrument that measures attitudes.

★ **Change in level of financial literacy, including measurement of knowledge and skill levels.** The impact of education and training programs should be measured in terms of the service member's and spouse's improved levels of understanding of sound financial management

practices, and also their ability to apply the necessary skills to accomplish tasks effectively.

★ **Percentage of installations that meet resource allocation standards.** To effectively maintain PFM programs, resources need to be allocated at a rate commensurate with the demand for services. Standards prescribing program requirements are an effective method of determining the adequacy of programs and the appropriate level of support.

★ **Aggregate level of relevance and validity of evaluations.** The evaluations of effectiveness of efforts to improve financial literacy need to be measured against the outcome of these efforts. We may provide exceptional awareness materials and state-of-the-art training; but, if it doesn't change behavior, programs and methods of evaluation should be adjusted. By measuring indicators of financial well-being, such as levels of unsecured debt and levels of savings, through self-reported survey data, the impact of the overall initiative can be evaluated.

7.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to financial training.

7.8 LEGISLATIVE CHANGES REQUIRED

None identified.

8. WORLD CLASS HEALTH CARE

8.1 VISION

Build and sustain a world-class health care system that meets all wartime and peacetime health and medical needs of the active duty service members, Reservists, retirees, and their families—more than 8 million beneficiaries.

8.2 SCOPE

Health care in the military is a quality of life issue, a recruiting and retention tool, and the means by which the Department of Defense retains a fit and healthy force. The Military Health System consists of the direct care system, supplemented with care provided by a network of civilian providers through TRICARE.

The direct care provided at military treatment facilities relies on fully trained and militarily prepared health care personnel to ensure high quality health care for all eligible beneficiaries. A robust peacetime health care delivery system is critical to a healthy force and to medical preparedness for contingencies as well. Investing in the direct care system provides the additional return of ensuring a prepared and deployable medical force to support our combat formations.

8.3 PROCESS

To create this road map to a world class health care system, the team created a Social Compact strategy consistent with the Quadrennial Defense Review inputs and asked team members to provide their perspectives.

8.4 GOALS

The team developed five goals and associated milestones to accomplish in ensuring that its vision of a World Class Health Care System becomes a reality.

Goal 1. Support mili-

Current Programs, Policies and Procedures...

- Have chronically under-funded the Military Health System by not recognizing realistic medical inflation factors and advances in medical technology.

- Do not allow the TRICARE program to have a strong, innovative, and unified management of the entire Military Health System to ensure maximum integration and unity of effort.

- The current business strategies and purchased care architecture for the DHP does not properly align incentives, ensure a stable business environment, and provide for efficient and effective management of an integrated program.

- Allow the Department to attract fully trained providers into the Service and to motivate our medical and dental providers to stay in.

Tomorrow's Programs, Policies and Procedures Must...

- **Fully Fund the military health care system.**

- **Realign funding for military personnel from the Service MILPERS account to the Defense Health Program O&M account.**

- **Establish the Medicare-eligible Retiree Health Care Fund.**

- **Strengthen the TRICARE management structure.**

- **Move to a new contracting platform for purchased care.**

- **Conduct a Total Force medical personnel zero based review to address the medical recruitment, retention, training, shape the force and specialty mix issues.**

"Providing A World Class Health Care System"

VISION: To provide a world class health care system.

ISSUE: How can DoD provide high quality, affordable health care for all categories of DoD beneficiaries.

GOALS	SHORT-TERM (0-7 yrs.)
1. Support our military operations worldwide	• Maintain our medical readiness status
2. Meet our beneficiaries' expectation for access and quality	• Increase access to care by improved appointing/meet access standards • Introduce web access to appointing and health care information • Maintain high clinical quality • Exploit new technology • Optimize Military Treatment Facilities
3. Promote preventive health care	• Emphasize population health by primary care managers • Increase focus on disease management
4. Operate a streamlined, coordinated and integrated health care system	• Establish full-time empowered lead agent • Introduce a new contracting platform
5. Utilize performance metrics	• Utilize the following performance and outcome based measures will help gauge our progress toward achieving a World Class Health Care System: Overall patient satisfaction; Meeting established access standards; Patient satisfaction with access; Hit rates on eHealth site; Primary care manager "by name" rates; Provider productivity, and Preventive services rates (mammography, pap smears, etc.)

tary operations worldwide:

★ Maintain medical readiness status

★ Conduct a Total Force Medical Personnel Zero Base Review to address medical recruitment, retention, training, shape of the force, and specialty mix issues

★ Fully fund the Military Health Care System.

Goal 2. Meet beneficiaries' expectations for quality and access:

★ Maintain high clinical quality, and exploit new technology

★ Meet access standards, and improve appointing

★ Optimize military treatment facilities

★ Introduce Internet access to appointments and health care information.

Goal 3. Promote preventive health care:

★ Emphasize population health by primary care managers

★ Increase the focus on disease management.

Goal 4. Operate a streamlined, coordinated, and integrated health care system:

★ Strengthen the TRICARE management structure

★ Establish a full-time, empowered TRICARE Regional Director

★ Move to a new contracting platform for purchased care

★ Realign funding for military personnel from the Service MILPERS accounts to the Defense Health Program O&M account.

Goal 5. Utilize performance metrics to evaluate and manage our system.

8.5   SUPPORTING RESEARCH

"The Defense Medical Oversight Committee's Review of TRICARE," KPMG Consulting

"Reorganizing the MHS: Should There Be a Joint Command?" The RAND Corporation

Joint Staff Quadrennial Defense Review preparation phase.

8.6   MEASURES

The team recommends using the following to measure progress toward implementation of the team's recommendations and achievement of its goals:

★ Overall patient satisfaction

★ Extent to which established access standards are met

★ Patient satisfaction with access

★ Access to an eHealth Web site

★ Primary care manager "by name" rates

★ Provider productivity

★ Rate at which preventive services (e.g., mammography) are used.

8.7   CURRENT POLICIES

See Appendix D for a listing of current policies related to health care.

8.8 LEGISLATIVE CHANGES REQUIRED

None identified.

**HEALTH CARE
TEAM MEMBERS**

– Team Leader: Ron Richards, OSD (HA)
– Army: COL Randy Randolph
– Navy: CAPT Vince Musache
– Air Force: COL Steve Waller, LtCol Douglas Anderson
– Marine Corps: CAPT Roger Edwards
– OSD (RA): COL Kate Woody

9A.   HOUSING: IMPROVING ACCESS TO PRIVATE SECTOR HOUSING

9A.1 VISION

Military families will have information and access to available private sector housing before departing a duty location. Service members will use an automated, Web-based housing referral system to locate available housing and community information prior to a Permanent Change of Station (PCS) move.

9A.2 SCOPE

Provide military transferees and families with Internet-accessible information on currently available housing units for rent near installations throughout the United States.

9A.3 PROCESS

Based on the results of the following efforts, we developed a statement of work for a contractor to develop an automated housing referral system:

★ Site visits at installations' Military Housing Offices

★ Briefings from Services on their housing referral efforts

★ Monthly Installation Policy Board meetings and quarterly Housing Policy Panel meetings

★ Congressional inquiries

★ Participation in the PCS Reengineering Work-group, which identified the problems with housing military members, especially in the community.

IMPROVING ACCESS TO PRIVATE SECTOR HOUSING

Current Barriers...

- PCS moves are frequent and stressful.

- Limited and diverse capability for military families to house hunt at gaining location.

- Military families competitively disadvantaged in seeking private sector housing.

- Referral services vary by Service and installation.

- Installations generally lack adequate technical tools, personnel resources and financial support.

- Accuracy of BAH is hampered by a lack of integrated private sector housing availability data.

Tomorrow's Programs, Policies and Procedures Must...

- Provide more reliable, accurate systems across and within Services to reduce stress related with PCS and house hunting efforts.

- Provide an electronic solution for military families seeking housing at gaining locations (before leaving current duty station).

- Partner with private sector businesses to leverage experience and capital.

- Support the allowance and requirements determination processes by providing current price and availability statistics.

9A.4 GOALS

The team developed four goals to accomplish in making the improved access to housing vision a reality.

Goal 1. Enhance the capability of military families to identify suitable, affordable private sector housing

"Improving Access to Private Sector Housing"

VISION: Military families will have information and access to available private sector housing before departing a duty location. Service members would use an automated, Web-based housing referral system to locate available housing and community information prior to PCS.

ISSUE: Difficulties in locating safe, adequate private sector housing negatively impact retention and quality of life of military families.

GOALS	SHORT-TERM (0-2 yrs.)

1. Enhance capability of military families to identify suitable, affordable private sector housing.	• Internet-based system
	• On-line tutorial
	• Secure quality rental housing before PCS
	   – Reduce storage time of household goods
	   – Reduce stress related to PCS and house hunting

2. Integrate housing availability data with Basic Allowance for Housing system.	• Internet-based system • Similar data elements and rules
3. Partner with local realtors to provide pre-screened housing to military (become renter of choice).	• Access to stable client base • Maintain current and reliable inventory data base of rental property
4. Provide a consistent, single tool for installation housing managers.	• Internet-based system and manager training • Upgrade existing automated system • Eliminate outdated housing lists • Efficient use of resources to provide other housing assistance

Housing Satisfaction – Off-base vs On-base
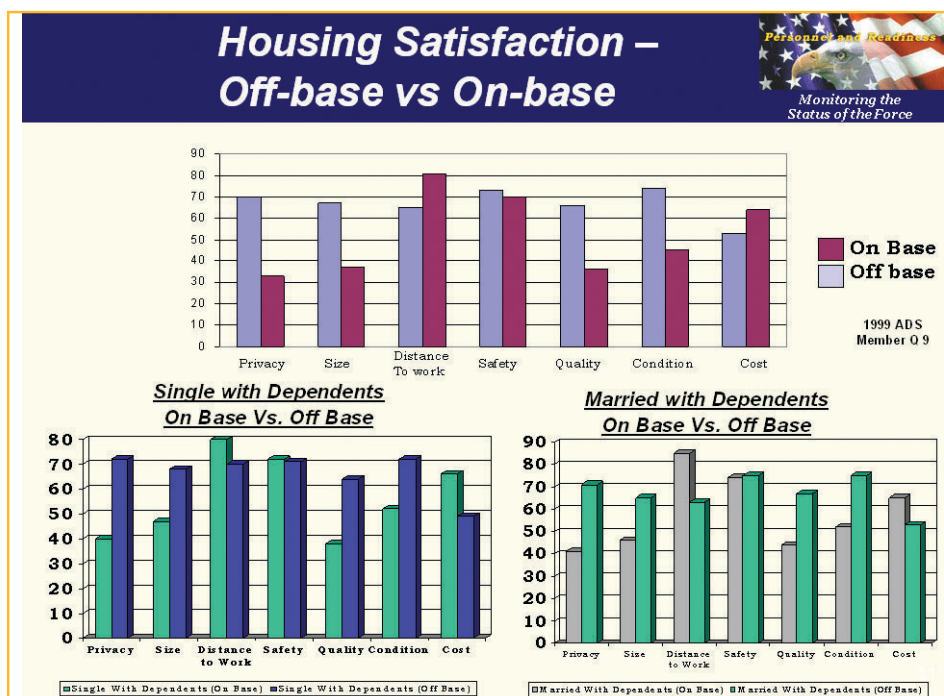
Goal 2. Integrate housing availability data with the Basic Allowance for Housing System

Goal 3. Partner with local realtors to provide pre-screened housing to military (that is, become the renter of choice)

Goal 4. Provide a consistent, single tool for installation housing managers.

9A.5 SUPPORTING RESEARCH

Cheal, D. (1996). "New poverty: Families in post modern society." Westpourt, CT: Greenwood Press.

Chi, P. S. K., & Laquatra, J. (1998). "Profiles of housing cost burden in the United States." Journal of Family and Economic Issues, 19, 175-193.

Lloyd, K. M., & South, S. J. (1996). "Contextual influences on young men's transition to first marriage." Social Forces, 74, 1097-1119.

Mirowsky, J., & Ross, C. E. (1999). "Economic hardship across the life course." American Sociological Review, 64, 548:569.

South, S. J., & Crowder, K. D. (1997). "Escaping distressed neighborhoods: Individual, community, and metropolitan influences." American Journal of Sociology, 102, 1040.1084.

Rohe, W. M., & Basolo, V. (1997). "Long-term affects of home ownership on self-perceptions and social interaction of low-income persons." Environment and Behavior, 29, 793-819.
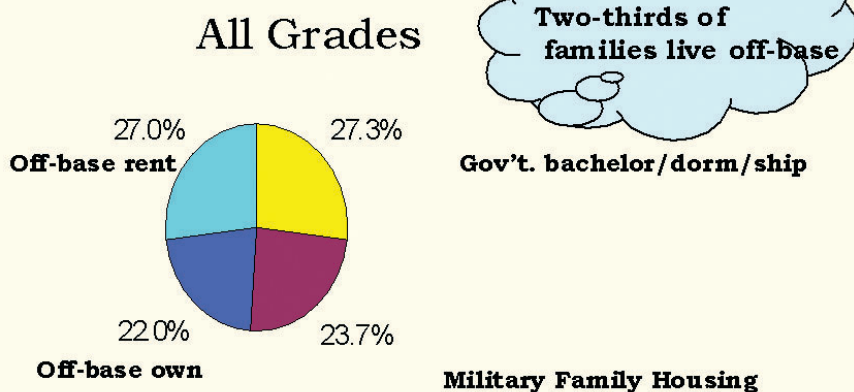
Additional Research:

★ Marsh Quality of Life Panel Report, October 1995

★ House Report 105-532 accompanying the Strom Thurmond National Defense Authorization Act for Fiscal Year 1999

★ Military Family Housing Referral Services and The Set-Aside Program Report, December 17, 1999

Housing Overview – **Off-base vs. On-base**

All Grades

27.0% — Off-base rent
27.3% — Gov't. bachelor/dorm/ship
22.0% — Off-base own
23.7% — Military Family Housing

Two-thirds of families live off-base

Of the Total Force – Half live off-base and half on-base

1999 ADS

9A.6 MEASURES

★ Develop survey to research and develop a monitoring system

★ Measure number of inadequate units in DoD's housing inventory

★ Improvement and maintenance.

9A.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to housing.

9A.8 LEGISLATIVE CHANGES REQUIRED

None identified.

IMPROVING ACCESS TO PRIVATE SECTOR HOUSING TEAM MEMBERS

– Team Leader: Mike McAndrew, OSD
– OSD: Phyllis Newton
– Army: George McKimmie
– Navy: Steve Keating
– Air Force: Col Steve Zander
– Marine Corps: Karen Ayers
– Contractor: Runzheimer Intl (Adlore Chaudier, Allan Bateson)

9B. ESTABLISHING A RENOVATION STANDARD

9B.1 VISION

Where the private sector housing market cannot provide sufficient housing for military families, DoD will provide safe, adequate housing through military construction or privatization.
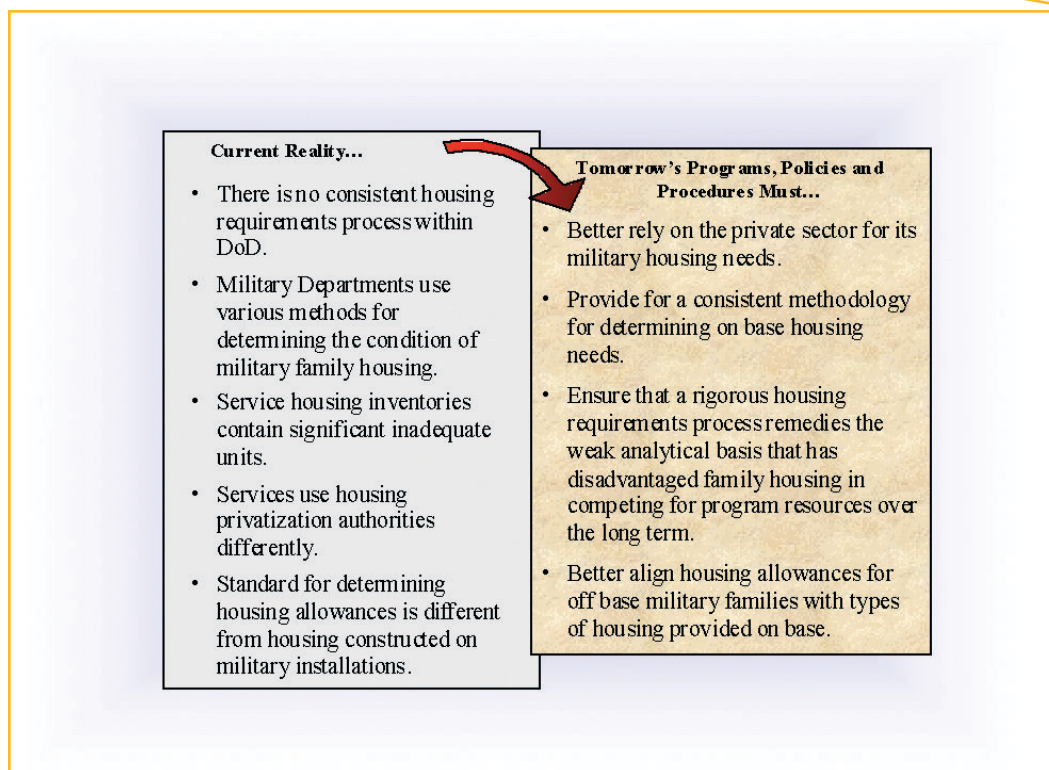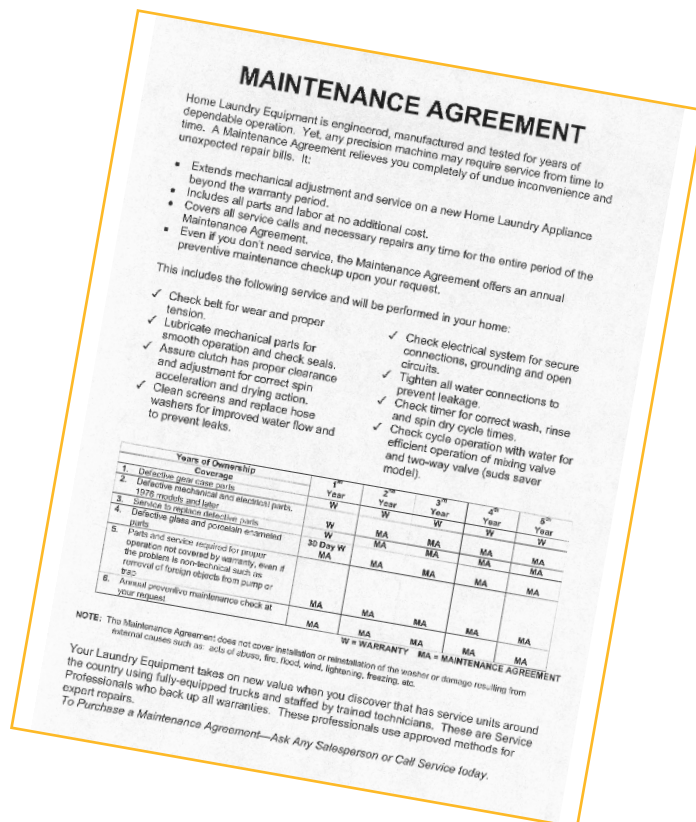
9B.2 SCOPE

The focus of this functional area is on providing adequate housing inventory through revitalization, demolition or privatization.

9B.3 PROCESS

9B.4 GOALS

The team developed three goals needed to make the Establishing a Renovation Housing Standard vision a reality.

Goal 1. Develop a consistent process for determining family housing requirements

Current Reality...

- There is no consistent housing requirements process within DoD.
- Military Departments use various methods for determining the condition of military family housing.
- Service housing inventories contain significant inadequate units.
- Services use housing privatization authorities differently.
- Standard for determining housing allowances is different from housing constructed on military installations.

Tomorrow's Programs, Policies and Procedures Must...

- Better rely on the private sector for its military housing needs.
- Provide for a consistent methodology for determining on base housing needs.
- Ensure that a rigorous housing requirements process remedies the weak analytical basis that has disadvantaged family housing in competing for program resources over the long term.
- Better align housing allowances for off base military families with types of housing provided on base.

"Establishing a Renovation Standard"

VISION: Where the private sector housing market cannot provide sufficient housing for military families, DoD will provide safe, adequate housing through military construction or privatization.

ISSUE: Military Departments maintain large inventories of inadequate housing. The Department's goal is to eliminate the inadequate housing inventory by 2007 through revitalization, demolition or privatization.

GOALS	SHORT-TERM (0-2 yrs.)	MID-TERM (3-5 yrs.)
1. Develop a consistent family housing requirements determination process.	• Coordinate and issue housing requirements determination policy • Develop implementation guidance, software and instructions	
2. Eliminate inadequate family housing by 2007 through revitalization, demolition or privatization.	• Family Housing Master Plans • Monitor progress toward goal through PPBS reviews • Permanent housing privatization authority	
3. Review housing standard (type of dwelling/number of bedrooms) with housing allowances and construction standards.		• If appropriate, establish a consistent housing standard (type and number of bedrooms) for use in determining housing allowances and family housing construction requirements

Goal 2. Eliminate inadequate family housing by 2007 through revitalization, demolition, or privatization

Goal 3. Review the housing standard (type of dwelling/number of bedrooms) with housing allowances and construction standards.

9B.5 MEASURES

Number of inadequate units in DoD's housing inventory.

9B.6 RESEARCH

Cheal, D. (1996). "New poverty: Families in post modern society." Westpourt, CT: Greenwood Press.

Chi, P. S. K., & Laquatra, J. (1998). "Profiles of housing cost burden in the United States." Journal of Family and Economic Issues, 19, 175-193.

Lloyd, K. M., & South, S. J. (1996). "Contextual influences on young men's transition to first marriage." Social Forces, 74, 1097-1119.

Mirowsky, J., & Ross, C. E. (1999). "Economic hardship across the life course." American Sociological Review, 64, 548:569.

South, S. J., & Crowder, K. D. (1997). "Escaping distressed neighborhoods: Individual, community, and metropolitan influences." American Journal of Sociology, 102, 1040.1084.

Rohe, W. M., & Basolo, V. (1997). "Long-term affects of the homeownership on self-perceptions and social interaction of low-income persons." Environment and Behavior, 29, 793-819.

9B.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to housing.

9B.8 LEGISLATIVE CHANGES REQUIRED

None identified

ESTABLISHING A RENOVATION
STANDARD TEAM MEMBERS

- Team Leader: Mike McAndrew, OSD
- OSD: Phyllis Newton
- Army: George McKimmie
- Navy: Steve Keating
- Air Force: Col Steve Zander
- Marine Corps: Karen Ayers

10. FITNESS AND RECREATION OPPORTUNITIES

10.1 FITNESS VISION

A culture that fully integrates health and fitness into the everyday life and mission of the military community, making the Department of Defense (DoD) the national leader in health and fitness-fit for life, fit for mission.

10.2 FITNESS SCOPE

Programs that can impact health and fitness are currently managed by three separate staffs: health promotions, fitness and physical training. As a result, expertise is not shared, service to the customer lacks continuity, and programs are focused on limited goals with limited application of data to evaluate and design interventions. Additionally, programs are not staffed by professionals in all areas and are not provided adequate resources to maintain quality infrastructure. By developing a collaborative effort, there is potential to build programs that can aid in creating a fitness culture within DoD.

10.3 FITNESS PROCESS

Representatives from ODASD(MC&FP), Army DCS Operations, Army Community and Family Support Center, U.S. Army Center for Health Promotion and Preventive Medicine, Navy N65, Navy Environmental Health, Navy Bradley Branch Medical Center, Air Force Services, Air Force Medical Operations Agency, and Marine Corps Community Services developed the Fitness and Health Promotion Strategic Plan that was the basis for the fitness Social Compact.

10.4 FITNESS GOALS

Goal 1. Build a strong partnership among health, fitness and training personnel. Due to the nature of their missions, many installation-level fitness, health promotion and physical training staffs are currently working together to provide programs and services that

Fitness Opportunities

Current Barriers...

- DoD spends $600 - $750 million and DVA $4.08 billion per year on musculoskeletal disabilities.
- Army Safety Center reports sports as the largest contributor to personnel injury.
- Most at risk are those in poorest physical condition.
- Programs that can impact health and fitness are managed by three separate staffs: health promotions, fitness and physical training. As a result:
    - Expertise is not shared.
    - Service to the customer lacks continuity.
    - Programs are focused on limited goals, with limited application of data to evaluate programs and design interventions.
- Programs are not staffed by professionals in all areas and are not provided adequate resources to maintain quality infrastructure.

Policies and initiatives that will encourage change...

- Collaborate on health, fitness and physical training to provide a combined approach:
    - Continuity for customers.
    - Collaborative design of health, fitness and physical training programs that can have an impact on physical readiness and injury prevention.
- Focus on mission and community needs, designing programs that answer identified requirements.
- Emphasize the use of information to evaluate programs and design interventions.
- Market the documented benefits of fitness and health to commanders and communities to gain their support.
- Improve the level of professionalism and provide quality infrastructure that supports the staff in delivering quality programs.

focus on the full fitness needs of service members and their families. Many of these installations are providing a "one-stop shop" for information and assistance. These working relationships need to be formalized through full recognition at higher headquarters and institutionalized through policy and integrated processes that emphasize this kind of effective collaboration. Policies and procedures can be initially adapted from successful programs in the field, with further policy development through research into best practices and benchmarks.

Goal 2. Through surveillance efforts, identify pathways to reach a healthy, fit force. Research is key to increasing the understanding of the potential benefits of fitness to mission effectiveness. The military Services are collect-

"Fitness Opportunities"

VISION: A culture that fully integrates health and fitness into the everyday life and mission of the military community, making DoD the national leader in health and fitness—fit for life, fit for mission.

ISSUE: Fitness, health promotion and physical training produces less support separately than as a team.

Goals	Short Term: 0-7 years	Mid Term: 10 years	Long Term: 20 years
1. Build a strong partnership among health, fitness and training personnel.	• Formalize relationships through working groups and integrating processes at the installation level. • Conduct research into best practices and benchmarks.	• Health, fitness and training professionals depend on each other's expertise and offer a seamless service.	• The three disciplines work as a cohesive organization seeking out mission and community needs.
2. Through surveillance efforts, identify pathways to reach a healthy, fit force.	• Research existing Service surveillance systems. • Measure importance of fitness. • Build interventions. • Assess effectiveness of change.	• Interventions are defined and assessed through fact-based processes.	• Programs are focused on emerging needs identified through surveillance.
3. Provide quality health and fitness programs.	• Staff according to professional guidelines. • Train according to professional guidance. • Equip according to Service standards. • Construct standardized colocated fitness/health promotion facilities.	• Professional guidelines determine standards. • Programs are certified to meet professional guidelines.	• Programs are managed by professionals, supported by quality infrastructure.
4. Focus our programs on enhancing readiness and mission capability.	• Reduce incidence/severity of musculoskeletal injuries. • Deliver targeted fitness and health training. • Ensure all fitness standards are science-based.	• Most avoidable injuries have been eliminated. • Training is targeting at enhancing mission capability.	• Commanders seek out the health/fitness/physical training team to resolve issues
5. Integrate fitness/health into military culture.	• Inform leadership of the benefits. • Promote the benefits to all levels of the military community. • Integrate into training, military standards and PME. • Create a conducive environment. • Integrate into the military lifecycle.	• Fitness is an integrated component of military life. • Barriers to achieving fitness have been eliminated	• Fitness is a common way of life for service members and their families.

ing some information and conducting impressive studies that demonstrate the impact of collaborative approaches towards health, fitness and physical training; however, a more systematic approach is needed. Through research, additional opportunities and interventions can be developed that can reduce unnecessary costs and increase the quality of life for service members and their families. By publishing the outcome of these interventions, military leadership and military communities can become more aware of the potential for maintaining a fit force.

Goal 3. Provide quality health and fitness programs. Surveys have shown that fitness remains the number one Morale, Welfare and Recreation (MWR) program. Service members consistently vote fitness as being their most important recreational benefit. They have also voiced their concern for having quality programs. DoD has established standards for fitness programs in the areas of services, staffing, training, equipment and facilities. Since 1999, the military Services have annually evaluated their progress toward meeting these standards. Through standards, they have focused attention and resources towards improving infrastructure and capabilities.

Goal 4. Focus our programs on enhancing readiness and mission capability. Initial research has shown that by employing the preventive characteristics of physical fitness, the incidents of musculoskeletal injuries can be reduced, and, as a result, mission accomplishment increases. In addition, by targeting fitness and health programs, mission effectiveness can be increased in the same way an athlete improves performance through physical training. Through the collaborative efforts of health promotions, fitness and physical training specialists, programs can be designed to improve performance while sustaining the recreational aspects of fitness.

Goal 5. Integrate fitness/health into military culture. Fitness is already recognized as a critical element of military readiness, but it is not necessarily an integral part of military culture. Currently, fitness has a varying degree of importance, depending on an individual's military specialty; however, there are benefits to be gained by the entire military community through fitness. By creating a conducive environment for fitness, what is now recognized as important can become a more integrated part of military life. As a result, fitness can produce dividends in terms of increased productivity and reduced health care costs.

10. FITNESS AND RECREATION OPPORTUNITIES

10.5 SUPPORTING FITNESS RESEARCH

Bumgardner, W., & Sharpless, D. (1984). "Educating the military recreator." Parks and Recreation, 19, 43-45.

Crompton, J.L., & MacKay, K.J. (1989). "Users' perceptions of the relative importance of service quality dimensions in selected public recreation programs." Leisure Sciences, 11, 367-375.

Downs, J.P. (1983). "Planning and marketing: Two keys to a recreation center's success." Parks and Recreation, 18, 30-34.

Marans, R.W., & Mohai, P. (1991). Leisure resources, recreation activity, and the quality of life." In B.L. Driver, P.J. Brown, G.L. Peterson (Eds.), Benefits of Leisure (pp. 351-363). State College, PA: Venture Publishing Inc.

ADDITIONAL RESEARCH:

According to the Atlas of Injuries in the U.S. Armed Forces, the Department of Defense (DoD) spends $600 - $750 million, and Department of Veterans Affairs $4.08 billion, per year on musculo-skeletal disabilities per year. Also, according to the Atlas, the Army Safety Center reports sports as the largest contributor to personnel injury. Most at risk are those in poorest physical condition. With current fitness training policies, and fitness opportunities, musculoskeletal injuries pose a significant cost to DoD, with many of the causes (such as sports and physical training) within the Department's control.

Research conducted by Dr. Joseph Knapik, U.S. Army Center For Health Promotion And Preventive Medicine, has shown the impact of effective use of fitness in reducing the incidents of injuries in basic and advanced training. In his test at basic training, the experimental training company had 24.3 percent fewer injuries than the control training company, and had an 82 percent first-time pass rate of the Army Physical Fitness test as opposed to a 76 percent pass rate in the control group.

10.6 FITNESS MEASURES

★ Track the number of programs that have formalized partnership programs. In addition to tracking the number of installation-level partnerships, a system for evaluating collaborative programs will be needed to determine benchmarks and best practices.

FITNESS TEAM MEMBERS

- – Team Leader: Col Marcus Beauregard, OSD (MC&FP)
- – Army: Janet MacKinnon
- – Navy: Kelly Powell
- – Air Force: Capt John Cronin
- – Marine Corps: Cathy Ficadenti
- – OSD: Bill Gleason

★ Compare fitness levels, weight control compliance, completion of physical training, and other behavior interventions to existing levels to measure the impact of collaborative fitness-health-physical training programs.

★ Measure compliance with established standards to assess the quality of fitness programs. Track funding, such as funding for military construction, to determine the level of commitment the military Services are making to improving quality.

★ Measure the reduction in costs associated with musculoskeletal injuries to obtain an estimate on the productivity of specific initiatives and to pinpoint the source of injuries.

★ Track leadership and military community attitudes toward the role fitness plays in their personal and family lives and in the life of their community.

★ Service member satisfaction with fitness program opportunities.

10.7 CURRENT FITNESS POLICIES

See Appendix D for a listing of current policies related to fitness and recreational opportunities.

10.8 FITNESS LEGISLATIVE CHANGES REQUIRED

None Identified.

10A. RECREATION VISION

10A.1 RECREATION VISION

Provide recreation programs and services that meet customer expectations and support mission requirements through delivery methods that evolve to keep pace with customers and changes in the environment.

10A.2 RECREATION SCOPE

Recreation programs have remained in approximately the same configuration for the past 20 years. Often, these programs have focused on sustaining on-base operations and not on impacting the entire military community. By their nature, they have remained bound by their infrastructure, evolving slowly while community needs and social trends have moved at a faster pace. To change this cycle, recreation program managers need to provide programs that take full advantage of alternative delivery systems and that are focused on community-based outcomes.

10A.3 RECREATION PROCESS

Representatives from ODASD(MC&FP), Army Community and Family Support Center, Navy N65, Air Force Services, and Marine Corps Community Services developed the recreation opportunity social compact.

10A.4 RECREATION GOALS

The team developed four goals to achieve in making the Recreational Opportunities vision a reality.

Goal 1. Provide programs and services that are part of the commander's mission effectiveness tools. Key to the transformation of current recreation programs will be the institution of programming that focuses on community outcomes. Program managers will need to learn new skills to craft effective programming as well as new information processes to track the outcome of their efforts. Commanders will need to be familiar with using recreation to improve specific aspects of the community, so recreation programs can be employed effectively and efficiently to meet community needs.

Goal 4. Develop processes that focus on outcomes and emerging trends. Efficiently bringing innovations to recreation programs to meet emerging community needs may require non-traditional approaches to implementation. For example, approximately 66 percent of service members and their families live off of the installation. To provide recreational programs located in close proximity to where they live, programs may need to be provided through partnership or some other method of service delivery.

Some programs may not warrant a large capital investment and may be more appropriately provided through a third party. In all these cases, program managers need instruction and flexibility to employ non-traditional processes to obtain programs and services wanted by the military community.

10A.5 SUPPORTING RECREATION RESEARCH

Bumgardner, W., & Sharpless, D. (1984). "Educating the military recreator." Parks and Recreation, 19, 43-45.

Crompton, J.L., & MacKay, K.J. (1989). "Users' perceptions of the relative importance of service quality dimensions in selected public recreation programs." Leisure Sciences, 11, 367-375.

Downs, J.P. (1983). "Planning and marketing: Two keys to a recreation center's success." Parks and Recreation, 18, 30-34.

Marans, R.W., & Mohai, P. (1991). "Leisure resources, recreation activity, and the quality of life." In B.L. Driver, P.J. Brown, G.L. Peterson (Eds.), Benefits of leisure (pp. 351-363). State College, PA: Venture Publishing Inc.

Additional Research. The concept of measuring the output of recreation programs based on their impact on the community stems from research to support benefits-based programming. In 1991, a small group of park and recreation professionals, convened by Dr. B. L. Driver of the U.S. Department of Agriculture Forest Service, met to discuss benefits-based concepts for evaluating, measuring, promoting, and marketing park and recreation services. The Canadian Parks and Recreation Association moved forward and captured the essence of

Goal 2. Provide consistent quality service to meet customer expectations. Decentralized administration of recreation programs without standards has resulted in inconsistent program quality. To provide quality infrastructure that will meet customer expectations, a set of standards that outlines program requirements is needed. Rather than creating a new set of "cookie-cutter" programs throughout the Department of Defense (DoD), this approach will provide managers the support needed to respond more consistently to community needs.

Providing consistent quality is also dependent on the qualifications and skill of the program managers. Current personnel systems do not consistently provide highly qualified, highly motivated candidates ready to deliver programs with expected community outcomes. Expecting managers to be accredited by a national professional organization will establish a benchmark for quality management.

Goal 3. Identify emerging trends and reduce time required to implement change. The current process of program development hinders attempts to keep pace with emerging trends, customer expectations, and industry capabilities. As a result, customers often see recreation opportunities as "behind the times" and lacking customer focus. Current trend analyses, needs assessments, and resource allocation processes increase the cycle time required to implement a change to recreational programs. "Business-like" processes that bring emerging trends to military communities more quickly are needed to allow on-base programs to keep pace with their

10. FITNESS AND RECREATION OPPORTUNITIES

RECREATIONAL OPPORTUNITIES

Current Reality...

- Activities are focused on sustaining on-base operations and not on impacting the entire military community

- Programs have remained bound by their infrastructure and have not been responsive to changes in the environment

- Programs have had inconsistent quality

- Managers have lacked professional training to take full advantage of alternative delivery methods in providing service to the military community

- Programs have not been tied to outcome measures, and have had limited measurement tools available outside of financial performance

- As a result of these trends, recreation programs often have a reputation of "being in business to stay in business"

Policies and initiatives that will encourage change...

- Develop recreation program managers to provide programs that take full advantage of alternative delivery systems and that are focused on community-based outcomes

- Engage commanders in using recreation as a community enhancement tool by providing fact-based demonstrations of program output

- Require programs be funded according to standards

- Develop processes that can rapidly effect change to programs to take advantage of emerging trends and react to community needs

- Revise current budget processes to allow for more timely changes to programs

the concepts by publishing The Benefits Catalogue. Research identified benefits such as improved health, reduced loneliness, increased self-esteem, reduced stress, enhanced community spirit, and a more balanced productive life. A 12-week Outdoor Adventure Recreation Program resulted in increased resiliency skills, educational involvement, and job training. A study of fitness walkers during a 20-week walking regimen conclusively demonstrated health benefits such as increased cardiovascular health, decreased dependence on blood pressure medication, improved mobility, range of motion, strength and endurance. Participants also experienced increased coping skills, personal responsibility, socialization, optimism for the future, and self confidence. An after school program for youth resulted in significant increases in knowledge of neighborhood resources, high controls against deviant behavior, appreciation of role models, and perceived competence. In 1996, the National Recreation and Park Association (NRPA), with the support of the National Recreation Foundation, supported benefit-related research projects and created resource and training materials. NRPA formally created a Benefits Task Force to provide support to the benefits program and hired a full time coordinator. The benefits movement is actively promoted by NRPA and is widely accepted within the parks and recreation profession and agencies.

10A.6 RECREATION MEASURES

The team developed the following measures, each associated with one of the Recreational Opportunities goals, specifically for the Recreational Opportunities vision.

"Recreational Opportunities"

VISION: Provide recreation programs and services that meet customer expectations and support mission requirements through delivery methods that evolve to keep pace with customers and changes in the environment.

ISSUE: Delivery methods for current recreation and library programs are not changing to keep pace with customers and environmental changes.

Goals	Short-term: 0-7 years	Mid-term: 10 years	Long-term: 20 years
1. Provide programs and services that are part of the commander's mission effectiveness tools	• Implement outcome-based programming • Educate commanders on use of programs and services to enhance mission accomplishment • Educate customers on benefits of recreation	• Commanders view recreation as a tool to relieve community stresses • Customer are aware of the impact of recreation	• Recreation is focused and responsive to community issues • Customers seek out recreation to assist with life concerns
2. Provide consistent quality service to meet customer expectations	• Develop and apply standards for: • Programs and services • Facilities and equipment • Restructure staffing and training processes to develop professional management	• Programs meet basic infrastructure standards • Staff are professional and capable of flexible programming	• Programs have a quality infrastructure upon which to base programs desired by customers
3. Identify emerging trends and reduce time required to implement change	• Develop a process to identify emerging trends • Develop a process to fast-track implementation of emerging trends	• Management headquarter staffs identify trends and develop appropriate fast-track implementation vehicles	• Emerging trends match consumer demand from start to finish
4. Provide the necessary resources to sustain programs and services	• Take full advantage of partnerships and non-traditional methods of service delivery • Develop a budget process that can accommodate inputs from emerging trends and outcome-based programming in a timely manner • Fund according to standards and outcome-based program requirements	• All opportunities are considered in providing programs and services • Budget processes keep pace with the tempo of change • Funds are directed towards program output—staff functions stay lean	• Focus is on optimum service delivery • Budgets are based on life cycle of programs • Fast track funding is available to take advantage of emerging trends

★ Provide programs and services that are part of the commander's mission effectiveness tools. The aim of this goal is to position recreation programs to be more responsive to the needs of the community, as defined through data and feedback from installation leadership. Leadership makes final decisions on establishing interventions and providing resources to accomplish the effort. The leadership should also be involved in evaluating the effectiveness of the concept.

★ Consequently, the most appropriate measure of the effectiveness of this goal should come from commanders.

★ Provide consistent quality service to meet customer expectations. Current program management philosophy within the military Services is to obtain more consistent service through the application of standards. Measuring quality of services, programs, facilities, equipment, training, and staff will provide feedback on consistency of program execution.

★ Identify emerging trends and reduce time required to implement change. Current programs have an undetermined cycle time between concept approval and implementation. Facility projects are tracked to ensure they stay on track to be defined, designed, approved, funded, contracted and built on time. Similarly, programs should be tracked on a timeline to ensure changes are implemented in a timely manner from identification through establishing requirements in standards and implementation instructions, funding and procuring the necessary materials and training.

★ Develop processes that focus on outcomes and emerging trends. To focus on outcomes and emerging trends, recreational programs will require the necessary resources to develop adequate infrastructure to support these changes. By tying resources to standards, the amount needed to improve current programs to meet standards can be quantified. The amount of resources allocated to programs can be compared against the amount needed to sustain the level of quality mandated through standards.

10. FITNESS AND RECREATION OPPORTUNITIES

10A.7   CURRENT RECREATION POLICIES

See Appendix D for a listing of current policies related to fitness and recreational opportunities.

10A.8   RECREATION LEGISLATIVE CHANGES REQUIRED

Over the past three years, the military Services have developed and tested a resource allocation concept for Morale, Welfare and Recreation (MWR) programs referred to as the Uniform Resource Demonstration (URD). During the FY 2002 legislative cycle, DoD attempted to obtain legislation that would support further implementation of the URD. The concept allows the military Services to use non-appropriated fund (NAF) contracting and personnel rules to provide for services authorized support through appropriated funds (APFs). With this change, recreation program managers can streamline efforts to staff programs and obtain resources to support emerging trends.

RECREATIONAL OPPORTUNITIES TEAM MEMBERS

– Team Leader: Col Marcus Beauregard, OSD (MC&FP)
– Army: Greta Anderson
– Navy: Tom Yavorski
– Air Force: Capt John Cronin, Eliza Nesmith
– Marine Corps: Evonne Carawan
– OSD: Carol Potter, Bill Gleason

11. EMPLOYER SUPPORT FOR RESERVE FORCES

11.1 VISION

The Department of Defense, employers, and employees jointly embrace and enhance Guard and Reserve service to America. DoD, employers, and Guard and Reserve members work collaboratively in support of our Nation and its defense.
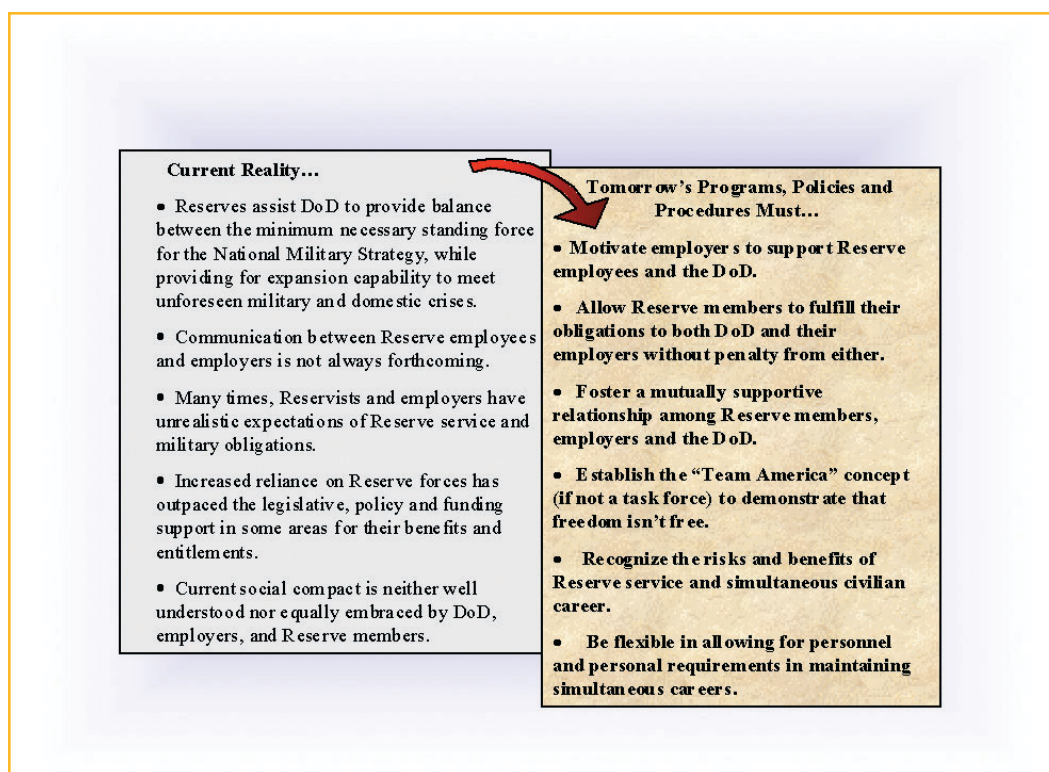
11.2 SCOPE

The scope of our goal encompasses all of DoD and the Services, as well as all employers across the U.S. and their current and potential Guard and Reserve employees. We see the mutually supportive relationship as the key to achieving the necessary compact for strengthening employer support of the Guard and Reserve.
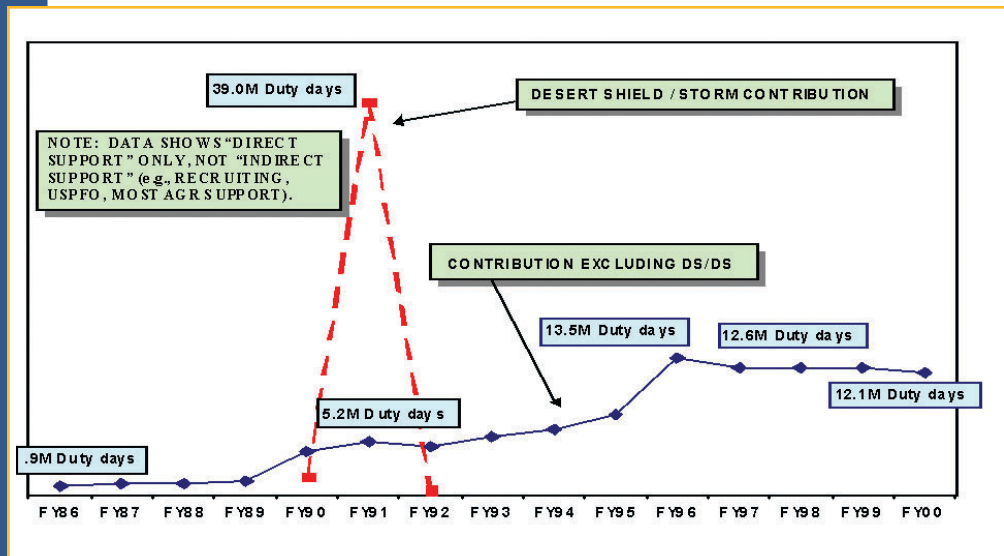
11.3 PROCESS

The team relied heavily on input, experience, and expertise from the Employer Support to the Guard and Reserve (ESGR) participants and staff. The deployment of Reserve and Guard service members since of 11 September 2001 have made it obvious

that we are dealing with an issue of significant impact for Reserve members and their employers.

Discussion focused on relationships among the DoD and employers, and Reserve Component members' impact on the national military strategy. It was readily apparent that there is a strong compact between the Reserve member and DoD, and the Reserve member and his employer, but there is less of a compact between DoD and the employers of the Reserve members. This three-way relationship tends to place more stress and focus on the Reserve member honoring the compact with DoD and with the employer than the other two parties and their compacts. The team soon reached consensus that the vision must be: *The Department of Defense, employers, and employees jointly embrace and enhance Guard and Reserve service to America. DoD, employers, and Guard and Reserve Members must work collaboratively in support of our Nation and its defense.* This vision incorporates the concept that freedom isn't free and all of us, as Americans, have a role to play and a price to pay in guaranteeing the future of the freedoms we enjoy and often take for granted.

Current Reality…

- Reserves assist DoD to provide balance between the minimum necessary standing force for the National Military Strategy, while providing for expansion capability to meet unforeseen military and domestic crises.

- Communication between Reserve employees and employers is not always forthcoming.

- Many times, Reservists and employers have unrealistic expectations of Reserve service and military obligations.

- Increased reliance on Reserve forces has outpaced the legislative, policy and funding support in some areas for their benefits and entitlements.

- Current social compact is neither well understood nor equally embraced by DoD, employers, and Reserve members.

Tomorrow's Programs, Policies and Procedures Must…

- Motivate employers to support Reserve employees and the DoD.

- Allow Reserve members to fulfill their obligations to both DoD and their employers without penalty from either.

- Foster a mutually supportive relationship among Reserve members, employers and the DoD.

- Establish the "Team America" concept (if not a task force) to demonstrate that freedom isn't free.

- Recognize the risks and benefits of Reserve service and simultaneous civilian career.

- Be flexible in allowing for personnel and personal requirements in maintaining simultaneous careers.

39.0M Duty days

DESERT SHIELD / STORM CONTRIBUTION

NOTE: DATA SHOWS "DIRECT SUPPORT" ONLY, NOT "INDIRECT SUPPORT" (e.g., RECRUITING, USPFO, MOST AGR SUPPORT).

CONTRIBUTION EXCLUDING DS/DS

13.5M Duty days   **12.6M Duty days**

12.1M Duty days

5.2M Duty days

.9M Duty days

FY86 FY87 FY88 FY89 FY90 FY91 FY92 FY93 FY94 FY95 FY96 FY97 FY98 FY99 FY00

Increasingly, we have come to rely heavily on our National Guard and Reserve, not just as Reserve forces in waiting but as critical contributors to the mission of the Total Force, serving extended tours away from their homes, families and jobs that present tremendous challenges to them and to their families.

11.4 GOALS

Goal 1. Employers, knowledgeable of rights and responsibilities, support Guard and Reserve employees and the DoD

Goal 2. Guard and Reserve members, knowledgeable of their rights and responsibilities, fulfill their obligations both to DoD and their employers

Goal 3. DoD fosters a mutually supportive relationship among Guard and Reserve members, employers, and the DoD.

Key milestones in accomplishing the goals include:

★ Establishing a "Team America" Task Force (a working group of military and civilian leaders to address employer issues and concerns)

★ Implementing a focused marketing effort to communicate with employers

★ Continuing to expand and encourage the use of an employer database to identify and foster communication with civilian employers of Guardsmen and Reservists.

11.5 SUPPORTING RESEARCH

Hazel Henderson, Jon Lickerman, and Patrice Flynn, Editors, "Calvert-Henderson Quality of Life Indicators," chapters 1 and 2, FLYNN RESEARCH, February 2000. These indicators address the first national, comprehensive assessment of the quality of life in the United States using a systems approach to better explain the rapid restructuring in our society and economy as a result of the twin forces of globalizing technology and markets moving us ever closer towards a seamless global economy.

"1999 Reserve Employer Survey Final Report," August 2000 Employer Support of National Guard and Reserve

"Training and Service: 1999 Survey of Employer Characteristics, Opinions, Attitudes and Behaviors." Rockville, MD: Westat, Inc. Wayne Hintze and John Rauch, Co-Project Directors

50 U. S. Code Appendix—"War and National Defense Act," Oct 17, 1940, CH. 888, 54 STAT. 1178. (Soldiers and Sailors Civil Relief Act.)

38 U.S.C. § § 4301 through 4333 (chapter 43), "Uniformed Services Employment and Reemployment Rights Act (USERRA)," (As enacted by Pub. Law 103-353, October 13, 1994)

"The Reserve Demographic Profile," Defense Manpower Data Center, February 2001.

"e-SGR: Creating a web-enabled employer interface," a progress briefing for Principal Deputy Assistant Secretary for Reserve Affairs, August 2001.

Toffler, A., & Toffler, H. (1994). "Creating a new civilization." Major Social Trends, Atlanta, GA: Turner Publishing.

"The FY 00 Ombudsman Top Ten Issue Comparison of 7,874 Total Cases," ESGR data.

"ESGR Partnership with the Council for Excellence in Government," Fellows Program Proposal, August 2000.

Most of the information dealt with during analysis and discussion was drawn from the personal and professional experiences of the participants and

"Strengthen Reserve Forces Employer Support"

VISION: The Department of Defense, employers, and employees jointly embrace and enhance Guard and Reserve service to America. DoD, employers, and Guard & Reserve members must work collaboratively in support of our Nation and its defense.

ISSUE: Relationships among the DoD, employers, and Reserve Component Members impact National Military Strategy

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Employers, knowledgeable of rights and responsibilities, support Guard and Reserve employees and the DoD.	• Establish National Employer Alliance • Establish "Team America" Task Force • Implement a focused marketing effort	• Facilitate relationships between DoD and American businesses • Assess/strengthen policies that address effects of mob and deployment on businesses	• Implement, manage, and maintain program milestones.
2. Guard and Reserve Members, knowledgeable of their rights and responsibilities, fulfill their obligations both to DoD and their employers.	• Establish IMA detachment for ESGR • Increase involvement of Selected Reserve in ESGR • ESGR Employer Awards to National status • ESGR PPB to OSD	• Explore alternative RC service. • Expand prime-time marketing and advertising. • Comprehensive Employer Outreach Strategy	• Implement, manage, and maintain milestones listed.
3. DoD fosters a mutually supportive relationship among Guard and Reserve Members, employers, and the DoD.	• ID key stakeholder groups to facilitate relationships between DoD, RC members and employers. • Communicate to RC & employers "realistic" RC member level of participation.	• Enhance perception of Guard & Reserve service (evolutionary process out to 20 years) • Provide Secretary level funding for initiatives presented	• Implement, manage, and maintain milestones listed.

ESGR staff members. However, the following are the sources of information accessed outside of the ESGR community:

Interview by COL Jim Scott with Mr. Jay Spiegel, Executive Director of the Reserve Officers Association, 25 September 2001.

Extract from the 2000 Military Exit Survey conducted by OSD/MPP. This survey provides information on attitudes and tendencies of active duty service members upon achieving their expiration of term of service (ETS).

11.6 MEASURES

★ Number of employers attending/participating in sponsored unit functions for employers and families

★ Attitudes and perceptions of employers toward RC employees (new survey to be developed, funded, and administered by USD/P&R with assistance from DMDC)

★ Number of substantiated complaints by RC members against employers

★ Number of targeted hits (identifying information inquiries, requests for assistance, etc.) by employers on ESGR Web site

★ Number of Guard and Reserve members leaving the military who cite employer problems

★ Retention rates of the RC and identification of reasons for nonretention as a result of employer conflicts

★ Number of, and reasons for, RC member calls to ESGR about rights and responsibilities

★ RC perceptions of their employer support of RC membership (survey)

★ Percent of mobilization "no show/no go" due to employer conflict

★ Attendance problems with training participation due to employer conflict

★ Number of ESGR/DoL substantiated employer complaints about short notice deployments

★ Number of employer contacts and "town hall meetings" initiated and implemented by DoD (focus on contacts at the State and local levels and with major employers in the area of each Reserve Center)

★ Effectiveness of new ESGR initiatives implemented as a result of the new Social Compact

★ Status of employer database

★ Percent of employers participating in employer support programs (identify models that exemplify the employer support paradigm of executing and resourcing employer support programs)

★ Effects of formal entry-level training on membership expectations

★ Changes in Guard and Reserve members' expectations as a result of new Social Compact initiatives

★ Changes in employer expectations of their Reserve employees' military participation as a result of the new Social Compact initiatives.

11.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to Reserve forces.

11.8 LEGISLATIVE CHANGES REQUIRED

None anticipated at this time. Research may be needed on ways to mitigate economic effects of mobilization on employers, especially small businesses, self-employed members, and professional practitioners (doctors, dentists, lawyers, et al.).

EMPLOYER SUPPORT FOR RESERVE FORCES TEAM MEMBERS

- Team Leader: COL Jim Scott, (OASD/RA)
- ESGR: CAPT Bart Buechner, LtCol King Gillespie, Other NCESGR SMEs, as req.
- OASD/RA: Maj Ian Ferguson
- Army Reserve: MAJ Scott Paradis
- Naval Reserve: CAPT Bill Couch
- Marine Corps: Maj Kirk Coker, Maj Mark Lockridge
- Air Force Reserve: Mr. Steve Landry
- Air National Guard: Col Cora Jackson, CMSgt Mark Waters
- Coast Guard Reserve: LCDR Linda Ingram

12.   SPOUSE EMPLOYMENT

12.1   VISION

A military spouse employment program that affords every spouse the opportunity to develop a career or become employed.

12.2   SCOPE

A robust, cohesive, standardized spouse employment program, with inter-agency and public partnerships to provide for training, career continuity, and retirement benefits for military spouse careerists, that is effectively marketed to potential customers and partners.

12.3   PROCESS

The Spouse Employment Team based their vision on the results of the 2000 Spouse Employment Summit. The Summit, which included spouses and spouse employment staff, defined spouse aspirations and targeted means of realizing them. Follow-up meetings by the team refined this material in the context of the new Social Compact.

12.4   GOALS

Goal 1. Implement a robust, cohesive program that provides a uniform level of standardized services

Current Reality...

• Many military personnel make retention decisions based on financial well-being.

• Since military spouses contribute more to their families' income than their civilian counterparts, spouse employment is key to the financial well-being of military families.

• Spouses face unique employment challenges, including frequent relocations.

• Relocations make it difficult to complete education, sustain a career, and amass retirement benefits.

Tomorrow's Programs, Policies and Procedures Must...

Ensure internal policies promote spouse employment goals.

• Provide a consistent level of services sufficient to support a robust, well-rounded program.

• Implement external partnerships to turn current spouse employment challenges to opportunities.

• Integrate military spouses into dislocated worker and training programs, and ensure their priority status with respect to federal telework opportunities.

• Activate and market a Web site to disseminate needed employment information.

• Address emerging issues and opportunities as they arise.

"Spouse Employment"

VISION: A military spouse employment program that affords every spouse the opportunity to develop a career or become employed.

ISSUE: Frequent moves affect the ability of military spouses to build careers & fiscal security.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Implement a robust, cohesive program that provides a uniform level of standardized services.	• Web site • Service benefits materials • Review of policies (including spouse preference) • Follow-on summit • Survey	• Assess programs. • Refresh Web sites. • Update polices as needed. • Surveys every five years. • Summit every five years.	• Assess programs. • Refresh Web sites. • Update policies as needed. • Surveys every five years. • Summit every five years.
2. Link military spouses to local training and employment opportunities.	• Link spouses to state and local One-Stop Employment Centers. • Take advantage of training programs offered to dislocated workers.	• Institutionalize military spouse employment into state, local and Dept of Labor workforce initiatives. • Track military spouse unemployment rate.	• Identify and track successful portable skill sets and careers to foster ongoing spouse career development.
3. Build partnerships within DoD and other Federal Agencies, nonprofit organizations and private corporations	• Implement partnership with Department of Labor. • Implement STEP partnership. • Pilot and assess corporate partnerships.	• Assess and expand partnerships as warranted.	• Implement and expand partnerships as warranted.
4. Effectively market the program to potential customers and partners.	• Web site • Service benefits materials • Pilot success stories • Directed marketing	• Web site • Service benefits materials • Pilot success stories • Directed marketing	• Web site • Service benefits materials • Pilot success stories • Directed marketing

Goal 2. Link military spouses to local training and employment opportunities

Goal 3. Build partnerships within DoD and other Federal agencies, nonprofit organizations, and private corporations

Goal 4. Effectively market the program to potential customers and partners.

12.5 SUPPORTING RESEARCH

Bowen, G. (1998). "Effects of leader support in the work unit on the relationship between work spillover and family adaptation." Journal of Family and Economics Issues, 19.

DMDC Report No. 99-007. (1999). "Effective strategies to assist spouses of junior enlisted members with employment." Arlington, VA: Defense Manpower Data Center.

DMDC Report No. 2000-003. (2000). "Analysis of comments from the 1997 survey of spouses of enlisted personnel." Arlington, VA: Defense Manpower Data Center.
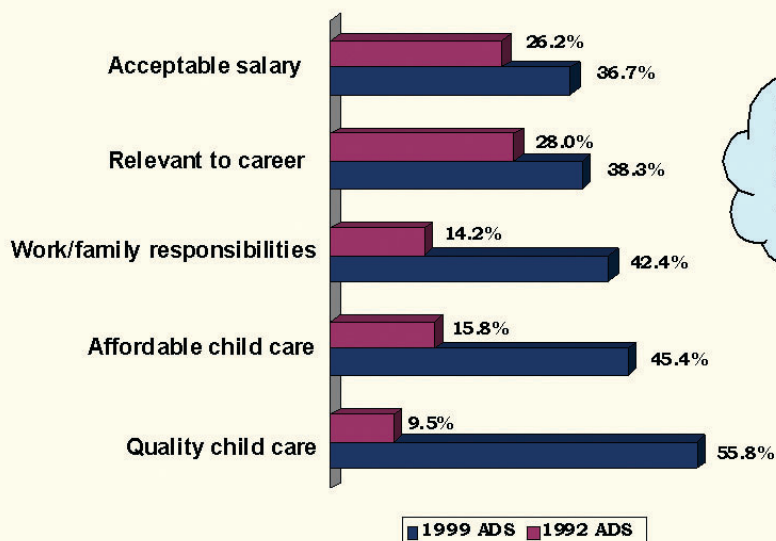
Fryer, D., & Payne, R. (1986). D. L. Cooper & I. Robertson (Eds.). "Being unemployed: A review of the literature on the psychological experience of unemployment." International Review of Industrial and Organizational Psychology. Chapter 8.

Obstacles to Spouse Employment

1999 Vs. 1992 Spouse Survey

Category	1992 ADS	1999 ADS
Acceptable salary	26.2%	36.7%
Relevant to career	28.0%	38.3%
Work/family responsibilities	14.2%	42.4%
Affordable child care	15.8%	45.4%
Quality child care	9.5%	55.8%

68.3% say they need money for basic family expenses—Very Important!

■ 1999 ADS ■ 1992 ADS

1999 ADS Spouse   1992 ADS Spouse

Greenhaus, J.H., & Beutell, N.J. (1985). "Sources of conflict between work and family roles." In B. C. Miller & D. H. Olson (Eds.), Family studies: Review yearbook, 299-319. Beverly Hills, CA: Sage.

Gill, H., & Haurin, D. (1998). "Wherever he may go: how wives affect their husband's career decisions." Social Science Research, 27, 264-279.

Jones, F., & Fletcher, B. (1996). "Taking work home: A study of daily fluctuations in work stressors, effects on moods and impacts on marital partners." Journal of Occupational and Organizational Psychology, 69, 89-106.

Larson, R., & Almeida, D. (1999). "Emotional transmission in the daily lives of families: A new paradigm for studying the family process." Journal of Marriage and Family, 61, 5-20.

Netemeyer, R., Boles, J., & McMurrian, R. (1996). "Development and validation of work-family conflict and family-work conflict scales." Journal of Applied Psychology, 81, 400-410.

Rubin, R. M., & Riney, B. J. (1994). "Working wives and dual-earner families." Westport, CT: Praeger.

Staines, G. (1980). "Spillover versus compensation: a review of literature on the relationship between work and non-work." Human Relations, 33, 111-129.

Zedeck, S. (1992). "Introduction: Exploring the domain of work and family concerns." In S. Zedeck (ed.) "Work, families, and organizations." San Francisco, CA: Jossey-Bass Publishers.

Other Research includes:

★ "Military Compensation in the Age of Two-Income Households," E. Casey Wardynski, May 2000

★ 1999 Active Duty Survey

★ 1997 Junior Enlisted Spouse Survey

★ Percentage of federal/DoD jobs filled by military spouses

★ Increased levels of spouse employment

★ Increasing levels of participation by potential partners

★ Increased levels of spouse enrollment and completion of voluntary education and certification programs

★ Increased levels of recruitment and retention throughout the Armed Forces

★ Reduced level of non-deployment as a result of family issues.

12.6 MEASURES

★ Implementation of standardized services and policy across Service lines

★ Implementation of a broad spectrum of partnerships

★ Increased levels of participation in Department Spouse Preference programs

12.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to spouse employment.

12.8 LEGISLATIVE CHANGES REQUIRED

Adapting Title 10, Section 1784 to encourage interagency and public/private partnerships.

SPOUSE EMPLOYMENT TEAM MEMBERS

– Team Leader: Jean Marie Ward, OSD (MC&FP)
– Army: Nancy Whitsett
– Navy: Susan Roberts, Ed Roscoe
– Air Force: Linda Stephens-Jones, Linda Brown
– Marine Corps: Erin Walerko, Antigone Doucette
– OSD: Beth Baird, Greg Pharr

13. TECHNOLOGY AND CONNECTIVITY

13.1 VISION

Enhance readiness and well-being of our Armed Forces, by utilizing state-of-the-art technology to provide service members and families the most convenient, immediate, efficient, and effective quality of life programs and services.

13.2 SCOPE

Quality of life information technology systems transfer from stovepipe entities to a seamless infrastructure.

13.3 PROCESS

Several team members had participated in the development of a Quality of Life Information Technology (QoLIT) strategic plan in February 2000. Work centered on the previous Qol IT strategic plan. Member also provided an overview of their Service IT initiatives and plans.

Today's Programs and Policies...

- Each Service implements their own QoL initiatives.
- Infrastructure and connectivity requirements for QoL programs need to be defined.
- Do not recognize differences between military and business missions.
- QoL activities are being "unplugged" from ".mil" domains at the installation level and valid QoL patrons are denied access to QoL systems.
- System certification and accreditation is a huge problem and differs across services.
- Funding of IT systems and staying current with new technological advances is a major challenge.
- A QoL IT baseline needs to be defined.
- Lack of communication regarding established systems and new IT systems.

Tomorrow's Programs, Policies and Procedures Must...

- Develop and implement an IT policy for QoL systems.
- Design and implement a QoL ISP outside the ".mil" domain.
- Design and implement a QoL enterprise portal.
- Provide all Service members and their families access to QoL enterprise portal via the QoL ISP architecture.
- Develop and implement security and authentication measures for a QoL enterprise portal.
- Fully fund the development, implementation and sustainment of the QoL ISP, enterprise portal, IT hardware and software.
- Establish and implement a QoL IT approval process.
- Establish a mechanism for communicating QoL IT initiatives that have been implemented and those under development.
- Develop a QoL IT baseline.
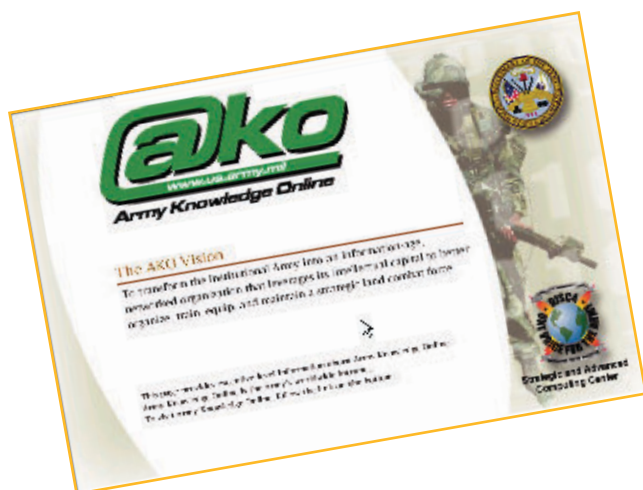
13.4 GOALS

Goal 1. Develop and implement connectivity to a global network

Goal 2. Standardize access and services

Goal 3. Embrace ongoing QoLIT development, implementation, research, and replacement.

13.5 SUPPORTING RESEARCH

Al-Gahtani, S. S., & King, M. (1999). "Attitudes, satisfaction and usage: Factors contributing to each in the acceptance of information technology." Behavior and Information Technology,18, 277-297.

Brass, D. J. (1985). "Technology and the structuring of jobs: Employee satisfaction, performance, and influence." Organizational Behavior and Human Decision Processes, 35, 216-240.

Kraut, R., Patterson, M., Lundmark, V., Kiesler, S., Mukophadhyay, T., & Scherlis, W. (1998). "Internet paradox: A social technology that reduces social involvement and psychological well-being?" American Psychologist, 53, 1017-1031.

Oravec, J. A. (2000). "Internet and computer technology hazards: Perspectives for family counseling." British Journal of Guidance and Counseling, 28, 309-324.

Vanderburg, W. H. (1983). "Some implications of modern technology for culture and knowledge." Man-Environment Systems, 13, 193-196.
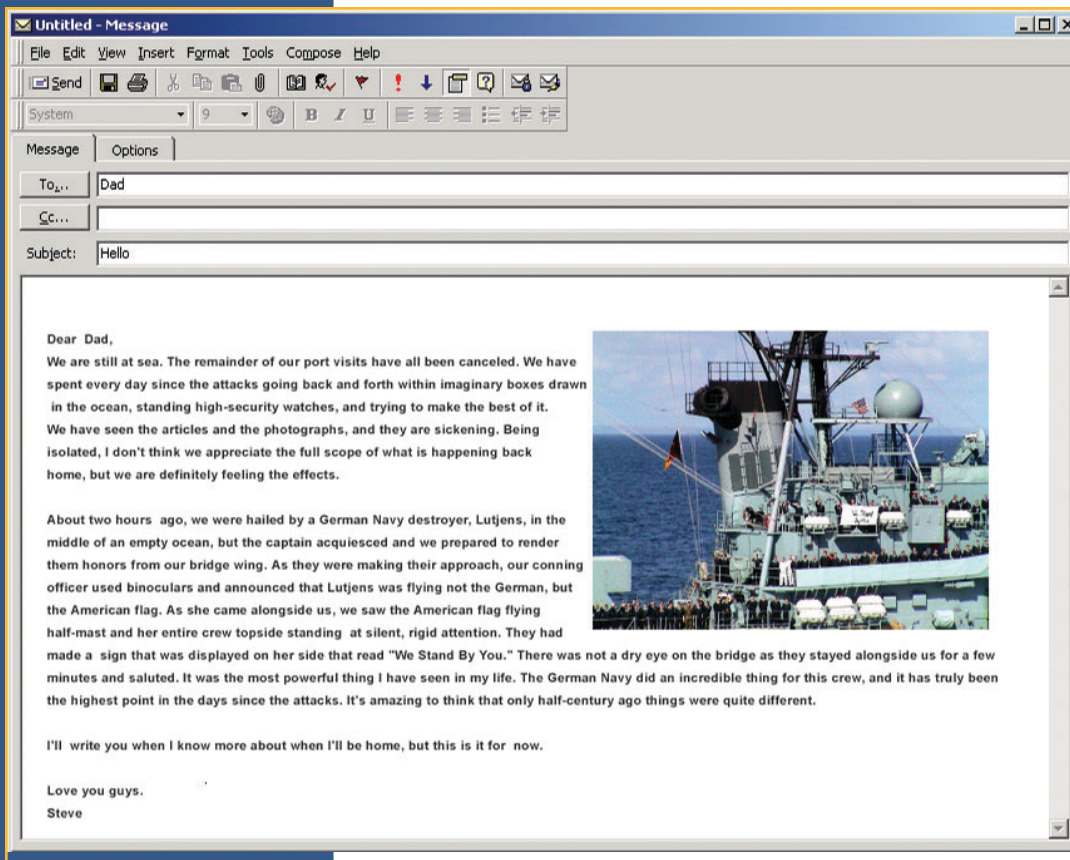
Wood, A. F., & Smith, M. J. (2001). "Online communication: Linking technology, identity, and culture." Mahwah, NJ: Erlbaum.

"Technology and Connectivity"

VISION: Enhance readiness and well-being of our Armed Forces through state-of-the-art technology by providing all members of the DoD community with the most convenient, immediate, efficient, and effective Quality of Life (QoL) programs and services.

ISSUE: QoL IT systems must transfer from stovepipe entities to a seamless consistent infrastructure.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Connectivity to a global network.	• Have a QoL ISP outside the ".mil" firewall for all services • Implement a QoL enterprise portal • Create a comprehensive base of QoL services on the Web • Provide connectivity to all QoL service	• Manual processes eliminated • E-Commerce • E-Business • E-Workforce • E-Learning technologies	
2. Standardization of access and services	• Access to QoL IT systems will be standard across services • Standard QoL IT policy • All DoD personnel will have feedback capabilities • QoL information will be consolidated.	Knowledge management Remote devices such as PDAs and cellular phones Wireless connection Virtual meetings	
3. Ongoing IT development, implementation, research and replacement.	• IT training is provided to senior management to enhance understanding of the potential for IT to contribute to the QoL mission and to corporate IT into the QoL financial planning process.	IT systems meet customers, staff, and management expectations and requirements.	

13.6 MEASURES

★ Connectivity provided to all QoL Services

★ QoLIT will be an integral part of DoD standards

★ QoLIT information will be consolidated

★ Complete an assessment of component QoLIT capabilities and plans

★ Create a QoL information technology policy encompassing management information, feedback and evaluation

★ A QoL IT group will be established to enhance communications within DoD and the Services to identify IT opportunities to reduce overlap, share resources, and ensure integrated delivery of IT services

★ Develop self-paced modular training

★ Provide basic computer literacy education for senior management and staff.

Dear Dad,

We are still at sea. The remainder of our port visits have all been canceled. We have spent every day since the attacks going back and forth within imaginary boxes drawn in the ocean, standing high-security watches, and trying to make the best of it. We have seen the articles and the photographs, and they are sickening. Being isolated, I don't think we appreciate the full scope of what is happening back home, but we are definitely feeling the effects.

About two hours ago, we were hailed by a German Navy destroyer, Lutjens, in the middle of an empty ocean, but the captain acquiesced and we prepared to render them honors from our bridge wing. As they were making their approach, our conning officer used binoculars and announced that Lutjens was flying not the German, but the American flag. As she came alongside us, we saw the American flag flying half-mast and her entire crew topside standing at silent, rigid attention. They had made a sign that was displayed on her side that read "We Stand By You." There was not a dry eye on the bridge as they stayed alongside us for a few minutes and saluted. It was the most powerful thing I have seen in my life. The German Navy did an incredible thing for this crew, and it has truly been the highest point in the days since the attacks. It's amazing to think that only half-century ago things were quite different.

I'll write you when I know more about when I'll be home, but this is it for now.

Love you guys.

Steve

13.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to communications and technology.

13.8 LEGISLATIVE CHANGES REQUIRED

None.

TECHNOLOGY AND CONNECTIVITY TEAM MEMBERS

- Team Leader: Ollie Smith OSD (MC&FP)
- Army: Rick Thomas
- Navy: Ed Pratt
- Air Force: Capt Chip Dunbar
- Marine Corps: Trevor Cornpropst
- DMDC: Robbie Brandewie

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14. TUITION ASSISTANCE AND DISTANCE LEARNING

14.1 VISION

Lifelong learning for the DoD Community: Enhanced readiness for the nation.

14.2 SCOPE

Tuition assistance policy and the availability of funds significantly affect vision fulfillment of service members and their families.

14.3 PROCESS

Team members built on a strategic plan developed in January 2001 for the Off-duty, Voluntary Education Program. Team members formed the nucleus of the committee that created the plan with the assistance of a contracted facilitator. Work on the Social Compact centered on those previously deter-mined goals to increase the level of tuition assistance support and expand the use of distance learning.

14.4 GOALS

Goal 1. Re-establish monetary uniformity in tuition assistance and increase the level of support provided under current policy. (Pay all of the cost of tuition and related instructional costs, limited by a $250 credit cap and $4500 annual ceiling, for service members participating in voluntary education during off-duty hours.)

Goal 2. Ensure that members are informed about distance learning opportunities, especially those available on line.

Goal 3. Ensure that service members have the hardware, software and connectivity to participate in

Voluntary Education

Monitoring the Status of the Force

End Strength vs Service Members Using TA

12%

20%

- End Strength
- Members Using TA

Users of TA, as a percentage of the active force, has grown during downsizing.

Annual TA Report

Degrees/Diplomas Earned (FY 00)

High School/GED 138

Masters 4,289

Doctorates 15

Bachelors 6,556

Associates Degree 16,112
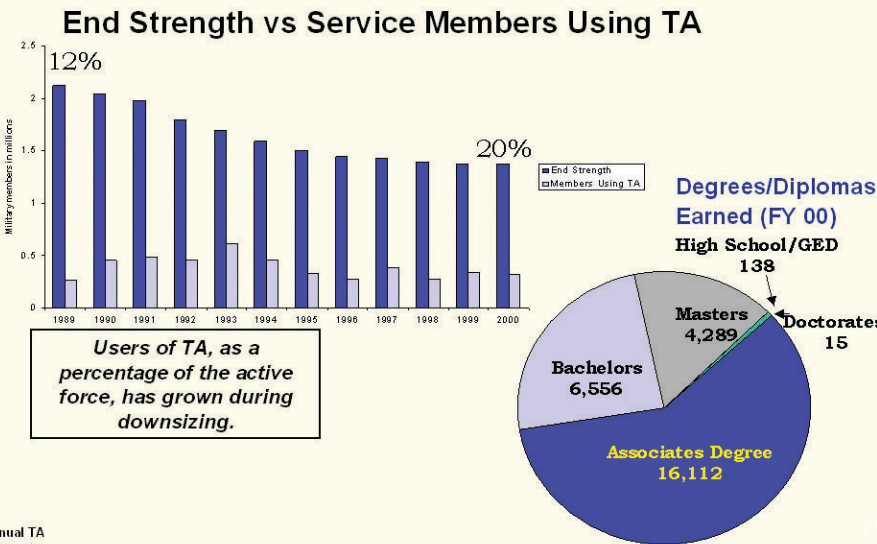
courses and programs offered via distance learning.

14.5 SUPPORTING RESEARCH

Bonk, C.J. & Wisher, R.A. (2000). "Applying collaborative and e-learning tools to military distance learning: A research framework." United States Army Research Institute for the Behavioral and Social Sciences, Technical Report 1107.

Wisher, R.A. & Curnow, C.K. (1998). "An approach to evaluating distance learning events." United States Army Research Institute for the Behavioral and Social Sciences Technical Report.

National Education Association. (1999). "What's the Difference?" A review of contemporary research on the effectiveness of distance learning in higher education. http://www.nea.org/achievement/student/details/02.html.

Current Policy provides for…

- Tuition assistance support at the 75 percent level. (Exceptions exist for participants in high school completion, Navy PACE, and eArmyU; also for those serving in contingency areas.)

- A course cap of $187.50 per credit which may discourage members from taking courses from institutions that charge more that $250 per credit.

- An annual ceiling, currently $3500, that prevents some members from taking courses they would otherwise have time to enroll and participate.

- Distance learning opportunities and support, but programs are not well-known and not all are easily accessible to members.

Tomorrow's Programs, Policies and Procedures must…

- Re-establish monetary uniformity and authorize payments for all tuition and expenses charged by an institution for off-duty, voluntary education and training.

- Raise the course cap to $250 per credit initially, and higher later.

- Increase the annual per member ceiling to $4500 initially, and higher later.

- Ensure that Members are better informed about distance learning opportunities, especially those available on line.

- Ensure that Service Members have the means to participate in courses and programs offered via distance learning. ("Means" = hardware, software, and connectivity.)

"Effectiveness of the Voluntary Education Program," Center for Naval Analysis, CRM 98-40 / April 1998. Findings: All elements of VOLED are cost effective. VOLED, supported by tuition assistance, improves retention of many of the best sailors and speeds up promotion significantly. Surveyed sailors requested greater command support for education.

"Climate and Quality of Life Survey," Department of the Air Force, February 2000. Findings: Major-ity of personnel surveyed said they are satisfied with educational opportunities in the Air Force. However, first and second term airmen and company grade officers reported they are less than satisfied. Regarding a question on mode of instructional delivery, most responded that they preferred "in residence" programs.

"Distance Education Survey," Distance Education and Training Council, May 1998. Findings: Ninety percent of students enrolled in DETC-member schools are employed at the time of enrollment. Thirty-one percent have tuition paid by employer. Average course completion time is nine months and course tuition ranged from $250 to $5,000.

"Recruitment-Related Research and Policy Briefing," collected research, OASD(FMP)/Military Personnel Policy. Findings: Education predicts retention; i.e., greater retention among those with earned diplomas. Available financial aid has not kept pace with increased tuition costs.

14.6 MEASURES

★ Monitor implementation by determining the number of participants and tuition assistance usage from year to year

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"Tuition Assistance and Distance Learning"

VISION: Lifelong Learning for the DoD Community: Enhanced Readiness for the Nation

</div>

ISSUE: Tuition Assistance policy and the availability of funds significantly affect vision fulfillment.

GOALS	SHORT-TERM (0-7 yrs.)	MID-TERM (10 yrs.)	LONG-TERM (20 yrs.)
1. Pay all of the charges of an educational institution for the tuition or expenses of members enrolled in that institution for education or training during off-duty periods.	•Pay tuition and expenses up to $250 course cap and $4,500 annual ceiling. •Expand the definition of "expenses" to cover books and other fees.	•Increase caps and ceilings to account for inflationary increases in charges.	•Eliminate course caps or annual ceilings or both.
2. Expand opportunities for members to complete tuition assistance supported studies using distance learning.	•Encourage studies in courses that require use of technology •Provide means for members to participate in on-line learning; i.e., hardware, software, and connectivity.	•Provide members with hardware/software that will enable members to participate in wireless distance learning.	
3. Grow and support a well-trained, diverse, fully-staffed workforce to meet educational needs of service members.	•Ensure education centers are fully staffed to meet the demands of members seeking informational, counseling, advising, and testing services.	•Provide on-line services that allow members to enroll in courses, receive counseling, and accomplish all administrative requirements online.	.

★ Number of semester hours (enrollment)

★ Monitor use of distance learning from year to year

★ Number of degrees earned

★ Amount of tuition assistance used quarterly

14.7 CURRENT POLICIES

See Appendix D for a listing of current policies related to voluntary education.

14.8   LEGISLATIVE CHANGES REQUIRED

None. Legislative authority for increasing tuition assistance was granted by Section 1602 of Public Law 106-398, National Defense Authorization Act for Fiscal Year 2001. It amended 10 U.S.C. 2007, which heretofore generally restricted tuition assistance to 75 percent of costs.

Policy that supports implementation already exists in DoD Directive 1322.8, Voluntary Education Programs for Military Personnel, and DoD Instruction 1322.25, Voluntary Education Programs.

TUITION ASSISTANCE AND DISTANCE LEARNING TEAM MEMBERS

– Team Leader: Otto Thomas, OSD (MC&FP)
– Army: Dian Stoskopf
– Navy: Ileen Rogers
– Air Force: Jim Sweizer
– Marine Corps: Vernon Taylor

15. UNDERWRITING FAMILY SUPPORT AS A GOVERNMENT RESPONSIBILITY

Given changes in family structure and responsibilities, the changing demographics of the Total Force, and the challenges of providing programs and services to families living off installations, current Quality of Life programs must evolve. The reviews presented by the functional area teams clearly demonstrate the necessity for underwriting family support.

Current Reality...

• Increasing number of Service Members with family responsibility

• Difficult to deliver programs and services to families off the installation

• Needs and demographics of the Total Force are changing (e.g., more spouses working, more Reservists/Guards called to active duty, etc.)

• QOL important to the Services, but is still a very small portion of the budget

• Reliance on volunteers to implement critical support programs

• Internet not accessible to some QOL activities and families

• Varying level and quality of program/service delivery across the Services

• Emerging global realities have created new and dynamic family and work place stressors

Tomorrow's Programs, Policies and Procedures Must...

• Focus QoL programs to meet the changing defense strategy

• Be dynamic, flexible and elastic while providing seamless access to a broad array of services

• Recognize the changing needs and demographics of military members and families

• Invest in new concepts to maximize new methods of service delivery

• Create new partnerships with local communities to increase support for families off the installation

• Address strategies to support service members and families during emergency/contingency operations.

• Employ use of datamining/automated tools to measure success and equity

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Community Quality of Life

Personnel and Readiness

Monitoring the Status of the Force

FY 2003 POM (FY2003 = $3.8B)

Community Support...

Steady Improvement

Constant FY2001 $$

Legend:
- TAP/RAP
- Child Care
- Family Centers
- Family Advocacy
- Schools (CONUS)
- MWR (AFF)
- Schools (OCONUS)
- Commissaries

Community Support - Per Capita Snapshot (FY01 Constant $$)
• In 1976, DoD spent $1359
• In 2001, DoD spent $2612
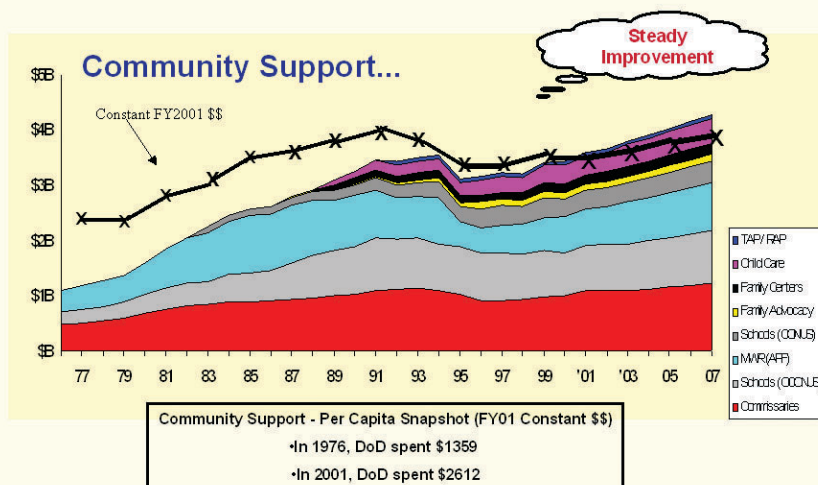
ADDITIONAL REFERENCES

The following references provide additional information on the functional areas highlighted in the new Social Compact.

1. ASSISTANCE WITH WORK LIFE STRESS

The goals in the work-life stress area emphasize the improvement of work conditions (goal 4), increasing the support of military members and their families and increasing their access to that support (Goals 2, 4, and 5), and improving the fit between military members' characteristics and the demands of military service (Goal #3). Two recent comprehensive reviews of the work-family literature are probably the best summaries of relevant research:

Haas, L. (1999). "Families and work." In M. B. Sussman, S. K. Steinmetz, & G. W. Peterson (Eds.), Handbook of Marriage and the Family 2nd Ed. (pp. 571-612). New York, NY: Plenum.

Perry-Jenkins, M., Repetti, R., & Crouter, A. C. (2000). "Work and family in the 1990s." Journal of Marriage and the Family, 62, 981-998.

The first review summarizes research demonstrating the importance of supervisor support and improvement of job conditions for improving worker well-being. In addition, this review describes the results of research studying the counseling and educational programs employers have implemented.

The second review also focuses heavily on the quality of work conditions, including reasonable demands, opportunities for workers to exercise self-direction, and the avoidance of chronic stress arising from feelings of tension or conflict between work and nonwork responsibilities. This review also emphasizes the importance of high quality child care and supervision for worker well-being.

2. MOBILE MILITARY CHILD EDUCATION

Hix, W. M., Shukiar, H. J., Herbert, J., Hanley, J. M. Kaplan, R. J. & Kawata, J. H. (1998). "Personnel turbulence: The policy determinants of permanent change station moves" (Contract No. DASW01-96-c-0004).

Humke, C. and Schaefer, C. (1995). "Relocation: A review of the effects of residential mobility on children and adolescents." Psychology: A Quarterly Journal of Human Behavior, 32, 16-24.

Marchant. K. H. & Medway, F. J. (1987). "Adjustment and achievement associated with mobility in military families." Psychology in the Schools, 24, 289-294.

Tucker, C. J., Marx, J. & Long, L. (1998). "Moving on: Residential mobility and children's school lives." Sociology of Education, 71, 111-129.

Wood, D., Halfon, N., Scarlata, D., Newacheck, P. & Nessim, S. (1993).

"Impact of family relocation on children's growth, development, school function, and behavior." Journal of the American Medical Association, 270, 1334-1338.

3.   CHILD AND YOUTH SERVICES

Existing reference list is well-suited.

4.   COMMISSARIES AND EXCHANGES

None.

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14. UNDERWRITING FAMILY SUPPORT

ABSTRACTS

Author: Bush, Malcolm; Hudson, Sharyl; Jacob, Katy

Title: Tools for Survival: An Analysis of Financial Literacy Programs for Lower- Income Families.

Source: 69 pp.; 2000. Available from the Woodstock Institute, 407 S. Dearborn, Chicago, IL 60605; phone (312) 427-8070; http://www.woodstockinst.org/survival.html.

Abstract:

The increasingly complex financial world has prevented many lower-income families from learning and utilizing the variety of financial services currently available. This causes the poor to remain poor and poverty levels to continue to increase. This report explains the financial literacy programs available through schools, financial institutions, the cooperative extension system, and various other programs. It also gives recommendations to improve these programs in order to reach more lower-income families. An appendix is also provided which gives national resources for local financial literacy programs.

Author: Cheal, David.

Title: NEW POVERTY: FAMILIES IN POSTMODERN SOCIETY.

Source: xix+209pp, CI, Westport, CT: Greenwood Press

Abstract

Following a Preface, this 10-Chpt book, No. 115 in the series, Contributions in Sociology(Dan A. Chekki, series adviser), argues that contemporary poverty can be understood only in the context of

social & economic changes associated with modernization, drawing on various theories of modernization & an empirical comparison of Canadian & US poverty statistics obtained from 1992 expenditure surveys. While there is evidence to support standard, critical, & radical modernization theories, collectively they fail to give adequate recognition to imbalances & tensions in state income-support systems because of their adherence to the myth of the essentially beneficial role of the welfare state in income redistribution. Results indicate that female-headed families have low levels of home ownership, save little, & are generally in a precarious financial situation. More broadly, families with children, whether or not they contain two parents, do not benefit substantially from income redistribution. The most insecure families are those without significant incomes or strong family financial support. Families with children do not receive nearly as much help as the elderly, suggesting that once children & young people escape poverty, it is unlikely that they will be at such high risk again; there is serious intergenerational inequity in social outcomes. It is concluded that theories of postmodernity best capture these empirical trends because they recognize that incompatible models of social time generate a series of relational, demographic, economic, & political crises in which poverty groups are formed. 27 Tables, 7 Figures, Notes. D. M. Smith (Copyright 1997, Sociological Abstracts, Inc., all rights reserved.)

Author: Chi, Peters S K. Laquatra, Joseph.

Title: Profiles of Housing Cost Burden in the United States.

Source: Journal of Family & Economic Issues, 1998, 19, 2, summer, 175-193

Abstract

A ordered logistic regression model using data from the 1987 American Housing Survey indicates that renters suffer a greater housing cost burden than homeowners, & the lower the household income, the larger the portion of income spent for housing. Further, the model also shows that the burden of high housing costs falls disproportionately on certain groups of US households. Compared to the reference group (white, non-Hispanic, nonelderly households who have a male or married-female head & fewer than three children), two single-risk groups (Asian American households & households with three-plus children) & two dual-risk groups (female-headed households with three-plus children & minority households with three-plus children) tend to have a higher risk of excessive housing costs. Elderly households & three elderly-related groups (female-headed, minority, & female-headed minority elderly households), however, tend to have a lower risk of housing cost burden than other households. The housing cost burden of the reference group is comparable to the housing cost burdens of single female-headed households, black households, Hispanic households, & female-headed minority households. Policy implications are discussed. 3 Tables, 22 References. Adapted from the source document

Author: Gauvain, Mary; Savage, Susan; McCollum, Deanne

Title: Reading at home and at school in the primary grades: cultural and social influences.

Abstract

Hispanic children are twice as likely as European American children to read below average for grade level. Some of this difference may be related to the home literacy practices children experience. This study examined school reading achievement of second graders (67 boys and 61 girls; mean age = 8.0 years) in relation to their home reading practices. Mothers and teachers of

European American (n = 75) and Hispanic (n = 53) children from Southern California participated in the study. Results indicate that reading at home, specifically how often children read, with whom they read, and their active initiation of reading, are related to school reading achievement in both groups. These relations were more pronounced for European American boys and Hispanic girls, and fewer relations were found for Hispanic children whose mothers spoke solely Spanish. Results are discussed in relation to home-based opportunities in these two communities for children in the primary grades to develop reading skills.

Author: Hendrix, Scott.

Title: Family Literacy Education—Panacea or False Promise?

Abstract

Discusses perceived shortcomings of current family literacy program models that too often: are conceived and implemented as a compensatory model; target only one child and one parent; do not effectively integrate adult education, literacy/ESL, or parent-child interaction time into programing; and that have a radically unstable funding base. Advocates family literacy education with a research-practice paradigm. (SR)

Author: Humke, Christiane. Schaefer, Charles.

Title: Relocation: A review of the effects of residential mobility on children and adolescents.

Abstract

Conducted a literature review to investigate the effects of relocation on children and adolescents. The reviews included studies based on parents' reports, children's reports, and clinicians' reports. The evidence suggests that moving is a stressful life event that can impair a child's adjustment. The following factors were identified as mediating the risk of impairment to a child's psychosocial and educational adjustment following a move: moving due to familial disruption, poor premove adjustment, number of moves, distance of move, and multiple stressors. One of the most influential factors was parental attitude toward the move, since children were found to mirror their parents' attitudes. ((c) 1997 APA/PsycINFO, all rights reserved)

Author: Huston, Aletha C. Duncan, Greg J. Granger, Robert. Bos, Johannes. McLoyd, Vonnie. Mistry, Rashmita. Crosby, Danielle. Gibson, Christina. Magnuson, Katherine. Romich, Jennifer. Ventura, Ana.

Title: Work-based antipoverty programs for parents can enhance the school performance and social behavior of children.

Abstract

Assessed the impact of the New Hope Project (NH), an antipoverty program tested in a random assignment experimental design, on family functioning and developmental outcomes for preschool- and school-aged children (N = 913). NH offered wage supplements sufficient to raise family income above the poverty threshold and subsidies for child care and health insurance to adults who worked full-time. NH had strong positive effects on boys' academic achievement, classroom behavior skills, positive

social behavior, and problem behaviors, as reported by teachers, and on boys' own expectations for advanced education and occupational aspirations. There were not corresponding program effects for girls. NH parents were employed more, had more material resources, reported more social support, and expressed less stress and more optimism about achieving their goals than did parents in the control sample. Results suggest that an anti-poverty program that provides support for combining work and family responsibilities can have beneficial effects on the development of school-age children. (PsycINFO Database Record (c) 2000 APA, all rights reserved)

Author: Larson, Reed W. Almeida, David M.

Title: Emotional transmission in the daily lives of families: A new paradigm for studying family process.

Source: Journal of Marriage & the Family. Vol 61(1), Feb 1999, 5-20.

Abstract

This collection of articles brings together studies that examine the transmission of emotions between family members. All studies employ repeated diary or experience-sampling data to examine daily within-person and within-family variations in emotional experience. Emotional transmission is evaluated by assessing circumstances in which events or emotions in one family member's immediate experience show a consistent, predictive relationship to subsequent emotions or behaviors in another family member. This introduction places this empirical paradigm in the context of other approaches to research, discusses research methods and statistical procedures for studying emotional transmission, and reviews the major findings obtained thus far in this body of research. We argue that this empirical paradigm provides a promising tool for understanding emotional processes within the daily ecology of family and community life. ((c) 1999 APA/PsycINFO, all rights reserved) (journal abstract)

Author: Lloyd, Kim M. South, Scott J.

Title: Contextual Influences on Young Men's Transition to First Marriage.

Source: Social Forces, 1996, 74, 3, Mar, 1097-1119

Abstract

Competing theories of marriage formation are evaluated by merging several contextual variables, primarily marriage market characteristics from the 1980 census, with male (M) marital histories observed 1979-1984 in the National Longitudinal Survey of Youth. Discrete-time event history models reveal that, net of conventional individual predictors, a shortage of prospective partners in the local marriage market impedes white Ms' transition to first marriage. Females' (Fs') aggregate economic independence, measured in terms of the proportion of Fs in the local marriage market who are employed & in terms of the size of average Aid to Families with Dependent Children AFDC payments, also diminishes Ms' marriage propensities. Although earnings & home ownership facilitate Ms' marital transitions, racial differences in socioeconomic & marriage market characteristics account for relatively little of the

substantial racial difference in marriage rates. 4 Tables, 1 Figure, 50 References. Adapted from the source document.

Author: Marchant, Karen H.
            Medway, Frederic J.

Title: Adjustment and achievement associated with mobility in military families.

Source: Psychology in the Schools. Vol 24(3), Jul 1987, 289-294.

Abstract

Investigated 40 US Army families regarding their history of geographic mobility, identification with Army life, their personal well-being, and children's school achievement and social competence. Frequent relocation was not found to be detrimental to service member or spouse and, in fact, was positively associated with higher child and social competence. Military identification correlated with well-being for service members but not for spouses. However, it was the degree of spouse military identification that was more strongly related to children's adjustment than that of service members. ((c) 1997 APA/PsycINFO, all rights reserved)

Author: Mirowsky, John. Ross, Catherine E.

Title: Economic Hardship across the Life Course.

Source: American Sociological Review, 1999, 64, 4, Aug, 548-569

Abstract

Tests two hypotheses about the relationship between age & reported difficulty paying bills or buying things the family needs, eg, food, clothing, medicine, & medical care. The affluence-trajectory hypothesis follows from age-group differences in income, income per capita, & official poverty, suggesting that economic hardship declines in successively older age groups up to late middle age, but then rises. The adequacy-gradient hypothesis follows from research indicating a progressively favorable balance of resources relative to needs in successively older age groups, suggesting that economic hardship declines progressively in successively older age groups. Two US telephone surveys (N = 2,592 respondents each in 1990 & 1995) show a progressive decline in economic hardship in successively older age groups consistent with the adequacy-gradient hypothesis. Most age-group differences in economic hardship appear attributable to differences in the presence of children in the home, in resources such as homeownership & medical insurance, & in behaviors such as moderation & thrift. 3 Tables, 4 Figures, 39 References. Adapted from the source document

Author: Perry-Jenkins, Maureen. Repetti, Rena L. Crouter, Ann C.

Title: Work and family in the 1990s.

Source: Journal of Marriage & the Family. Vol 62(4), Nov , US www.allenpress.com: Allen Press Inc/National Council on Family Relations. 2000, 981-998.

Abstract

Highlights 4 themes emerging from the work and family literature of the 1990s. The 1st theme evolves from the historical legacy of the maternal employment literature with its focus on children's well-being. The 2nd theme, work socialization, is based on the premise that occupational conditions, such as autonomy and complexity, shape the values of workers who in turn generalize these lessons off the job. Research on work stress, the 3rd theme, explores how experiences of short- and long-term stress at work make their mark on workers' behavior and well-being off the job. Finally, the multiple roles literature focuses on how individuals balance roles, such as parent, spouse, and worker, and the consequences for health and family relationships. In addition to these 4 themes, advances in work and family policy initiatives over the past decade are discussed. Suggestions for future research focus on addressing issues of causality, attending to the complexity of social contexts, linking research to policy, and developing interdisciplinary theories and research designs. (PsycINFO Database Record (c) 2000 APA, all rights reserved)

Author: Rohe, William M. Basolo, Victoria.

Title: Long-term effects of homeownership on the self-perceptions and social interaction of low-income persons.

Abstract

A variety of public, private, and nonprofit organizations have developed programs to help low-income families purchase homes. These programs are often justified on the grounds that home ownership has a number of social and psychological benefits. The authors conducted a longitudinal study to assess the validity of these claims by comparing changes in self-esteem, perceived control, life satisfaction, and social interaction between 90 low-income home buyers and a similar group of 65 continuing renters. Ss were interviewed at baseline (before they bought their homes), and approximately 18 and 36 mo after buying their homes. Home ownership had a positive and significant impact on both the life satisfaction and participation in neighborhood and block association meetings. Home ownership, however, did not significantly affect self-esteem, perceived control, or informal social interaction in the local area. ((c) 1998 APA/PsycINFO, all rights reserved)

Author: South, Scott J. Crowder, Kyle D.

Title: Escaping distressed neighborhoods: Individual, community, and metropolitan influences.

Abstract

Identified the characteristics of individuals and households as well as neighborhoods and metropolitan areas that impede or facilitate residential mobility between poor and non-poor neighborhoods. The authors attached information on the census tract and metropolitan area of residence at each annual interview for Black and White respondents in the 1979 to 1985 waves of the Panel Study of Income Dynamics to trace the mobility experiences of persons initially residing in poor and non-poor areas. Results indicate that education and marriage increased the likelihood of leaving poor tracts, while age, home ownership, and receiving public assistance reduced it. Blacks were substantially less likely than Whites to escape poor tracts and substantially more likely to move into them, even after SES was controlled. Residential segregation by race and poverty status and the supply of new housing in the metropolis also influenced the likelihood of moving between distressed and nondistressed neighborhoods. ((c) 1997 APA/PsycINFO, all rights reserved)

Author: Tucker, C. Jack. Marx, Jonathan. Long, Larry.

Title: "Moving on": Residential mobility and children's school lives.

Abstract

Parents are often warned of the negative impact of moving on children, but there has been little research on how the influence of moving may vary by

family structure. The study presented here used data from the Child Health Supplement to the 1988 National Health Interview Survey to investigate the impact of mobility on the school life and performance of 4,595 Black and White elementary-aged school children (aged 7-12 yrs) in families with both biological parents present and those in alternate family structures. The study found that children who have moved an average or above average number of times are not significantly harmed if they reside in families in which both biological parents are present; however, for children in other family structures, any move is associated with an adverse school life. ((c) 1998 APA/PsycINFO, all rights reserved)

Author: Williams, Marva E.; Hudson, Sharyl

Title: Building the Savings and Assets of Lower-Income Consumers.

Source: 55 pp.; 1999. Available from Woodstock Institute, 407 South Dearborn Suite 550, Chicago, IL 60605; Email: woodstock@wwa.com; http://www.woodstockinst.org/assets.html.

Abstract

Efforts to alleviate poverty have traditionally concentrated on strategies to increase the income of lower-income households through employment and training, tax policy and income redistribution. Recently, policymakers, academics and practitioners have recognized the importance of enabling poor families to build assets if they are ever to reach self-sufficiency. Although obviously related to income, asset development has additional long-term financial and social benefits. As a result of this recent emphasis on asset development, several new programs have been developed, most notably Individual Development Accounts (IDA) that match the savings of lower-income people for home ownership, business development, or education expenses. However, very little has been written about the long-term efforts of community development credit unions (CDCUs), which have a long history of formal and informal strategies to increase the financial literacy of their members, encourage thrift, support savings and enable the accumulation of personal assets.

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III. OVERVIEW OF SERVICES' DELIVERY SYSTEMS AND STRATEGIES

INTRODUCTION

Each Military Service currently has activities that are consistent with elements of the Social Compact. Many of these initiatives were in place prior to this review—a clear indication of the Services' ongoing concern with family support and well-being, and the broad-based response to these concerns. The following descriptions provide a sense of the program direction and breadth of support for personnel, families, and others connected with the military community across the Services. The apparent similarities and differences between these program approaches demonstrate that supporting families can be accomplished in several ways. The information provided in this section was derived from a combination of research and scholarly publications, briefings, reports, policy papers, and Web sites (see attached reference section).

PROGRAM DESCRIPTIONS

ARMY WELL-BEING

In the early part of 2001, the Army distributed a memorandum outlining its approach to improving the well-being of the military members, families, and civilians that support the Army. It was noted that "The Army is People, and Soldiers are the centerpiece of our formations." The report stressed that the strength of the Army and its combat readiness is closely tied to well-being. The essential elements of the Army approach include:

★ The identification of significant Army outcomes related to performance, readiness, retention, and recruiting.

★ The integration of well-being programs that contribute to the collective strength of the Army by producing self-reliant individuals who can focus on the mission.

★ The recognition of the strong bond between the Army and individuals.

★ The recognition that the responsibility for well-being is shared between individuals and Army leaders.

★ The recognition that individuals ultimately decide how best to ensure the well-being of themselves and their families.

★ The recognition that the Army provides opportunities for people to achieve the sense of well-being they desire for themselves and their families.

According to the Army's strategic plan, well-being includes physical, material, mental, and spiritual dimensions. Each of these contributes to how prepared people (soldiers, their families, and civilians) are to perform the Army's mission. According to the Army, "Army well-being represents The Army's coordinated efforts to integrate policies, programs, and issues into a holistic and systematic framework that supports mission preparedness as well as individual aspirations." This approach:

★ Operates from a holistic view of well-being that accesses diverse programs.

★ Accounts for the "intangibles" that influence well-being such as teamwork, leadership, command climate, and predictability.

The Army Strategic Plan presents a framework for well-being that recognizes the need to live, the need to connect, and the need to grow. The plan clearly notes that not all needs people have, or their aspirations for that matter, can or should be met by the Army. Programs associated with the need to live (the essential function of Army well-being) involve

housing, health care, and pay, whereas those associated with the need to connect (the defining function of Army well-being) provide opportunities for people to associate with each other and to build esprit de corps. Programs associated with the need to grow (the enhancing function of Army well-being) include religious activities, volunteerism, spouse employment, and recreational programs.

The Army has defined five strategic goals. First, develop a comprehensive strategy so well-being initiatives, programs, and resources are integrated to meet existing needs. Second, provide a competitive standard of living for all soldiers, civilians, and their families. Third, develop a sense of pride and of belonging among soldiers, civilians, and families that is based in a sense of community and a record of accomplishment. Fourth, provide an environment that encourages people to fulfill their personal aspirations. Fifth, ensure leadership that develops a positive command climate and that reduces negative effects of turbulence, excessive OPTEMPO, and lack of predictability.
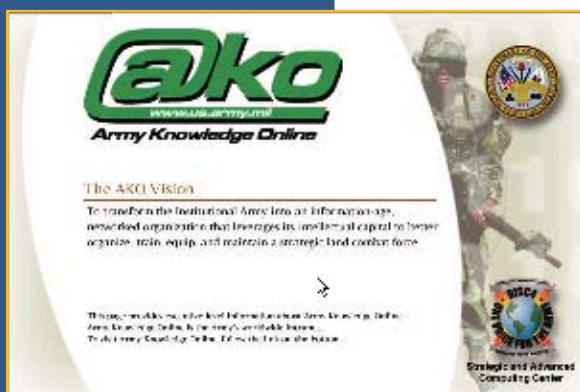
The approach the Army is employing is grounded in the assumption that both people and the institution are responsible for well-being, that programs provided by The Army must be integrated, and that mission success is significantly related to the well-being of military members, civilians that support the Army mission, and their families. An effective Army well-being initiative will result in:

★ Better leadership that prioritizes resources, tracks progress, and measures impact.

★ A better institution that increases its strength, and improves outcomes related to performance, readiness, retention, and recruiting.

★ A better life for people in the Army, including consistent and continuous support for their well-being, achievement of individual aspirations, reasonable expectations of them, and caring leadership.

To support their strategic plan, the Army has developed Army Knowledge Online (AKO), which is described on the following Web site (http://www.army.mil/ako). A username and password are required to use the AKO portal (http://www.us.army.mil/portal/portal_home.jhtml). The AKO portal site contains what is referred to as "executive-level information" and can be used by active duty Army personnel, Reserve and National Guard personnel, Department of the Army civilians, retired Army, and guests of the Army. The Army portal offers a customizable, encrypted, personal portal page for each soldier and DA civilian. The portal allows the user to retrieve current knowledge on subjects of their own choosing. Army forms, regulations, information on installations, and the latest news about the Army are also included.

NAVY AND MARINE QUALITY OF LIFE MASTER PLANS AND NAVY LIFELINES

The Navy and Marine Quality of Life plans emphasize the commitment the Services have to sailors and their families. Primary elements of the Navy Morale, Welfare and Recreation (MWR) Quality of Life plan include:

★ Navy MWR commitment to providing the best possible customer-focused programs to Sailors and families across all duty stations.

★ Commitment to supporting the unique culture of the "military hometown."

★ MWR's strong commitment to strengthening the QoL programs that address readiness and retention.

★ The recognition that effective MWR programs provide a safe and healthy environment for military families, contribute to an attractive military culture and lifestyle, support teamwork among members and families, help socialize members and families into Navy life, and support individual, intellectual, and physical development.

A primary goal in the Marine Quality of Life Master Plan is to sustain Marines and their families. Within that overarching goal, there are five components:

★ **Promote healthy lifestyles.** Promote healthy lifestyles by providing proactive prevention programs and services that give Marines and their families healthy lifestyle choices, education, information, and other positive resources to prevent problems.

★ **Advance lifelong learning.** Support lifelong learning by expanding opportunities and educational delivery methods, and improving resources such as libraries.

★ **Resilient families.** Provide quality services and programs to give families the vital knowledge and essential leadership skills to address issues before

they become serious problems that impact the readiness of individual Marines, commands, and families. In addition, the goal of developing resilient families will be addressed through improved systems to keep families informed about the Marine mission, tasks of units, and a sense of community.

★ **Responsible citizenship.** Enhance the capabilities of all Marines to be better managers of their own health. Provide better systems to support self-help activities. Provide effective services as applied to separation and transition to civilian life. Improve employment assistance for family members. Assist Marines and their families to improve responsible citizen trait skills such as money management and parenting, and provide programs that prevent harmful behavior such as alcohol and drug dependency.

★ **High value goods and services.** Provide quality programs and services to support Marines and their families at the lowest possible cost, and adopt best practices from the public and private sectors.

While both the Navy and Marine plans emphasize the many components that comprise Quality of Life, they place particular emphasis on the significance of family well-being as it relates to primary service goals of readiness and retention.

To support their Quality of Life Plan, the Services have developed LIFELines, a comprehensive Web-based Quality of Life services network provided to Navy, Marine, and Coast Guard personnel and families (http://www.lifelines2000.org). The specific target audience includes active duty

members, civilian personnel, exceptional family member/special needs families, leadership, spouses, program managers, reserves, and veterans and retirees. In addition to the United States Navy, there are 11 other partners in LIFELines: Marine Corps, Naval Reserve, U.S. Coast Guard, Navy Rights and Benefits, Naval Services Family Line, U.S. Naval Reserve Ombudsman, Immigration and Naturalization Service, Navy Media Center, Naval Personnel Command, U.S. Navy Bureau of Medicine and Surgery, and Navy-Marine Corps Relief Society.

LIFELines has links to Command and Community Support Services, including deployment readiness, family support, legal assistance, TRICARE, MWR, "New to the Military," relocation and housing, tragedy support, transition assistance, and veterans and retiree support services. The "New to the Military" section includes topics such as family resources, general information, military basics, and programs/benefits. Family resource materials include the "New Spouse's Guide to the Military" and "Developing a Family Care Plan." LIFELines also includes a list of crisis hotlines and links to numerous other related information sites, such as Naval Services Family Life (which is geared specifically to support for spouses of military members). The site also contains a toolbox section with directories, a Frequently Asked Questions section, a personnel locator, site search capabilities, and a "What's New" area.

AIR FORCE QUALITY OF LIFE, COMMUNITY CAPACITY MODEL AND AIR FORCE CROSSROADS

According to the Air Force, Quality of Life is a key to mission readiness— complementing doctrine, force structure, and modernization. Quality of Life investments are necessary to help mitigate the impact of increasing demands being placed on Air Force members. The return on Air Force Quality of Life investments influences recruiting, retention, duty performance, mission accomplishment and ultimately readiness.

The following eight Quality of Life priorities have been identified as being critical for recruiting and retaining the right people as well as the critical skills to achieve mission accomplishment across all spectrums:

★ **Adequate Manpower**

★ **Improved Workplace Environments**

★ **Fair/Competitive Compensation and Benefits**

★ **Balanced TEMPO**

★ **Quality Health Care**

★ **Safe, Affordable Housing**

★ **Improved Educational Opportunities**

★ **Enriched Family and Community Programs.**

The Air Force realizes that to achieve these priorities, they must focus on enhancing members' sense of community and belonging by addressing factors such as work demands, relocations, deployments and tempo, which contribute to social isolation. The Air Force implementation plan to improve the quality of individual and family life has three main elements: a new community enhancement focus (community capacity); a new collaborative human services structure (Integrated Delivery System and Community Action Information Board); and a new emphasis on community results (results management).

Community Capacity. Over the past five years, through a collaborative partnership with all the helping agencies, the Air Force has developed a Community Capacity Building approach to addressing the challenges families and communities face. This community capacity construct applies to both prevention and intervention activities, with relevance for families who are having difficulties, as well as those that are adapting well to Air Force life.

★ The community capacity approach is rooted in the larger social context of the Air Force community, and it recognizes the influence of both informal and formal networks on families. Formal networks include military units and base agencies as they promote connections between members and their families through the provision of specific support services. A key function of the formal network is to strengthen informal community connections, rather than to take on tasks for which the informal network should be responsible. Informal networks include unit-based support groups and relationships with work associates, neighbors, and other families. Because they rely
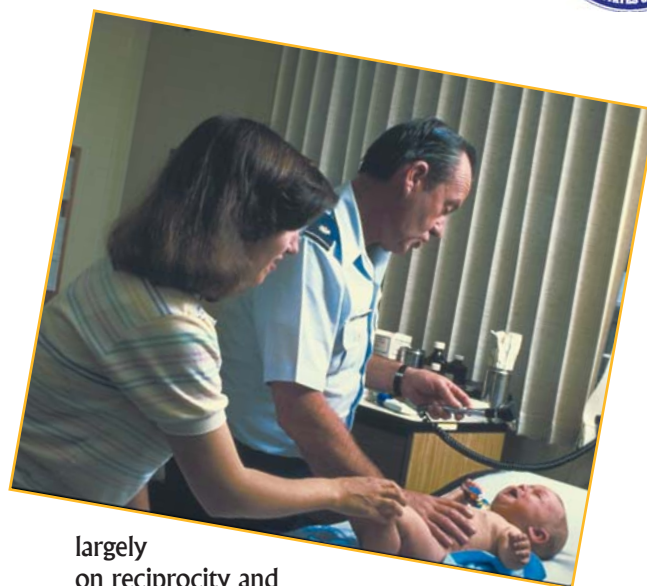
largely on reciprocity and mutual exchange, informal networks are typically voluntary and less organized than formal networks. The community capacity approach assumes that variations in how well families are doing across bases, as well as how well families are doing at any one time within a base community, are associated with the strength of the formal and informal networks. Moreover, a linchpin in base well-being is the nature of the interaction between the formal and informal networks because this affects community capacity.

Two elements of community capacity reinforce one another:

★ A sense of *shared responsibility* for the welfare of the community and its members as expressed by unit leaders, base agencies, and community members

★ The demonstration of *collective competence* in taking advantage of opportunities for addressing community needs and for dealing with issues that threaten the well-being of community members.

When community capacity is high, members and families:

★ Devote time and energy to making the community a better place to work and live, thereby working together to promote the common good

★ Pull together to address challenges, to identify community needs, to define common goals, set priorities, and develop strategies for collective action

★ Develop community identity and pride

★ Meet individual and family needs and goals

★ Participate meaningfully in community life

★ Are more effective in solving problems and managing conflicts

★ Maintain stability in personal, family and work relationships.

INTEGRATED DELIVERY SYSTEM AND COMMUNITY ACTION INFORMATION BOARD

The Air Force mechanism to implement this community capacity initiative is the Integrated Delivery System (IDS). IDS membership at the base, major command, and Air Force levels includes, but is not limited to: Family Support, Family Advocacy, Health and Wellness Center, Life Skills Centers, Family Member Programs, and Chaplains. A primary goal of the IDS is to work collaboratively to provide a seamless, integrated delivery system of prevention services. The IDS develops agency partnerships committed to enhancing both formal and informal support systems.

RESULTS MANAGEMENT

The community capacity initiative employs a Results Management approach to service delivery, to achieve three key program results:

★ **Leader Support**—the degree to which base and unit leaders promote connections between members and families in their units, demonstrate knowledge and skill in helping members and families balance work and family issues and cope with AF demands, and help members and families secure support services.

★ **Informal Community Connections**—the degree to which informal network members reach out to make connections with one another, exchange information and resources, and help others, when needed, to secure the support from community programs and support services.

★ **Interagency Collaboration**—the extent to which base agencies demonstrate a customer orientation in the coordination and delivery of intervention and prevention services as evidenced by community members' satisfaction with base programs.

Air Force Crossroads (http://www.afcrossroads. com) is the Air Force Web site designed to provide a wide range of practical community information for members and their families. AF Crossroads, the official community site of the USAF, states on its home page, "The Air Force believes that one of the most important attributes is a sense of community among its members and families. The Air Force is rededicating itself to both maintaining this sense of community and finding new and more efficient ways of providing it." Among the major categories of information that are available

are: casualty and loss, elder care, education, leisure activities, parenting, relocation, financial planning and assistance, family separation and readiness. Within each category is information users can readily apply to their personal or family situation. For example, when going into the section on family separation and readiness one finds a pre-deployment guide. There also is a document on return and reunion after a family member has been deployed, which includes tips on having a successful homecoming. The site includes a wealth of information on DoD sites with specific information and base videos on AF installations. Additionally, the spouse forum on AF Crossroads has created a cyber community in which spouses share concerns and information and help educate each other on benefits and services available at installations and in local communities.

RECRUITING SERVICE LIFEWORKS PROGRAM

LifeWorks is a family support program provided to recruiting service personnel of the Army, Navy, and Air Force (http://www.lifeworks.com). A user identification and password are required to access this site. Because recruiters are typically not located near installations or bases, they have difficulty accessing individual and family support programs. Because there are few support bases, recruiters are working longer hours to meet their goals. Given this, they are also experiencing more strain between their personal and professional lives. For this reason, support for recruiters and their families is a necessity. LifeWorks contains the kinds of information and support that are consonant with that available on bases themselves. LifeWorks is Web-based and has links to additional military family support Web sites (for example, Army recruiters are linked to the USAREC Soldier and Family Assistance Branch site, http://www.usarec.army.mil).

Additionally, the LifeWorks web site allows the user to be linked directly (via a 1-800 number or e-mail) to a LifeWorks consultant to discuss questions and concerns. Through LifeWorks, the recruiter can access information from the site and,

if she/he so desires, can actually call a professionally trained person to discuss problems or request more information. This personal contact service is available 24 hours a day, each day of the year. All of these LifeWorks services are available in Spanish, including Spanish-speaking consultants.

The site itself contains these major categories of information:

★ Parenting and child care

★ Education

★ Older adults

★ Disability

★ Financial

★ Legal

★ Everyday issues

★ Work

★ Managing people

★ Emotional well-being

★ Addiction and recovery.

Within each of these major categories is detailed information that addresses particular challenges. For example, an article on supporting children as they transition to college can be found under the education category. This information is designed to be helpful to youth and to their parents, and includes sub-topics such as the high school senior year buildup, the summer before the freshman year, first semester in college, the first visit home, and the next four years. In addition, the site has bulletin boards, featured tools, and a focus on events. There is also a featured topic each month (for example, recently the feature was a 2002 Almanac Calendar that contained numerous tips, facts, and reminders related to personal and family

issues). Recently, there were special articles on helping children with homework and on stress reactions to media coverage of traumatic events.

RESERVE/GUARD COMPONENTS FAMILY SUPPORT INITIATIVES

In the late 1990s, the Secretary of Defense issued a policy memorandum that described the seamless Total Force as including a full integration of Reserve and active duty components. Since the Cold War, the National Guard and the Reserves have been called to active duty on a regular and substantial basis. Consequently, the concern the military has about families of active duty members applies equally to members of the Reserves and National Guard. In 1999, the National Guard and Reserve Family Readiness Strategic Planning Conference developed a vision of Guard and Reserve family readiness programs for the future.

Four major goals were determined as a results of the 1999 planning conference:

★ Support mission readiness through Reserve component family readiness

★ Develop family readiness programs and services that improve quality of life and support recruiting and retention

★ Provide Guard and Reserve members equitable and accessible benefits and entitlements

★ Standardize family readiness programs to ensure Reserve component families are seamlessly integrated into the Total Force and that mission requirements for each service and Reserve component provide family support to the Total Force.

The responses to the goal of *supporting mission readiness* included involving leaders at all levels in the process of providing support to families, establishing and enforcing command responsibility in supporting family readiness as an aspect of mission readiness, and establishing a family readiness office responsible for the Reserve component.

Responses to the goal of *developing family readiness programs* included routinely scheduling family support activities and family readiness training for unit members and their families; establishing partnerships with recruiting stations, Department of Veterans Affairs offices, and civilian organizations to provide quality services in remote and geographically separated areas; and ensuring that unit commanders address family support and readiness in both internal and external unit activities.

Suggested strategies for accomplishing the goal related to *benefits and entitlements* included establishing educational programs that inform families about benefits and services, how to understand the military chain of command, how to prepare for family separations, as well as providing information to families during unit mobilizations, deployments, and training. Additional strategies include

providing interservice access for family readiness programs and services to Reserve component members and their families, and seeking alternatives for assisting families of Reserve component members who suffer income loss because of activation.

Strategies to address the goal of *standardization of family readiness programs* include creating standardized pre-deployment and mobilization checklists for families, implementing a sponsorship program at the command unit levels for families of new unit members, and updating DoD policies and procedures for family readiness in the Guard and Reserve components.

The strategic plan that focuses on Guard and Reserve components mirrors most elements of plans pertaining to active duty components in that it attends to the circumstances families face when one of their members is deployed, notes the stresses families experience, and structures responses that address the nexus between families and the military system as it applies to readiness.

Two of the products that indicate responses to the strategic plan are *The Help Guide to Guard and Reserve Family Readiness: A Key Component of Mission Readiness* (http://www.defenselink.mil/ra/family/toolkit/pdf/helpguide.pdf) and *The Guide to Reserve Family Member Benefits* (http://www.defenselink.mil/ra/documents/family/benefits.pdf). *The Help Guide* includes a family resource directory, pre-deployment checklist, a guide for family separations, and a six-step process related to family readiness programs (components are in-processing, welcome briefing, training and the military mission, pre-deployment, deployment, and reunion). The Help Guide also discusses key factors in successful family readiness programs: command emphasis, effective staff support, dynamic family readiness program leadership, and proactive communications with members and spouses. *The Benefits Guide* provides detailed information for families on military benefits, eligibility, the process of obtaining assistance, and lists of other resources for assistance to families.

SUMMARY AND DISCUSSION

This brief review of military initiatives designed to enhance the quality of life of service members and

their families demonstrates that, to date, the military has taken a broad-based approach to quality of life support. On-base/installation programs and Web sites are being used to address personal and family concerns at multiple levels including but not limited to, recreation, family support, education, stress, and spouse issues.

The programs and services reviewed here represent a solid base for enhancing programs from a Social Compact philosophy. There are already numerous activities related to the functional areas that comprise this Social Compact initiative. Elements of an effective Social Compact include:

★ Recognition by organizations that there is value in addressing work and personal life issues

★ Development of an organizational environment supportive of both work life and personal life effectiveness

★ Cultivation of the mutual sense of responsibility on the parts of organizations and the people that comprise them

★ The provision of integrated programs

★ The recognition from the organization that its own culture must support employees and their families

★ The appearance of core values related to support throughout the organization rather than only within support programs

★ The recognition that factors external to the organization and within the community are important for quality of life within the organization.

The initiatives reviewed in this discussion generally contain elements of the Social Compact. In some cases, the language used to describe the initiative closely parallels the Social Compact philosophy (as examples, the Army Well-being Strategic Plan and the Marine Quality of Life Master Plan). In other cases, it is the description of the initiative that demonstrates Social Compact principles; for example, the Air Force Community Capacity Initiative focuses on program integration and is keyed into viewing issues from a larger community perspective.

All of the Service initiatives demonstrate that they see the strategic value in addressing the nexus of work life and personal/family life, in that all are concerned with key organizational goals related to recruitment, retention, morale, and mission readiness. By virtue of providing integrated programs and services, either actual or virtual, the Services have recognized how elements of the work environment influence the quality of both work life and personal life.

The Services also recognize that quality of life is determined both by what an organization does and by what people do for themselves in concert with that organization. Finally, it is important to note that the Services have been moving toward not only integrating programs internal to the military, but to developing partnerships with agencies and organizations in the civilian community as well. These responses to individual and family issues are consistent with the Social Compact philosophy and its goals, and, consequently, should provide a solid and productive basis upon which to apply the Social Compact in more intentional ways. Current programming efforts seem to reflect a vibrant, timely, and relevant approach to supporting military personnel and families, and thus readiness requirements.

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Navy and Marine LIFELines (http://www.lifelines2000.org).

Recruiting Services LifeWorks (http://www.lifeworks.com). This is general site for Ceridian, the company that provides this service for the military. Access to a particular military site can only be gained via username and password.

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APPENDICES

A. 2001 Quadrennial Defense Review, Quality of Life Terms of Reference and Assumptions

B. "Social and Psychological Contracts: Relationships between Workers and Employers in the 20th Century;" Military Family Research Institute, Purdue University

C. "Family-Centered Employment;" A Survey of Current Practices

D. Underwriting Family Support: Policies and Public Laws

E. Social Compact Participants by Service/Agency

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APPENDIX A
2001 QUADRENNIAL DEFENSE REVIEW
QUALITY OF LIFE

> *"The Department must forge a new compact with its warfightfers and those who support them—one that honors their service, understands their needs, and encourages them to make national defense a lifelong career."*
>
> —2001 Quadrennial Defense Review, September 30, 2001

2001 QDR QUALITY OF LIFE TERMS OF REFERENCE

The following overarching precepts were utilized in addressing quality of life in the 2001 QDR:

★ Given the changing demographics, higher aspirations and expectations of the modern workforce and family, how can the Department:

  ★ Establish a new social bargain with families?

  ★ Strengthen quality of life programs and policies?

  ★ Improve retention and morale?

★ What alternative human resource strategies would address future anticipated missions, given that expectations for quality of life are increasing and require a new Social Compact with members and families that adjusts and strengthens our network of supporting policies and programs?

★ The following questions were also considered:

  1. What can be done to address the higher aspirations and expectations of better educated military families? (This includes dual earner couples and a growing number of single parents.)

  2. How can DoD provide high quality, affordable health care for all categories of beneficiaries?

  3. What can be done to ensure that military families receive quality housing on base or in the private sector in the most cost effective manner?

  4. What is the impact of spouse unemployment on QoL and what can be done to counteract it?

  5. How do we sustain and meet the QoL needs of the military child for education and child care?

  6. What can be done to improve the quality of participation in the Reserve Components, including addressing civilian employer and reserve family concerns?

  7. How does DoD meet the changing needs and expectations of the civilian workforce?

  8. How can DoD ensure that the QoL program accommodates the needs of a diverse cultural and ethnic population?

  9. Given an increasingly educated force, what changes need to be made to meet educational expectations of service members and their spouses?

  10. How will QoL need to be adjusted for changes in stationing, PERSTEMPO, or other fundamental changes driven by QDR results?

  11. What are the unique demographic characteristics of our families (e.g., early marriages and child bearing, divorce rates), and what policies need to address these concerns?

  12. What are the effects of projected workforce composition, structure and location on QoL needs?

2001 QDR QUALITY OF LIFE ASSUMPTIONS

The following assumptions formed the framework for addressing quality of life in the 2001 QDR:

Families are the foundation for the success of America's military readiness. The Department of Defense must continue to support a quality of life for military members competitive with that available to the corporate American labor force.

The Department of Defense must strike a new bargain with families that recognizes dual earner, more highly educated couples who seek an ever-higher standard of living for themselves and their children.

The Department of Defense must recognize the changing demographics of the workforce and tailor programs to meet the needs of a multi-cultural, multi-generation military community.

The 2001 QDR can be found at http://www.defenselink.mil/pubs/qdr200l.pdf.

APPENDIX B
SOCIAL AND PSYCHOLOGICAL CONTRACTS: RELATIONSHIPS BETWEEN WORKERS AND EMPLOYERS IN THE 20TH CENTURY

SUMMARY

TEN THINGS TO CONSIDER ABOUT COMPACTS AND CONTRACTS

10. Social contracts are the expectations and obligations that workers, employers, and their communities and societies have for work and employment relationships.

9. Psychological contracts are the beliefs of an individual regarding the terms and conditions of a reciprocal agreement between that person and another party.

8. The social contract in the U.S. workforce has evolved from a relatively stable long-term relationship with steady upward mobility to a series of less stable shorter-term relationships with considerable lateral mobility: the work world has become less predictable.

7. The work setting has also changed: wages have stagnated, families have more earners, the gap between the "haves" and "have-nots" in the workforce has widened, job quality has declined, and interest in public participation seems to have declined.

6. All contracts, whether written or unwritten, in the end are essentially psychological.

5. Compacts or contracts are not just promises, they are two-way exchanges.

4. The social compact in the military is relational, as opposed to transactional. It is broad in scope, of long-term duration, and open to interpretation.

3. Violation of psychological contracts causes anger, not just disappointment. Relational contracts hold greater risk of violation and, when violated, reduce trust and lead participants to focus on narrow, short-term issues: on transactions.

2. We learn from the private sector and existing research that the risks and returns to organizations differ for factors perceived by workers as entitlements and benefits. There is low return for providing entitlements but high risk for not doing so. There is high return for providing benefits but low risk for not doing so.

1. The locus of pain among workers varies both across and within organizations, but may focus on the violation of entitlements.

SOCIAL AND PSYCHOLOGICAL CONTRACTS: RELATIONSHIPS BETWEEN WORKERS AND EMPLOYERS IN THE 20TH CENTURY

The relationships between organizations and their members are constantly evolving and continually renegotiated or forced to change by external trends, changes in the constraints and opportunities of the environment in which the organizations operate, or changes in members themselves. American workplaces, including military organizations, are no exception. In fact, the bargain between the military and its members has often been more explicit than in other employing organizations because of the

extensive array of supports required to adequately train and deploy members around the world. Today, with an all-volunteer force, shrinking infrastructure of bases, increasing reliance on reserves, and changing mission demands, the U.S. military is giving explicit consideration to the "social compact" it envisions for the coming years between the military and its members. The purpose of this report is to provide a conceptual backdrop for those discussions.

We begin with a review of demographic trends over the past 100 years, using them as a lens through which to view the years to come. In particular, we consider the evolution of the "social contract" between workers and employers. We then introduce "psychological contracts" and their implications for workers' behavior. Finally, we present a case study from corporate America as examples of the renegotiation of bargains between workers and employers.

It should already be clear that language is very important to this discussion, as evidenced by our use of terms like "social contract" and "psychological contract." The Department of Defense has adopted the term "social compact" for its efforts. Research suggests that the distinctions among the first words in the phrases may be more important than the distinctions among the second. That is, neither the dictionary nor workers may perceive much difference between "bargains," "compacts," and "contracts." The differences between "social" and "psychological," however, are very important.

Social contracts have been defined as the "the expectations and obligations that workers, employers, and their communities and societies have for work and employment relationships" (Kochan, 2000, p. 3). Social contracts are public-shared views about what the partners in employment relationships should give and get. Psychological contracts are private, residing in the minds of workers and guiding their behavior, but not necessarily observable to others. Whether or not employers or societies intend it, social and psychological contracts always exist and are always evolving.

THE OLD (CIVILIAN) SOCIAL CONTRACT

Social contracts evolve within the context of a larger society that itself is always shifting. In this section, we review the major demographic trends of the past century that are the backdrop for social contracts today and in the years to come.

As the lower figure on the next page shows, the distribution of the civilian workforce in the U.S. shifted considerably over the course of the 20th century. At they entered the century, close to 40 percent of employed Americans worked on farms. The industrial revolution was already underway, and the economic production that moved from farms to factories took men, children, and unmarried women with it; middle-class married women were generally expected to fulfill responsibilities inside their homes (Kain, 1990). As a result, workplaces tended to be homogeneous—mostly white, mostly male, and mostly married—with little pressure for diverse work arrangements.

Workers' decisions to seek paid employment away from home (where they had previously been their own boss) represented their entrance into a bargain with employers. In the first half of the 20th century, most markets for American goods were domestic and expanding. With little competition from abroad, many workers (certainly not all, and certainly not at all times) could

expect employment to be a long-term relationship. On average, workers saw steady improvement in their wages and benefits. Their children could expect incomes higher than those of their parents (Kochan, 2000). The marks of middle-class career success were mostly external: the company car, the corner office, the raise, and the promotion.

Beginning around the middle of the last century, the demographic landscape was transformed by the eruption of the baby boom. We have all heard that the prevalence of older persons in our population is rising. This is true: Instead of one out of every 20 persons being older than 65, as was the case at the beginning of the century, close to one out of every 10 persons is in that age category today (Tables 17 and 1413, U.S. Bureau of the Census, 1999). In 1900, the median age of the U.S. population was 23 years. By 2000, the median age had risen more than a decade to 35 (Table 13, U.S. Bureau of the Census, 1999).

The age structure has shifted. A century ago, the age structure resembled a pyramid, with large numbers of young people at the base and progressively smaller numbers of older people above. Now and for the foreseeable future, the age structure looks like a silo, with approximately equal numbers of persons younger than working age, of working age, and older than working age. This has two important implications.

First, the "care ratio"—the ratio of persons of working age (25-64) to those both older and younger— has decreased. In 1900, there was less than 1 person of working age for each younger person, but 10 persons of working age for each older person. By the end of the current century, the ratio of people of working age to young people will be about 1.4, but there will be fewer than 2 people of working age for every older person. Even though most

Age Structure Shift
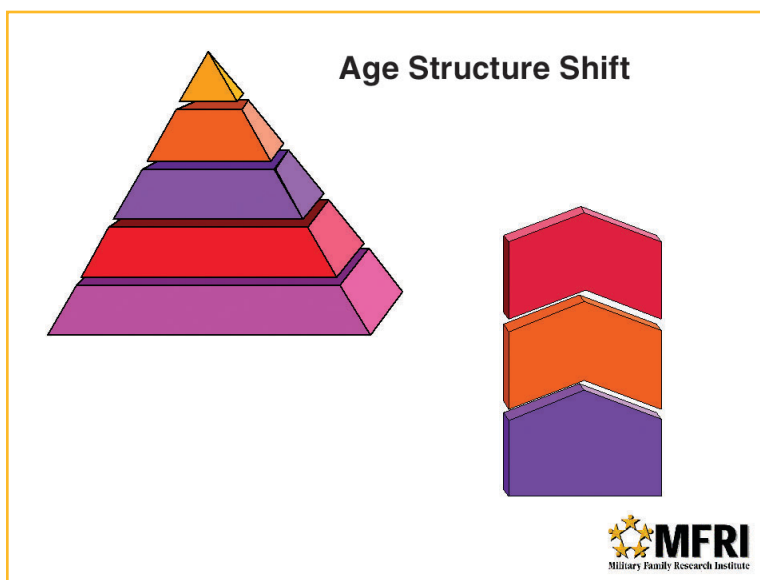
elderly individuals do not require daily assistance, the shifting care ratio means that when caregiving does need to be done, it will be distributed more heavily among people of working age. This is also true for the financial demands of caregiving: the Social Security system was designed for the pyramid, not the silo. In the future, individuals of working age (25 to 64) are likely to face increasing care responsibilities, and with most married families now containing two earners, there is less likely to be an adult available for full-time care work (Table 727, U.S. Bureau of the Census, 1997).

Second, although the birth rate in individual families has decreased, the population has continued to grow as a function of immigration and the children born to members of the baby boom generation. It is not the case that society's needs for day care centers and spaces in primary schools will diminish as baby boom families pass through the age structure (Tables 17, 1413, & 1420, U.S. Bureau of the Census, 1999).

Agriculture to Industry to Information to...

Percentage distribution of the economically active U.S. labor force 14 years +

Source: p. 34 The Myth of Family Decline, Kain, 1990
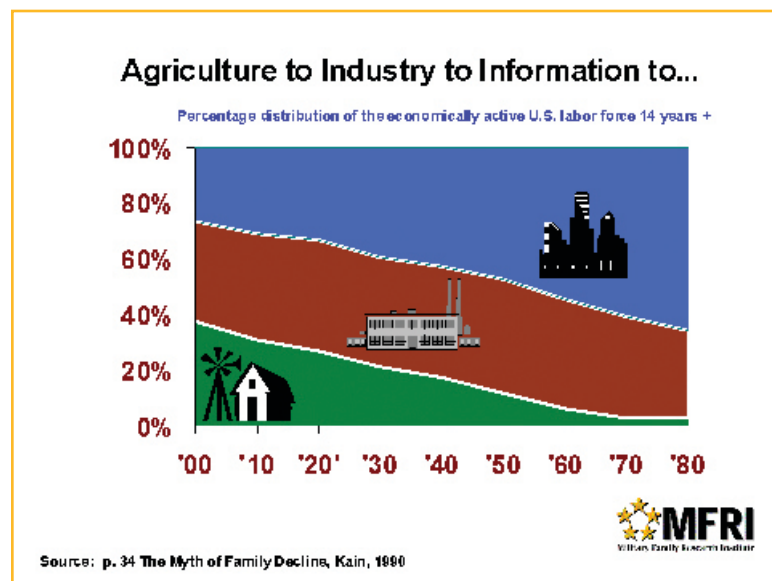
We will continue to need all of these facilities and increased capacity for care of older persons. Again, individuals of working age will be under pressure to cover these costs.

Another major demographic trend of the past and the current century is increasing diversity in the workforce. During the 20th century, the major source of new diversity in the workforce came from the steady entry of middle-class married women and then mothers of young children (they had been preceded by working class women and women of color). The labor force is now about 45 percent female, and women's participation rates are leveling off at a level only slightly lower than men's. Two-thirds of all workers are married; almost 1 in 2 lives with one or more children under 18 (Bond, Galinsky, & Swanberg, 1998). The gender-driven assignment of men to public and women to private activities has weakened to the point that few workers can claim immunity from home responsibilities while at work.

Now that the growth in women's labor force participation has slowed, the major source of new diversity in the workforce today and in the coming century is likely to be based on ethnicity. The proportion of whites in the labor force will fall from three-quarters to two-thirds, while the representation of Asian and Hispanic workers will increase substantially (Judy & D'Amico, 1997).

As the demographic landscape reshaped itself, the social contract workers could expect also changed. Technology and the globalization it has spawned have put pressure on employers to expel layers of managers and increase reliance on temporary workers who can be flexibly hired, assigned, and released. As competition has intensified and timelines have shortened, the silent bargain between employers and workers has become more contingent and less certain (Hall & Mirvis, 1995). Very few workers today can expect to spend their entire careers with a single employer. The new employment contract puts workers in the position of entrepreneur, selling their labor to the highest bidder, staying with that bidder as long as there is mutual gain, then moving on. Workers with advanced skills,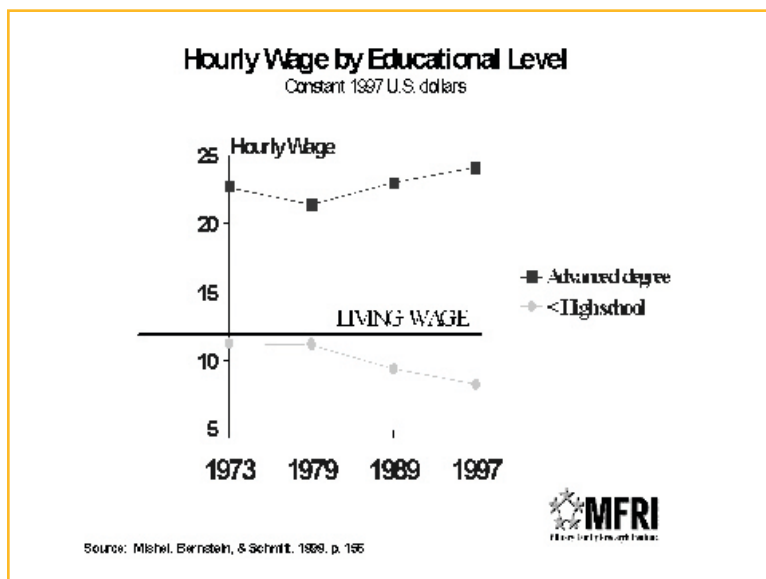 fresh knowledge, and lots of initiative can fare well in this system. But workers with limited education or skills, or with responsibilities that limit their workforce participation, may have to worry, particularly in the United States. The workforce is bifurcating—dividing into two kinds of jobs. The first offers high wages and benefits, but long hours. The second offers lower wages, fewer benefits, and worker protections, and will be more likely to be part-time, temporary, or on a contract basis. The first offers money but not time; the second provides time but little money. Workers today cannot confidently expect the upward mobility or even the stable employment that many of their predecessors enjoyed (Kochan, 2000). Life at work has become much

Family Income in the U.S.

Source: Table 1427 1999 Statistical Abstract
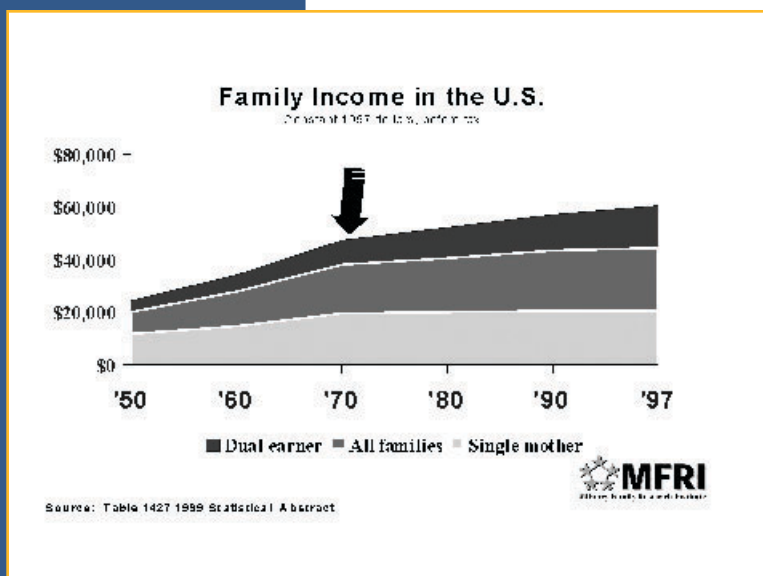
less predictable.

As workplaces have become more challenging, financial rewards have slowed. U.S. workers have seen only very modest increases in their real wages (i.e., corrected for inflation) in the past 30 years. As the figure on the previous page shows, aver-


Hourly Wage by Educational Level
Constant 1997 U.S. dollars

Source: Mishel, Bernstein, & Schmitt. 1999. p. 155

age family incomes leveled off in the early 1970s. Since then, the only families who have seen steady income rises are families with multiple earners.

Income rises are not only unevenly distributed across family types; they are also unevenly distributed across workers with different educational levels. The past 30 years have seen a progressive bifurcation of the workforce where lower-paid, less educated workers have fallen farther and farther behind, while a shrinking percentage of the highest-paid, most educated workers have become increasingly prosperous. In fact, the only group of workers to see increases in real wages since 1973 are workers with advanced degrees. Workers at the bottom are also having trouble finding adequate hours of work, losing hours during the past two decades while those of their higher paid counterparts increased.

Finally, workers today are confronting a labor market that offers less job security and lower job quality than was the case 30 years ago, as evidenced by the following series of figures. It is particularly discouraging for many workers that most of these declines continued during the robust economic growth in the 1990s.

Despite clear evidence that the environment has changed, and despite popular stereotypes of young workers, it is not yet clear that workers have changed, at least in the civilian world. Conventional wisdom in many circles suggests, for example, that "Gen X" workers (aged 18 to 32) have different (weaker?) work ethics than their counterparts of the same age 20 years ago. Data from the 1997 National Study of the Changing Workforce (Bond, Galinsky, & Swanberg, 1998) reveal consistency among workers of different generations. Young workers today are equally likely to have partners, although they are less likely to be married to those partners. They are equally likely to be parents: about 4 in 10 have children under 18. And they are more likely to have spouses or partners who are employed. Generation X workers today do, however, report working harder and faster than their predecessors. They are more likely to report working more than 40 hours per week. They are more likely to report not having enough time to get everything done. And they are more likely to report interference of their jobs with their personal and family lives.

Before considering the implications of these trends
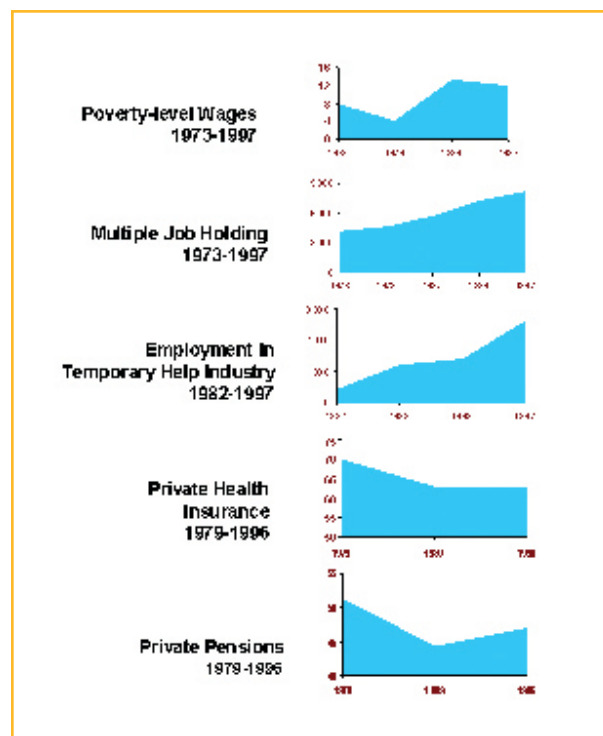
for the military social compact, we identify one last demographic trend: declining civic involvement. Robert Putnam (2000) recently published a book in which he expresses deep concern about a second time use trend of the century—the decline of involvement in voluntary organizations. Called **Bowling Alone**, the book documents decreasing participation in the political process, in recreational sports leagues, service clubs, and volunteer work. This decline is true, not only overall, but each succeeding generation has spent less time in these types of community activities than the one born before it.

A later, somewhat more nuanced analysis showed that individuals' declining participation was linked not to less trust in social institutions, but to less trust in other individuals. This is a worrisome trend for any society (Paxton, 1999).

In the aftermath of Putnam's book, it is worth considering another major aspect of time use: the rise of electronic media. Today, the average adult spends more than 20 hours per week watching television (Vanier Institute of the Family, 2000). It is worth asking what doesn't get done while this TV-watching goes on-probably not exercise, reading, building relationships with friends, or participating in voluntary organizations.

Implications for the New Military Social Compact

So, at the end of the 20th century, we are left with the curious juxtaposition of more life to live, but more and more of it lived away from others in small families and households. Families are likely to face increased demands for care in the coming years, but may be less able to provide it because of the financial necessity of multiple earners. Employers rely more and more heavily on workers' knowledge and discretionary effort, but workers have become less able to rely on long-term employment relationships and are less trusting as a result.
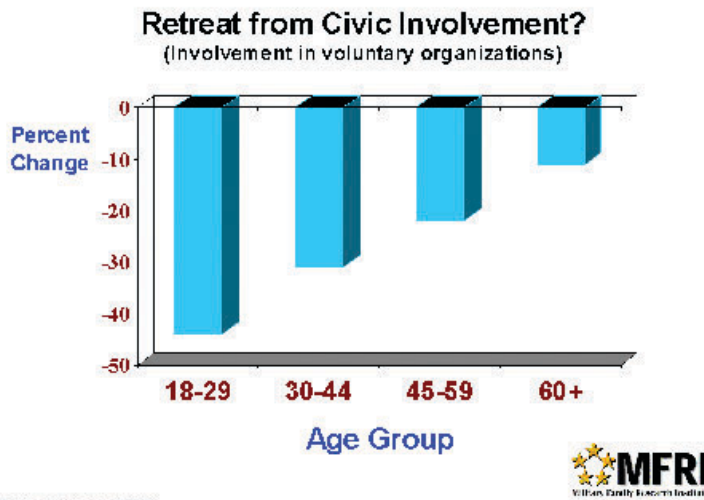
THE PSYCHOLOGY OF COMPACTS AND CONTRACTS

The social compact is essentially an agreement between the military and its members and spouses. Although it is not an agreement in any legal sense, it does present a set of mutual expectations for both parties. If the social compact is to have any meaning at all, its nature as an agreement must be taken

seriously by all parties.

There is extensive research on the psychology of agreements. That research generally goes by the name of psychological contracts. In the next few paragraphs, we will make some observations from research we believe is relevant to the DoD's efforts to develop its social compact.

Defining A Psychological Contract

A psychological contract can be defined as:

"An individual's beliefs regarding the terms and conditions of a reciprocal exchange agreement between that person and another party." Rousseau & Parks (1992)

This definition emphasizes the point that a psychological contract, or our social compact, is not just a promise; it is an exchange. A promise sets up an expectation of behavior. A contract sets up mutually interdependent expectations. As we will discuss later, the presence of mutual expectations often makes breaking a contract much more severe to the wronged party.

The use of the term "contract" might give the impression of a clear and objective agreement, but this is not the case. We are not talking about legalistic, documented agreements. Instead we are talking about perception, interpretations, and sense making. Violation of such psychological agreements can also produce strong emotional reactions.

Every psychological contract has three key elements

1. Promise

2. Payment

3. Acceptance

A promise is simply a statement of what one part can expect from the other. A promise becomes a contract when the second element, payment, is put in place. This addition of expected payment moves the transaction from promise to contract. Of course, one party's promise is the other party's payment. The mutual expectations and the provision of payment make the agreement stronger and also make violation of the agreement more problematical.

Finally, acceptance may be the most critical element of the psychological contract. In the absence of acceptance, the contract has no meaning. In most psychological contracts, the parties enter into the agreement voluntarily and thus initial acceptance can be expected. This is illustrated by the psychological contract of a new hire. However, when changes are introduced to the exchange after the relationship is already in place, and when those changes are instigated by one of the parties alone, acceptance may be very difficult. This may be a particular problem for the social compact now being discussed. If military members and their spouses see an existing compact in place, even if it has never been articulated, and they view the new social compact as an attempt by the DoD to change the framework of existing expectations, acceptance may be difficult regardless of the quality of the terms.

Transactional vs. Relational Contracts

When we examine different types of psychological contracts, we find that making a distinction between transactional and relational contracts can be useful. Transactional contracts are narrow in focus, usually of short and specific duration, and generally economic or extrinsic in the nature of the exchange. Normal, everyday work contracts, fixing a roof, remodeling a kitchen, etc., are of this type. However, work relationships can be of this type as well. Temporary employment is a good example. Even in long-term employment relationships, parties can frame the relationship in transactional terms. In such relationships, work

The Psychology of Compacts and Contracts

A Psychological Contract is defined as:

"An individual's beliefs regarding the terms and conditions of a reciprocal exchange agreement between that person and another party."

A contract is not just a promise, it's an exchange.

All contracts are fundamentally psychological.

"Such contracts are characterized by perceptions, interpretations, and sense making, and, in their violation, by strong emotions."

Source: Rousseau, 1992

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behaviors will focus very narrowly on job descriptions and payment will focus very narrowly on salary and benefits.

In contrast, relational contracts are broader in scope, longer and more open-ended in duration, more dynamic, and have more socio-emotional elements (loyalty, identity, etc.) in the exchange. Such relational exchanges are held together by mutual trust and can benefit from parties providing assets not narrowly defined by job descriptions.

For example, organizational researchers now understand that organizations function more effectively when employees go beyond the narrowly defined elements of their job descriptions in doing their work. Such behaviors, sometimes referred to as extra-role behaviors and sometimes as citizenship behaviors, include such things as mentoring new co-workers, staying overtime when needed, recruiting new employees, etc. These extra-role behaviors are essential to organizational effectiveness and are most likely to occur when the employment relationship is seen as relational as opposed to transactional.
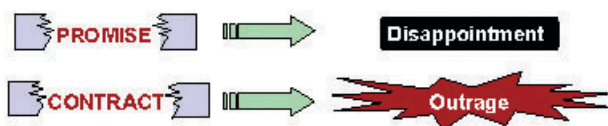

Clearly, relational contracts are more advantageous to both military members and the services.

The Psychology of Contract Violation

There is a major difference between the consequences of breaking a promise and violating a contract. Breaking a promise can produce disappointment. That disappointment may be substantial, if either the expectations were high or what was promised was very desirable, but disappointment is still the likely outcome. Violation of a psychological contract, in contrast, is likely to produce more emotional and intense reactions. Outrage and anger replace disappointment and the accompanying behavioral consequences are likely to be consistent with the more intense emotional reaction.

Importantly, relational contracts are more susceptible to perceived violation since they are less narrow and specific in their initial conditions. Perceived violation of relational contracts can reduce the trust between parties and can make it harder to

develop relational contracts in the future. They can also change interaction patterns from relational to transactional. In such circumstances, the advantages of relational exchanges are lost as the parties of the exchange come to define their relationship narrowly and legalistically.

COMPACTS IN THE CORPORATE WORLD

We found no empirical research documenting the evolution of the social compact in the military. As a result, we turned to the corporate literature for case studies. One area of corporate activity that has been addressing similar challenges and dilemmas is currently called "work-life."

The Families and Work Institute conducted research to track the path of the private sector through various iterations of a social contract regarding the interface between work and nonwork. So far, four stages have been observed, with the hint of a fifth on the horizon (Friedman & Johnson, 1997). This path does not appear to represent a required developmental sequence—organizations can jump in at any point and avoid some of the pitfalls encountered by their predecessors.

During Stage One, or the Programmatic stage, organizations tend to focus heavily on policies and programs. Often, an urgent need for child care becomes evident, resulting in the implementation of some form of assistance such as vouchers for child care or the provision of on- or near-site child care.

During Stage Two, or the integration, organizations realize that a single program is unlikely to solve all employees' work-life needs. Attempts are undertaken to construct a more comprehensive array of programs and to organize them into an integrated package.

Stage Three, or the Strategic stage, emerges when organizations realize that programs and policies are unlikely to be successful if the organizational culture impedes their implementation and undercuts their effectiveness. As a result, efforts to change the culture are the centerpiece of this stage.

During Stage Four, work-life efforts move to the core of the organization, rather than serving simply a support function. First Tennessee Bank, for example, has embedded its work-life strategy throughout the functions of the organization, from recruitment and retention, to evaluation of managers, and service to customers.

We don't yet know exactly what Stage Five will look like—some organizations are just reaching it. But there are hints that organizations will look beyond their own borders to the external community: improving the quality of the workplace by improving the quality of the community.

The progression just described is somewhat similar to that followed by the military in its own work-life efforts. As Albano (1994, p. 283) describes, "the military's relationship with its families from 1775 to 1993 has been characterized by a shift from neglect to concern; from informal mechanisms and implied obligations to formal, institutionalized policy response, and from locally determined, piecemeal, ad hoc, reactive measures to federally funded, comprehensive, planned services."

Any successful organizational change effort requires the early definition of the desirable outcome—the "ideal end-state." The military's construction of a new social compact is no exception. A group of experienced corporate leaders in the work-life field undertook this exact exercise several years ago and developed a set of four "principles of excellence" (Corporate Work-Family Roundtable, 1996).

One of the key features of these principles is that

What's the "ideal end-state"?

- Employer recognizes strategic value of addressing work and personal life

- Work environment supports work and personal life effectiveness

- Management of work and personal life effectiveness is shared responsibility between employer and employee

- Employer develops relationships to enhance external work and personal life resources

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they specify the ends, but not the means, of effective work-life efforts. A vision for the future will not be sustainable if it is too tightly tied to specific policies, programs or practices. A sustainable vision recognizes that different means will be needed in different circumstances to achieve the same ends. A sustainable vision provides a litmus test against which specific strategies can be measured—the degree to which they produce the desired ends is the ultimate arbiter of quality.

Here are some precise targets for intervention. The bars in the figure below show three indicators that together explain about a third to half of the variance in tension between work and family (Bond, Galinsky, & Swanberg, 1998). The figure shows that tension is indexed by job demands, which have to do with the amount of work, the need to routinely work very hard or very fast, the number of hours it requires, and the frequency of travel or overtime with little advance warning. The second component is job quality, which includes autonomy, learning opportunities on the job, the degree to which the job is meaningful, job security, and opportunities for advancement. Higher job quality is associated with lower tension. The final component is workplace support, which includes a supportive culture and supervisor, positive coworker relations, lack of discrimination, respect received in the workplace, and flexibility. These three aspects of work are much more strongly related to worker outcomes than earnings or access to benefits.

The Tension Recipe
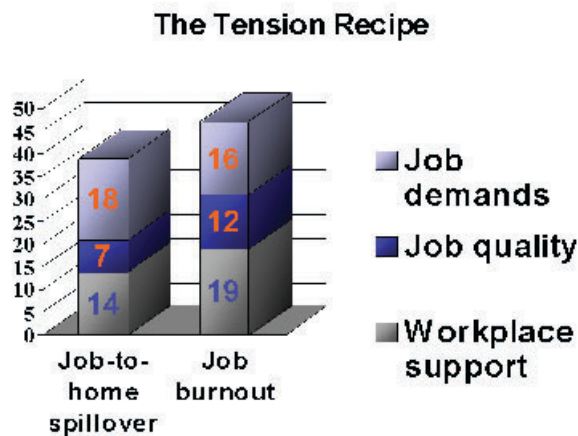
Baxter Healthcare Corporation recently conducted a detailed study of its own employees that offers some interesting insights regarding workplace interventions (Campbell & Koblenz, 1997). Though not subjected to peer review, the study used a large (for this type of research; about 1000 workers) sample and multiple methods that were generally rigorous. These workers are not representative of the labor force, however; they tend to be better-paid and more educated than average.
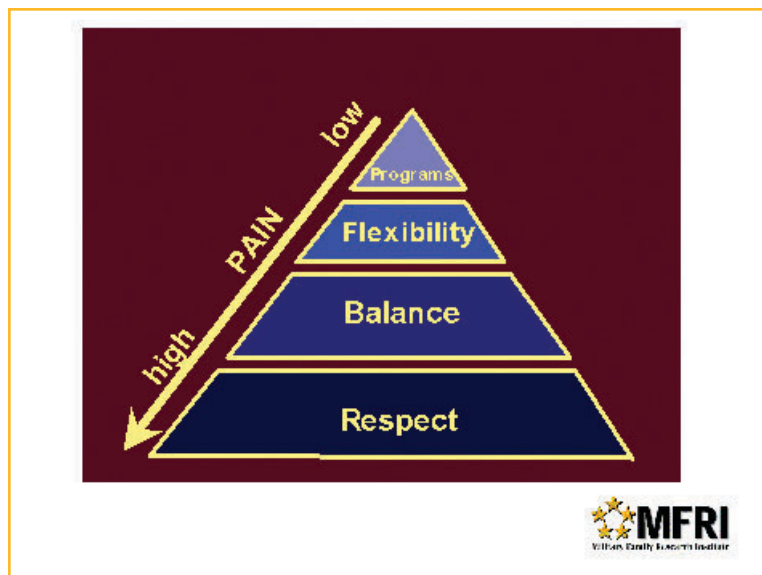
The lower pyramid on the next page depicts one set of findings. The responses from employees revealed that some aspects of the work experience were defined as "entitlements" and some were defined as "benefits." What is considered an entitlement versus a benefit varies from workplace to workplace—it is embedded in the organizational culture. But the point of the diagram is that the return on investments in work/life interventions, and the risk associated with those investments, depends upon which component is being considered. As the authors of the study explain:

"Those components which are perceived as an entitlement will not, when addressed, provide a positive return to the organization because employees believe they are "owed" those components and should not have to be grateful for them. However, not addressing the components which are perceived
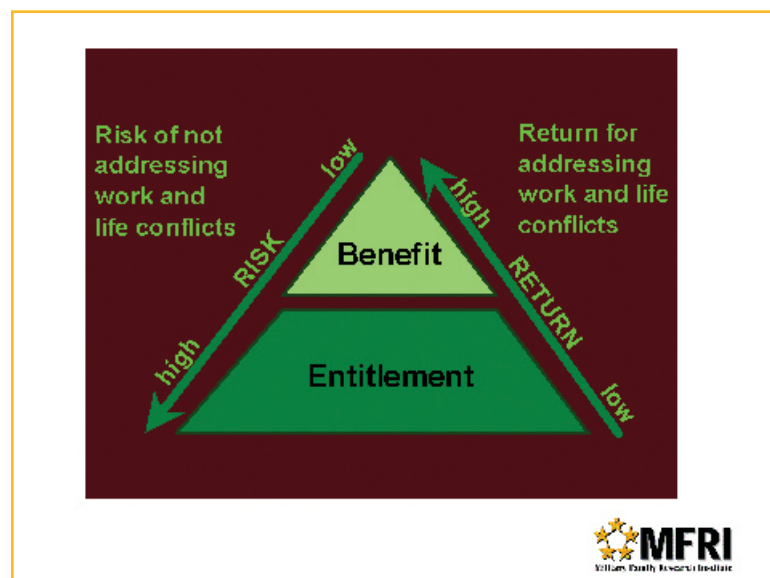
as an entitlement is a potential risk for the organization. Employees who believed they did not have the components to which they are entitled reported turnover, apathy, low productivity, vandalism, or sabotage, self-focus, and an unwillingness to go the extra mile. Those components which are perceived as a benefit have a high return on investment when they are addressed. However, similar to Maslow's Hierarchy of Needs, the benefits will not be perceived as benefits unless the entitlements are in place. Without the entitlements, the benefits will be perceived as "lip service."

The adjacent slide depicts the actual views of Baxter employees. As the slide shows, employees see "Respect" as an entitlement and "Programs" as a benefit, with "Balance" and "Flexibility" falling in between. Employees reported feeling disrespected, for example, when rules seemed to indicate mistrust,

when expectations seemed arbitrary or inequitable, or when their time or effort was not respected. Attendance policies and accountability often provide examples of disrespect. The "pain" experienced by Baxter employees increased as the pressures or violations of expectations moved down the pyramid to the entitlements perceived as most fundamental.

American workplaces today operate on the basis of several traditional assumptions which have provided lucrative material for the author of the Dilbert cartoon. In a telling example, Catbert the Evil HR Director is speaking to a worker. "Alice," he says, "The experts say you need to balance work and home life. You worked 80 hours last week. That's less than half of the hours in a week - give us some balance, you selfish hag!" (Adams, 1998). Some of these traditional assumptions are listed below (Friedman & Galinksy, 1992).

Lotte Bailyn from MIT and her colleagues at several other universities demonstrated impressive results when they challenged these assumptions in several organizations for a recent Ford Foundation study (Bailyn, Fletcher, & Kolb, 1997; Bailyn, Rapoport, Kolb, & Fletcher, 1996; Rapoport & Bailyn, 1996). They used one key question to launch their organizational change efforts. This question made it possible for employees to propose new ways of working that took into account both their strong expertise in how to do their jobs better and the complexity of the responsibilities they were juggling. The question allowed workers to put the previously taboo subject of family responsibilities on the table. Invoking this simple question represented not only a way to make change, but also a hopeful vision for a brave new world of work and family. The question was:

What is it about the way work gets done around here that makes it difficult or easy to juggle work and personal life so that neither one suffers?

Instead of this:

- *Keep your personal problems at home*
- *Give them an inch and they will take a mile*
- *Equity means the same for everyone*
- *Benefit programs cannot make people more productive*
- *Presence = performance*
- *Hours = output*

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This:

What is it about the way work gets done around here that makes it difficult or easy to juggle work and personal life so that neither one suffers?

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Creating a new social compact is a challenging task, and there are very few written models upon which to draw. One example of a CEO's articulation of his company's social compact is the quote below from Randall Tobias when he led Eli Lilly and Company. This corporation regularly appears on the Working Mother 100 list, often in the top 10. Tobias received the CEO of the year award several years ago.

"You can ask people to leave their personal lives at the factory fence—in the old days, that was the culture of most corporations—but you're just kidding yourself if you think they can comply. You can't hire part of a person. You get the sore back along with the skillful hands. You get the anxious heart along with the educated brain. So, your policies and programs will only be effective if they bow to this reality and address the whole human being. The bottom line is that our efforts to support employees' work-family priorities are good business. These are neither 'perks' nor 'giveaways.' These tools will help us attract, motivate,

and retain people who are more likely to be more dedicated, more focused, more innovative, and more productive"

(Windecker-Nelson & MacDermid, 1998).

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APPENDIX C
FAMILY-CENTERED EMPLOYMENT
A SURVEY OF CURRENT PRACTICES

Prepared for the Department of Defense, by Joyce L. Gioia, CMC and Roger E. Herman, CSP,CMC, Consulting Futurists, The Herman Group. August, 2001.

EXECUTIVE SUMMARY

Competition to attract and hold talented employees has inspired employers to engage in practices that were hardly thought of in the past. The world of employment has changed considerably in the past few years . . . and will continue to change in the future. Responding to shifting values among employees and their families, employers have become increasingly family-friendly. Wise employers are selectively adopting new practices to strengthen their relationships with the workers they want to keep. Investment in these approaches makes sense for morale, efficiency, continuity, and bottom-line strength. Turnover is reduced and productivity is enhanced.

BACKGROUND

Employers in the private sector have become increasingly sensitive to the intense, competitive nature of employment today. The market has changed dramatically, and the current economic slowdown has merely dampened the trend temporarily. As the economy heats up again in 2002, the employment market will become more volatile.

The fundamental problem today is that there are more jobs to be filled than there are people to fill them. The situation is exacerbated by the fact that many people are not qualified for the jobs that need to be filled. This shortage of trained people intensifies the competition. Corporate executives have become more strategic in their approach to the employment market, recognizing that attracting, optimizing, and retaining good employees is their competitive edge in a turbulent world.

To make themselves more attractive, employers are making significant changes in their compensation and benefit packages, while they modify their corporate culture and modernize leadership styles. Some employers have become quite creative in an effort to differentiate themselves from competitors—the many other companies that could employ the same people they want.

Research has shown that time has become a more valuable commodity to workers. When asked if they would rather have more time or more money, 48 percent of the respondents to a recent survey indicated that time was more important to them. This evidence supports the trend that American workers want more life balance.

Lifestyle values of American workers are changing. People want more time for themselves and their families, more time at home. This development was accentuated by the events of September 11, 2001. Now there is even more interest in being well-rounded . . . enjoying the many activities and benefits of living in our communities, in our society. In the vernacular of the day, they "want a life."

CURRENT CONDITIONS
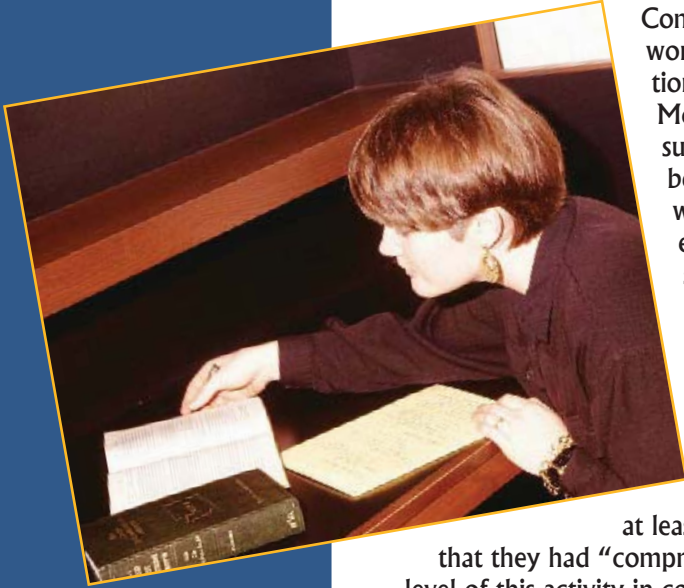
Companies have responded by offering a variety of work-life benefits. In 1997, Work & Family Connection, together with Whirlpool Foundation and Working Mother Magazine, conducted the nation's first and only survey to find out how representative companies had been evaluating their work-life programs and practices, what they felt they had learned, and their priorities for evaluation in the future. The purpose was not only to shed light on the current state of evaluation in work-life, but also to determine the impact of work life initiatives in order to provide some direction for the future. Respondents from 153 companies reported on their evaluations of 40 different programs, policies, and practices.

In the findings, 94 percent indicated that they had at least "some work-life initiatives" and 43 percent said that they had "comprehensive and well-established work-life efforts." The level of this activity in companies has, of course, increased in recent years. Employers—in both the public and private sector—who want to "connect" with today's employees cannot afford to ignore this competitive proactive strategy.

BENEFITS OF FAMILY FRIENDLINESS

There are substantial benefits that accrue to employers who invest in family-friendly initiatives. Among them are:

★ Enhanced employee satisfaction and morale

★ Improved productivity

★ Enhanced commitment

★ Enhanced recruitment

★ Reduced absenteeism

★ Reduced turnover

★ New mothers return to work [sooner]

★ Improved diversity, inclusion, and sense of community

★ Decreased health care costs

★ Enhanced managers' skills.

EXAMPLES

The following list, while comprehensive, is not a complete accounting of family-centered support being offered by employers today. Creative employers seeking to position themselves as Employers of Choice® in a turbulent workplace environment are developing innovative initiatives on an ongoing basis. This representation is intended to provide some insight into the kinds of value being offered today.

The Whole Person (supporting the employee supports the family)

★ **Wellness/prevention programs**

- Exercise facilities
- Intramural sports programs
- Massage therapy
- Manicure and pedicure services
- Nutritionists, dieticians
- Fitness center, on-site or subsidized off-site, staffed with professional trainers
- Work-life training for employees

★ **Convenience services**

- Concierge services
- Car wash on-site for employees
- Laundry service
- Dry cleaning service
- Fifty percent discounts at local movie houses
- In-house bakery
- Take-home meals (paid)
- A two-hour meal break during the workday to tend to personal business
- A week's paid vacation for newlyweds
- Free lunch

★ On-site travel agency

★ ATM machines and postage available at worksite

★ An on-site, gourmet, low-cost restaurant (free take-home meals)

★ Van service for employees

★ **Support for Spouses**

- Employment support services
- Tuition reimbursement
- Wellness programs

★ **Dependent Care—Children**

- Parenting seminars
- Subsidizing adoption
- Paid leave for adoptive parents
- Paid paternity leave (up to one-year)
- Paid maternity leave (up to one-year)
- Job-back guarantee for new mothers
- Flowers to the new mothers
- $1,000 savings bond in the baby's name and other baby gifts
- Lactation rooms
- Childcare resource and referral
- On-site child care center (in some cases free)
- Paid time off to attend teacher conferences
- Van service for children
- After-school care
- Financial assistance for child care
- Parenting support groups
- Subsidized emergency care in-home, in a facility, or at the worksite
- Summer day camp

- Tutoring for children

- College counseling

- $3,000 a year toward college tuition

- Summer jobs for employees' children

- On-site and field trip activities for children during school holidays

★ **Dependent Care-Elders**

- Elder care assessment and case management

  ♦ Elder care resource and referral

  ♦ Elder care seminars

  ♦ Elder care support groups

  ♦ Subsidized emergency adult care in home or a facility, worksite

- Van service for seniors

★ **Dependent Care—Pets**

- On-site petcare

- Petcare subsidized in a nearby facility

- Pets allowed in the workplace

★ **Flexibility**

- Paid time off bank

- Holiday Bonus Option whereby employees can cash in sick days

- Alternative work schedules

  ♦ Part-time options

  ♦ Job sharing

  ♦ Compressed workweek

  ♦ Telecommuting

★ **Communications**

- Intranet (Xylo.com)

- Computer access for employees on the road

- Purchase of computers for all employees

- Extra computer support for students (employees and their children)

★ **Family Support**

- Family orientation

- Buddy, sponsor, mentor families

- Company-sponsored family social events

  ◆ Family movie night

  ◆ Picnics

  ◆ Trips to amusement parks, museums, day and evening cruises

  ◆ Building floats for community parades

  ◆ Square dances

- Support of youth activities such as scouting and 4-H

- Long-term care insurance and life span counseling

★ **Counseling**

- Employee Assistance Programs

- Financial counseling

- Career planning for employees and spouses

- Prepaid legal services

★ **Diversity Support/Emphasis**

- Training

- Pot-luck events featuring ethnic foods, dances

- Multi-cultural celebrations

★ **Education**

- Spousal education

- Offspring education: company-sponsored field trips

- Tuition reimbursement and scholarship programs for employees

- Tuition reimbursement and scholarship programs for dependents

★ **Ombudsman**

- Independent support systems for employees and families to solve problems

★ **To effectively provide a family-friendly workplace, organizations must:**

- Focus on results, outcomes and the value the employee adds to measure performance, rather than by hours worked or "face time."

- Use increased work flexibility and empowerment to reward employees who have earned trust and respect.

- Institute policies that do not penalize employees for reasonable absences when they are making an effort to remain involved in their children's education.

WHAT SHOULD BE DONE?

Each employer must decide how much effort and resources to invest in family-centered endeavors. Leaders must make their decisions based on a variety of factors, including

★ Corporate culture and management style

★ Company characteristics (size, location, etc.)

★ Fiscal concerns

★ Workforce composition

★ Evidence of work or family stress

★ Employee preferences

★ Labor market issues

★ Available community resources

★ Corporate-community relationship

★ Competitive employment market conditions

It is clear that the trend will be toward more support for work-life balance and family centeredness. Savvy employers understand that maintaining a stable, happy workforce is a competitive advantage and, in many cases, an operational necessity. The time of taking employees for granted is gone. To attract, optimize, and retain top talent, employers will emphasize a more comprehensive relationship with the people who will work for them. With a wide range of employment opportunities available, people will make conscious choices about where they will—and will not—work, often based on the availability of these very policies and services.

As companies—and government organizations—utilize more sophisticated technology and self-initiated human resources to accomplish work, selection of employees will become more critical. To be able to select people who meet the employer's standards, leaders will have to drive a culture that makes employment with their organization highly attractive. Attending to employees' personal and family concerns will strengthen the relationship with workers-present and future.

The nature of today's military operations suggests that more sophisticated recruits will be needed, men and women with education, skills and talents, and technical expertise. Those special people will be in high demand, since they're the same caliber of applicants sought by business and industry employers. Those employers are prepared to offer a smorgasbord of enticements to build and maintain the capacity of their workforces. To compete, the various components of the Department of Defense must gain a deeper understanding of their enemy in the war for talent—in this case, other employers ranging from the local small business to Microsoft and WalMart. That knowledge must then

be applied aggressively to strengthen positioning in the employment market, reaching both current and future employees with a new, caring, and responsible message.

This overview report was prepared by Joyce L. Gioia and Roger E. Herman, Certified Management Consultants and Consulting Futurists concentrating on workforce and workplace trends. They are principals of The Herman Group, Greensboro, North Carolina, and Professional Members of the World Future Society. They have authored 10 books, including the award-winning How to Become an Employer of Choice. Roger and Joyce are sought-after speakers and commentators on trends and workforce stability, (http://www.hermangroup.com). (c) 2001, The Herman Group.

APPENDIX D
UNDERWRITING FAMILY SUPPORT: POLICIES AND PUBLIC LAWS

http://mfrc.calib.com/socialcompact/ufs

The link above will take you to a searchable database of policies and public laws "Underwriting Family Support", maintained by the Office of the Assistant Secretary of Defense, Military Community and Family Policy. The database contains internet links to policies and public laws relevant to the new Social Compact. Where available, the database will link you directly to the Web site location or the full text copy of the publication. The database is searchable by document number, source, subject area and key words.
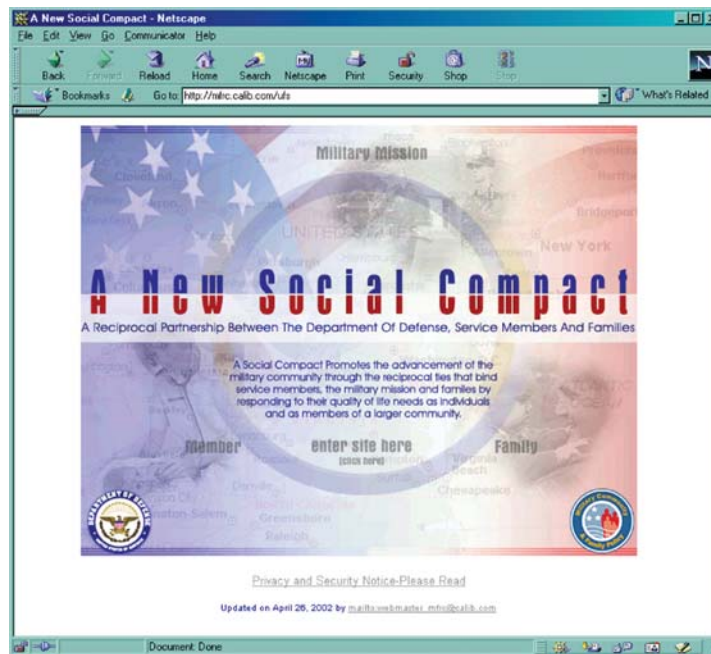

The following subject areas are available for searching:

Child & Youth	Military Assignment Policies
Commissaries & Exchanges	Military Child Education
Communications & Technology	Relocation Assistance
Family Services	Reserve Forces
Financial Training	Spouse Employment
Fitness & Recreation	Transition Services
Health Affairs	Voluntary Education
Housing	

Once in the database you will be able to search on a variety of identifiers and print a report of your search results. If you need assistance, please call an Information Specialist at the Military Family Resource Center – 703-602-4964 or email mfrcrequest@calib.com.
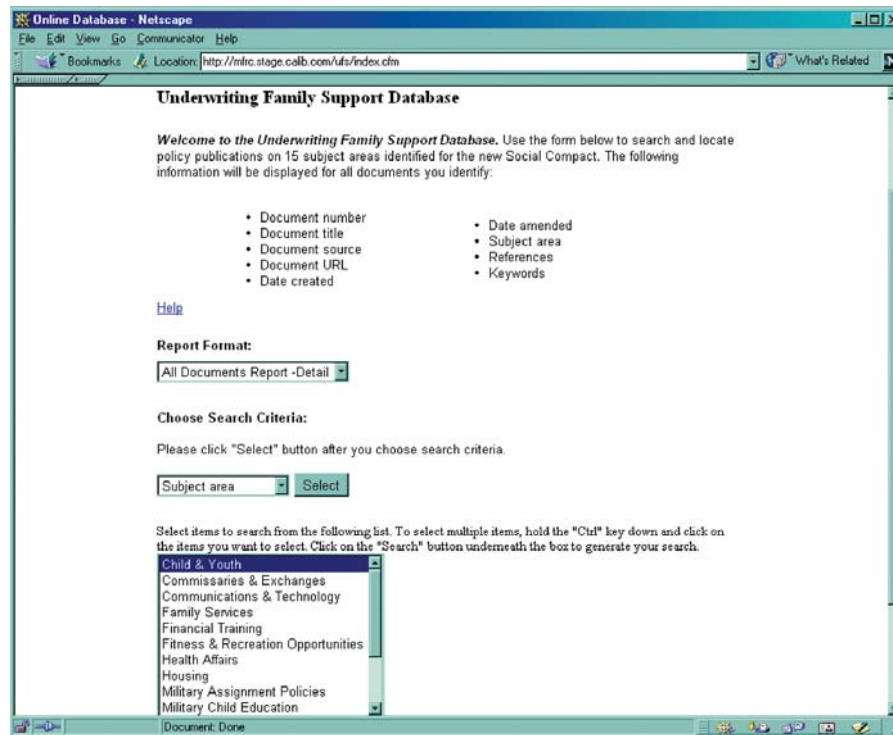
APPENDIX E
SOCIAL COMPACT PARTICIPANTS BY SERVICE/AGENCY

US ARMY

Greta Anderson	Rex Becker	CSM Stephen Buckley	Carla Carey
Jo Ellen Cerney	LTC Steve Clark	Jerry Haag	Howard Haney
Delores Johnson	Robin Johnson	M.A. Lucas	Sylvia Lyles
Janet MacKinnon	Teri Maude	George McKimmie	Mary Ellen Pratt-Phillips
COL Gaston Randolph	Dian Stoskopf	Isaac Templeton	Maurice Thomas
Rick Thomas	P.K. Tomlinson	Nancy Whitsett	Shirley Young

US ARMY RESERVE

MAJ Scott Paradis

US NAVY

Mike Berger	Gwen Boyd	Chris Cairns	Bill Coffin
Janet Fagan	Barry Hoag	Steve Keating	CAPT Vincent Musache
Pam Nemfakos	Kelly Powell	Ed Pratt	Susan Roberts
Ileen Rogers	Ed Roscoe	Bruce Sherman	Kathy Singletary
Buster Tate	Tom Yavorski		

US NAVY RESERVE

CAPT Bill Couch

US AIR FORCE

Martha Salas	Lt Col Douglas Anderson	Linda Brown	Pam Collins
Bill Cornell	Capt John Cronin	Maj Jay Doherty	Capt Chip Dunbar
Beverly Houston	Lt Col Stephen Jones	Eliza Nesmith	Shontelle Rivers
Beverly Schmalzried	Linda Stephens-Jones	Mary Beth Storer	Jim Sweizer
Col Steve Waller	Col Steve Zander		

US AIR FORCE RESERVE

Steve Landry

US AIR NATIONAL GUARD

Col Cora Jackson	CMSgt Mike Waters

US MARINE CORPS

Karen Ayers	Evonne Carawan	Maj Kirk Coker	Trevor Cornpropst
Karen Damm	Antigone Doucette	Capt Roger D. Edwards	Kathy Facon
Cathy Ficadenti	Brian Goodson	Belinda Jones	Jim McHugh
LtCol Sid Mitchell	Karen Morgan	Kathy Nuzum	Mary Page
Capt Chris Reite	Lt Danisha Robbins	Don Roberson	Dennis Sherrod
Vernon Taylor	Dale Thompson	Erin Walerko	

US MARINE CORPS RESERVES

Maj Mark Lockridge

US COAST GUARD RESERVE

LCDR Linda Ingram

ARMY AND AIR FORCE EXCHANGE SERVICE

Bob Ellis   Bill Reid

CALIBER ASSOCIATES

Virginia Addison	Sally Cowan	Angela Huebner	Susan Kerner-Hoeg
Ann Landy	Suzanne Lederer	Debby Lewis	Deborah Levin Mancini
Jay Mancini	Bill Merrill	Harriet Perrine	Leslie Peterson
Anne Nelson	Lenna Reid	Barbara Rudin	Judith Walton
Melissa Zwahr			

DEFENSE COMMISSARY AGENCY

Dan Sclater

DEFENSE MANPOWER DATA CENTER

Robert Brandewie

DEPARTMENT OF DEFENSE EDUCATION ACTIVITY

Taffy Corrigan   Bob Ray   Georgia Williams-Scaife

DEPARTMENT OF DEFENSE JOINT CHIEFS OF STAFF

LtCol Mike Hayden

EMPLOYER SUPPORT TO THE GUARD AND RESERVE

Bart Buechner   LtCol King Gillespie   Steve Schilling, MCPO

MILITARY FAMILY RESOURCE CENTER

Donna Fairbrother   Tracy Myers

MILITARY FAMILY RESEARCH INSTITUTE, PURDUE UNIVERSITY

Shelley M. MacDermid, M.B.A., Ph.D., Co-Director   Daniel J. Beal, Ph.D.
Howard M. Weiss, Ph.D., Co-Director   Rachelle Strauss, Ph.D.

NATIONAL ENDOWMENT FOR FINANCIAL EDUCATION

Harry Sherr

NATIONAL FOUNDATION FOR CREDIT COUNSELING

Kathy McNally

NATIONAL MILITARY FAMILY ASSOCIATION

Joyce Raezer   Lillie Cannon

NAVY EXCHANGE AND COMMISSARY

Alex Douvres

OSD

Beth Baird (CPP)   Greg Pharr (CPMS)   Jane Hoover (MPP)

OSD HEALTH AFFAIRS

Maj Henri Hammond   Ron Richards   Ed Chan

OSD HOUSING AND ENERGY

Mike McAndrew   Phyllis Newton

OSD MILITARY COMMUNITY AND FAMILY POLICY

Col Marcus Beauregard	Jane Burke	Aggie Byers	CDR Rene Campos
James Ellis	Meg Falk	Amanda French	Bill Gleason
Dori Hays	Tony Jurney	David W. Lloyd	John Molino
David Mitchell	Rebecca Posante	Carol Potter	Brian Ross
George Schaefer	Jean Silvernail	Ollie Smith	Anne Tarzier
Otto Thomas	Barbara Thompson	Carolee Van Horn	Jean Marie Ward
Janis White	Jan Witte		

OSD RESERVE AFFAIRS

Maj Ian Ferguson   COL Steve Fisher   COL Jim Scott   COL Kate Woody

RUNZHEIMER INTERNATIONAL

Allan Bateson   Adlore Chaudier

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