

Measuring the Human Dimension of Unit Effectiveness – The Unit Morale Profile

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Background

Since 1996, the Canadian Forces have been administering the Human Dimensions of Operations survey to Canadian Forces personnel deployed on Peace Support operations. Measuring dimensions such as morale, cohesion, confidence in leadership and stress, amongst others, the Human Dimensions of Operations survey provides Commanding Officers with a tool to measure and monitor important human dimensions that affect operational readiness and effectiveness of deployed units.

While proven to be an effective tool, the Human Dimensions of Operations survey is quite specific in its target population (combat arms) and environment (being war-like conditions) and could not easily be adapted to the garrison environment. Recognizing this, the Operational Effectiveness and Leadership (OEL) section of Director Human Resources, Research and Evaluation (DHRRE) undertook a project to develop a survey to examine the 'Human Dimension' of military effectiveness across the wider Land Command environment.

Model Conceptualization

A primary requirement necessary to conceptualize unit effectiveness (the human dimension) was the development of a model. In developing the model, which is not conclusive and continues to undergo review as data is gathered and analyzed, emphasis was placed on predictors, effects and outcomes associated with unit effectiveness with each examined across three levels: organizational, group and individual. This model has formed the basis for the development of the Unit Morale Profile and ongoing research.

Currently titled the Unit Morale Profile, recognizing morale as being a composite of many psychological factors and as a means of differentiating it from the Unit Climate Profile, the title is under review as it does not conform to the more general use of the term 'morale'. For now, however, the instrument will be referred to by its acronym 'UMP'.

UMP Administration

The UMP is a group-administered questionnaire with a current administration time of approximately 45 minutes. While the questionnaire has been translated into French (recognizing the Canadian Forces Bilingual policy), all respondents to date have completed the English version. The format of the survey allows it to be completed by both uniformed and non-uniformed members of a unit (acknowledging the increasing number of Defence civilians within the military environment). The survey is administered in pencil and paper format and currently requires manual data entry. Frequency, agreement and satisfaction likert type scales are used throughout the survey.

UMP Dimensions

In its present format, the UMP measures 14 dimensions as follows:

Role Stress: Derived from the Occupational Environment Scale – Form F2 (Osipew & Spokane, 1983), the measure examines five aspects of Role Stress: 1) role ambiguity; 2) role conflict; 3) role overload; 4) role insufficiency and 5) role responsibility for others. The instrument consists of 24 likert type items assessed across a frequency scale.

Work Motivation: The Work Motivation Scale (Pelletier et al, in press) measures motivation from a self-determination perspective. It consists of 6 sub-scales measuring Intrinsic Motivation, four forms of Extrinsic Motivation (Integrated, Identified, Introjected and External) and Amotivation. The instrument consists of 25 likert type items measured across an agreement scale.

Job Satisfaction: The job satisfaction scale used in the UMP is derived from the Job Satisfaction Survey (Spector 1985). The instrument consists of 31 likert type items assessed across an agreement scale.

Psychological Distress: The Psychological Distress Questionnaire (Dompierre, J. et al, 1993) measures general symptomology and non-specific pathology by examining the prevalence of symptoms over a two week period. The scale consists of 29 likert type items rated across a frequency scale.

Quality of Life: The Quality of Life instrument is derived from an earlier Quality of Life survey (Dowden, 2001) developed within the Canadian Forces. The instrument asks respondents how they feel about twelve particular life domains rated across a likert type satisfaction scale.

Leadership Style: The scale used in the UMP is the Bass Multifactor Leadership Questionnaire Military Format (Bass & Avolio, 1995). This instrument measures a broad range of leadership styles using the most commonly employed measure of transformational and transactional leadership. The instrument consists of 45 likert type items measured across a frequency scale.

Confidence in Leadership: The five items of this scale are taken from the Unit Climate Profile, a component of the Human Dimensions of Operations survey, which was developed within DND and is currently used by the Canadian Forces Land Command units on operations. Confidence in leadership is measured on two levels: garrison and operations. Employing a likert type agreement scale, this instrument assesses confidence both up and down the chain of command.

Cohesion: Derived from the Group Environment Questionnaire (Caron et al, 1985) four dimensions of cohesion are assessed: 1) individual attraction to the group; 2) individual attraction to the task; 3) group integration (social); and 4) group integration (task). The instrument comprises 18 likert type items assessed across an agreement scale.

Communication: Derived from the Communication Satisfaction Questionnaire (Downs, 1998), the communication measure examines three factors, 1) general satisfaction with communication; 2) effectiveness of communication forums; and 3) satisfaction with subordinate communication. The instrument comprises 16 likert type items measured across an agreement scale.

Climate: The Organizational Climate Questionnaire was derived from a questionnaire used within the Department of National Defence (Villeneuve & Gingras, 1998) to examine Officer Cadets' perceptions of organizational climate at the Royal Military College of Canada. The questions assess six dimensions of organizational climate as it currently exists in the unit and how important each of these dimensions are for the respondents to be effective in their work. The dimensions are: 1) involvement; 2) consideration; 3) efficacy and fairness of rules; 4) quality of feedback; 5) autonomy and 6) recognition/encouragement. The instrument consists of 26 likert type items rated across an agreement/importance scale.

Preparedness for Deployment: This scale, developed internally within DHRRE, measures three dimensions: 1) respondents' confidence in their capacity to perform their job in an operational environment, i.e. job readiness; 2) respondents' confidence in the equipment they would have in an operational environment; and 3) respondents' confidence in Department of National Defence (DND) assisting their families while the member is deployed. The instrument consists of 20 likert type items assessed across an agreement scale.

Perceived Organizational Support and Organizational Commitment: The Perceived Organizational Support Questionnaire – Short Version (Eisenberger et al, 1986) and the Allen and Meyer's Affective and Continuous Commitment Scales (Allen & Meyer, 1990) are combined in the UMP to provide a measure of commitment and perceived organizational support. The instrument consists of 31 likert type items assessed across an agreement scale.

Job Performance: The Job Performance Questionnaire developed within DHRRE examines perceptions of job performance across three levels: 1) individual, 2) group and 3) unit. The instrument consists of 10 likert type items assessed across an agreement rating scale.

Retention/Attrition: Adapted from the Intent on Staying Questionnaire (Bernard, 2001), the Retention and Attrition Questionnaire asks respondents to describe their current career intentions relating to job, unit and organization. The instrument consists of 7 likert type questions assessed across an agreement scale.

In the main, the instruments used to measure each of these dimensions are instruments used both in organizational and research environments with demonstrated reliability and validity. As required, minor changes were made to these instruments to adapt them to the military environment. Where no instrument existed to measure a specific dimension of interest (e.g. Preparedness for Deployment) one was developed internally. The UMP also collects demographic data and data surrounding Personnel tempo (time away from home) and Operational Tempo (time away on operations).

Application of UMP Data

Unit Diagnostic. The UMP is primarily designed as a diagnostic instrument allowing the Command structure an insight into the strengths and limitations of the unit through the opinions, perceptions and beliefs of unit members. As the main focus of this paper, this will be discussed further momentarily.

Performance Measurement Framework. A secondary role in capturing the softer (attitudinal) measures of the Department of National Defence's Performance Measurement Framework (PMF) is also anticipated. Both DND and each of the environments have developed Performance Measurement Frameworks following the Balanced Scorecard Approach. While 'hard data' such as Budget Management is fairly easy to measure, it is not as easy to measure the softer (attitudinal) components of a PMF such as 'Well-being of the Team'. Consistency across the PMF Performance Drivers and UMP measures affords a means of providing aggregate data, on an annual basis, as qualitative measures of these attitudinal aspects of the PMF.

In its primary role the UMP is a diagnostic instrument and, as previously mentioned, aims to assist the Commanding Officer to identify strengths (to capitalize upon) and limitations (requiring attention) within the unit. It should be remembered that this is only one of many tools available to the command structure. In many instances it is a confirmation of what is already known about the unit, learned through effective leadership practices. Sometimes, however, how unit members feel, their attitudes and beliefs etc. may not be readily observable to the command structure. As an anonymous, confidential survey, the UMP is a means of allowing respondents to openly voice their opinions and beliefs.

Reporting and Use of Results

Data collected through the administration of the UMP is analyzed within DHRRE and a comprehensive report provided to the Commanding Officer. Where possible, verbal briefings on results are also provided. A 'Commanders Guide to the UMP' has also been produced which accompanies the report providing further information on the dimensions measured.

Result from the UMP provides two primary sources of information for the Command structure. Firstly, results examine each dimension independently to provide an overview of the status within the unit, e.g. the predominant type of leadership style displayed, the level of role stress in the unit etc. For each dimension measured, mean scores across each of the factors are detailed verbally and presented graphically. Key findings elicited from individual questions are also brought to the attention of the Commanding Officer.

Secondly, relationships across dimensions are examined and guidance provided on how changes relating to one dimension may positively or negatively impact on other dimensions. For example, analysis may indicate a clear relationship between communication style in the unit and how it impacts on job satisfaction and job stress of unit members and ultimately retention. Where data indicates a relationship such as this, the report would highlight how addressing limitations evident in the unit's communication could be expected to enhance job satisfaction, decrease job stress and positively impact unit retention. This example is rather simplistic but illustrates the value of the UMP in providing information beyond simple descriptive statistics.

Confidentiality Considerations

As has already been indicated, the UMP is a diagnostic tool designed to assist the Command structure. It is not a formal evaluation of the unit and is not used as a component of the Commanding Officer's Performance Evaluation. It is for this reason that the results are provided only to the Unit Commanding Officer. Requests for data by higher command are not entertained to protect the confidentiality of the Commanding Officer and the integrity of the UMP.

Respondent Feedback

While results are provided back only to Commanding Officers, they are encouraged to provide feedback to the unit. To facilitate this, a Power Point presentation is developed and forwarded to the Commanding Officer with the report. Survey fatigue, and a concern surrounding the burden of surveys is topical within the Canadian Forces at present. It is the experience of DHRRE, however, that the burden of surveys is amplified through the lack of feedback on survey results and how the results will be applied to the work environment.

Providing feedback to respondents and including them in discussion of strategies to address limitations or promote strengths, as evident in results, allows for a sense of 'ownership' amongst respondents and a greater willingness to contribute to a more effective work environment. Providing feedback on responses also allows for confirmation that the results are an accurate reflection of unit members' opinions and allows further exploration of issues that may not have been fully apparent in the results, or which respondents wish to discuss further.

UMP – The future

Introduced into the Land Command environment in July 2001, the first twelve months in the life of the UMP have effectively been a trial period. Over this period, the UMP has been administered to five units of varying composition and size. Six hundred and eleven respondents have completed the survey to date.

Responsiveness to the UMP has been mixed. Some skepticism has been evident questioning how the UMP can value add beyond normal leadership practices as well as concerns being expressed about confidentiality and potential for the results to be used as an evaluation of the Command structure. Within those units having employed the UMP the responses have been positive with the Command structure, for the most part, receptive to the results and the information provided.

A major limitation from the perspective of the Command structure is that no normative data is currently available. A priority for DHRRE in the coming months will be to gather more data and work towards establishing norms. Further, the administration time required to complete the UMP remains of concern to both the Command structure and the researchers. With a continuing accumulation of data, DHRRE will undertake a review of the instrument specifically examining the psychometric properties and value of the individual measures with the aim of removing duplication and reducing the administration time. More recent discussions are also examining the utility of developing the UMP for electronic administration.

Conclusion

Senior leadership within the Canadian Forces has expressed endorsement for an instrument that supports to the Command function. While acknowledging that further work is required to address the identified limitations of the UMP, it is anticipated that this survey will replace the Unit Climate Profile providing a generic instrument to assess unit effectiveness, from a human dimension, across both garrison and operational environments.

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