

## Measuring Morale within the French Army

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### **ABSTRACT**

*The evaluation of the operational capability of the Army passes by that of its various components and, particularly, by its human dimension. This element is appreciated, between others, by the morale of personnel and units. Owing to three measuring tools, all modes of consultation are implemented so that the command can gather and exploit a dependable and quality information : the point of view of the leaders, as their function of command, the opinion of the presidents, as representatives of category, but also the opinion of the biggest number by the principle of direct consultation. They then allow the command to take appropriate measures at the earliest to ameliorate collective effectiveness and, as far as possible, the wellbeing of all.*

### **INTRODUCTION**

The evaluation of the operational capability of the Army passes by that of its various components and, particularly, by its human dimension. This element is appreciated, between others, by the morale of personnel and units.

Morale can be defined as follow : the individual or collective psychological state resulting in a strong positive mobilization and enthusiasm to achieve a task.

To be relatively complete, the evaluation of morale takes into account three levels of perception:

- the first concerning the individuals, whom certain concerns can be approached only by the confidentiality of discussions or individual opinion polls such as those of the Center of human relationships (CHR),
- the second about the categories of persons, which can be acquired by the consultation of the various representatives of category,
- the third linked to the considered human group, for which the leader is alone in position to appreciate what is positive or negative compared to the purpose of mission.

With this intention, the French Army uses collective tools, the report on morale (in French, RSM) and the measuring instrument of unit morale (in French, O2MF), and an individual tool, the biennial survey « Life in the Army » (in French, VAT).

Owing to these three tools, all modes of consultation are implemented so that the command can gather and exploit a dependable and quality information : the point of view of the leaders, as their function of command, the opinion of the presidents, as representatives of category, but also the opinion of the biggest

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number by the principle of direct consultation during the round tables of the RSM and questionnaires of O2MF and VAT.

The definite knowledge of the factors which consolidate or, contrariwise, weaken morale is essential because it directly informs the leader on the degree of aptitude of his unit to fulfil the mission. It then allows to take appropriate measures at the earliest to ameliorate collective effectiveness and, as far as possible, the wellbeing of all.

### **1.0 GENERAL ORGANIZATION OF THE MONITORING OF MORALE**

To follow the evolution of morale and in order to inform the command permanently, with different but complementary means, three main tools are implemented :

- the biennial survey « Life in the Army » (VAT) which measures the individual satisfaction of the personnel by the technique of direct consultation,
- the report on morale (RSM) which represents the evaluation of authorities in situation of command on the morale of the past year,
- the measuring instrument of unit morale (O2MF) which represents a direct consultation (by questionnaire) of a sample of all categories of military and civil populations.

#### **1.1 The survey « Life in the Army » (VAT)**

Modelled by the Center of Human Relations (CHR) of the French Army Staff in 1986, this survey is regularly updated according to the evolutions of the Army. It consists in a large-scale survey performed by questionnaire every 2 years to 10000 soldiers of the Army representing all categories, indicated by drawing of lots. It gives a rigorous approach of the morale of the individuals and particularly major evolutions noticed for 2 years.

The interest of this tool is to allow the command :

- to assess the satisfaction of the soldiers,
- to take a census of their opinions, aspirations and motivations and to understand their waitings in the fields related to status, military condition and daily life,
- to surround strong evolutions since the previous investigations of the same type,
- to constitute a data bank and to orientate its action and its decisions, more particularly in the sense of significant fields and categories.

#### **1.2 The report on morale (RSM)**

This regularly updated tool solicits a half of the army every year, by alternation. It provides a collective measure of the morale of units by privileging the evaluation of authorities in situation of command.

The report is strictly restricted to 4 pages maximum (including flyleaf) and must include inevitably, on one hand, the point of view of authority and the perception of morale by category, on the other hand, measurements taken at its level of responsibility to answer problems raised by the subordinated echelons.

RSM has five essential purposes :

- to represent the overall assessment related by the authority into situation of command on the " collective morale " of his unit and more especially on its evolution,

- to highlight satisfactions and major concerns of this authority (mission, career, personnel, equipment, training, activities, facilities) which have an influence on the operational capacity of unit,
- to inventory the "category-specific" factors, i.e. the favourable or unfavourable elements which affect the morale of the different categories of personnel of unit,
- to submit to the upper echelons issues and possible suggestions concerning the particular situation of ordered unit,
- to spread in return to the subordinated levels the results of RSM as well as taken measurements. This communication enhances the feeling of membership in the same community "Army" and trust in hierarchy.

### **1.3 The measuring instrument of unit morale (O2MF)**

O2MF corresponds to the biannual "photography" of the morale of the Army. It is about a very simple probing tool to be implemented, which is addressed to approximatively a quarter of the personnel of an unit (representing all categories), indicated by drawing of lots and joined together, for this purpose, during half an hour. It consists in a questionnaire gathering the dimensions of morale ; the participants will first have to allocate a note of satisfaction in each of the dimensions, then classify them according to the importance they grant to them.

The interest of this tool meets three aims :

- to regularly inform the command about the evolution of morale,
- to make available statistical information on the morale of a unit,
- to allow the Regiment commander to have a quantified balance sheet of contentment and concerns of the unit he commands.

## **2.0 THE DIMENSIONS OF MORALE**

To take into account the complexity of the human factor, in the developments of the theories of individual satisfaction, the Center of Human Relations has divided morale in 15 dimensions. These dimensions allow to translate the subjects of concern of the military and civil personnel.

### **THE 15 DIMENSIONS OF MORALE**

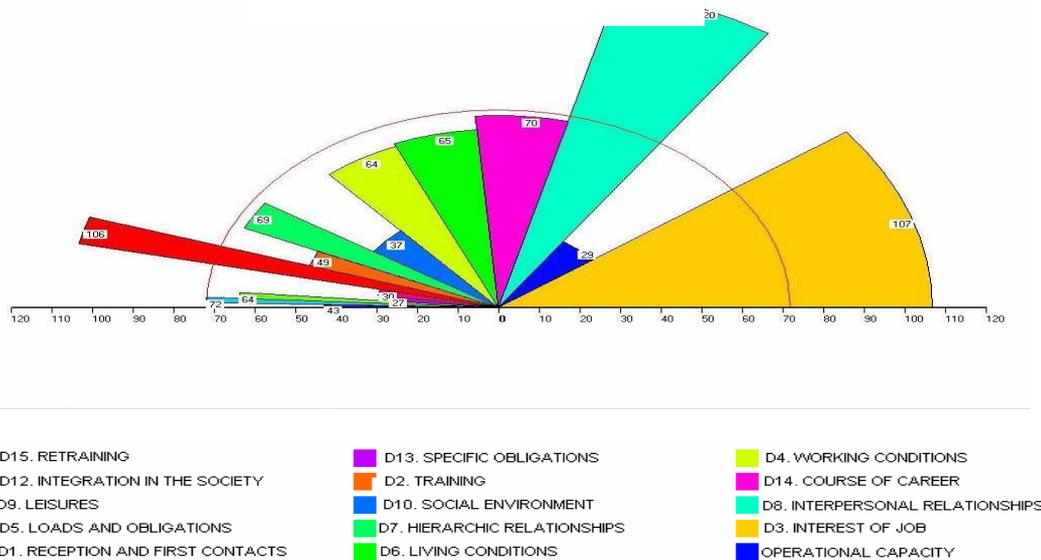
- D1. Reception and first contacts in the organism of assignment.
- D2. Initial and complementary training of the military and civil personnel.
- D3. Interest of job.
- D4. Working conditions (organization, rhythm, means, enrollments).
- D5. Loads and obligations of the service.
- D6. Living conditions (balance, allowances, accommodation, feeding).
- D7. Hierarchic relationships with the leaders.
- D8. Interpersonal relationships (between comrades, between civilians and servicemen).
- D9. Leisures and possibilities of relaxation
- D10. Social and family environment.
- D11. Operational capacity of units (preparation, training, equipments).
- D12. Integration of the servicemen in the society.
- D13. Specific obligations (discipline, availability, mobility).
- D14. Course of career.
- D15. Retraining.



- the level of satisfaction detailed for each of the 15 dimensions, showing the importance that the category attaches to each one of them. One differentiates clearly the domains that they consider positive and those that preoccupy them more particularly,
- the compared evolution of satisfaction over one selected period.

These data are provided in the form of a synthetic production directly exploitable by the general chief of the Army and concerned offices of the central administration (category-specific panels).

The graphic presentation of the structure of satisfaction by dimensions is so called “in tail of peacock”.



It allows to collect 4 types of information :

- the importance attached by the personnel in each of 15 dimensions (materialized by the value of the angle of the different domains); reading is made from the right to the left, from the dimension considered as the most important to the dimension considered as the least important,
- the level of satisfaction in each dimension materialized by the length of the ray,
- the comparison of satisfaction in each dimension compared to the total satisfaction materialized by the red half-circle.

The graph of the year 200x also allows to compare the results with those of the previous survey or previous years. So it allows to determine the variations of satisfaction by dimension (increase, stability, fall)

Independently of the satisfaction they express, the individuals determine themselves the importance they attach to the different dimensions of morale. This choice reflects a personal order of preference translated on a scale by coefficients of importance which sum is equal to 100.

This presentation allows to treat on a hierarchical basis and to differentiate the bulk of the accessory. The analysis of the results lightens the domains to be ameliorated first and foremost for each professional category.

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### 3.2 The report on morale

This evaluation of morale leans on :

- the personal observations performed by the authority in situation of command (training, examination, inquiries, studies, various contacts),
- the reports of the authorities of subordinated levels.

Category-specific informations are collected from meetings - one for every category of personnel of active or of reserve - organized at the only level of Regiment (or equivalent) and not subordinated basic units. This information is merged in every hierarchic echelon.

Generally, the evaluation of the authority in situation of command is consistent with the one of the presidents of category. If the authority did'nt agree with the appreciation carried by one or several presidents of category, he would have a "right of reply " reached with RSM in which he exposes his point of view.

In order to allow a rational and consistent exploitation, RSM is established on a structure identical to all echelons of hierarchy.

Two parts are enclosed :

- 1<sup>st</sup> part (4 pages maximum, including flyleaf) :
  - **Evaluation of morale and its evolution :**

The evaluation of the level of morale rests upon the attribution of a note from 1 to 9 matched by a qualifying adjective.

Execrable	Very bad	Bad	Quite bad	Medium	Quite good	Good	Very good	Excellent
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It is essential to define the evolution of morale. It is therefore necessary, to make the appropriate comparisons from one year to the next, to use following terms :

Strong fall	Fall	Moderate fall	Stable	Moderate rise	Rise	Strong rise
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Besides these normative aspects, the authority will be able to, in his convenience, use all expressions wanted to qualify better the morale of his subordinates.

- **The point of view of the authority and factors which varied the morale :**

The evaluation related to the evolution of collective morale results from the exam of the changes which affect the major elements. The list of 15 dimensions is proposed to make easier the job of the officers who establish RSM, but it can be completed by the individuals.

- **The morale of the subordinates, by category of personnel, such as it is perceived by the authority :**

The specific reasons of satisfaction or dissatisfaction of the categories of military and civil personnel will be recalled, by avoiding possible redundancies with the second sub-part.

- **The measures taken by authority to answer the concerns of his subordinates :**

This sub-part, is intended to inform the subordinates of decisions which authority could take at its level to answer waitings of the personnel.

In this opportunity, the authority returns account at the higher level of the encountered difficulties and transmits requests which exceed his level of responsibility.

- **Three appendices of a maximum page, written respectively by each president of category (officers, noncommissioned officers, servicemen) :**

To promote the authorities of internal dialogue, all presidents of categories write a one-page-synthesis to the attention of the General, chief of staff on the morale of their category. They also serve for informing the Regiment commander.

The presidents assess, by using the previous grids, the level and the evolution of the morale of their category. They display the most notable motives of contentment or discontent. They conclude by pointing out satisfaction or major difficulty which they meet in the exercise of the job. This part is joined to the report of the Regiment leader, who has a right of reply in case of disagreement with one of the presidents.

The reservists are currently also linked to the realization of a category-specific synthesis.

With a view to lightening, the Company leaders do not write report anymore on morale but are invited to express themselves to the Regiment commander who gathers them for a meeting exempt from any formalism.

- 2<sup>nd</sup> part :
  - the inventory of the category-specific factors, worked out according to the procedure of meetings,
  - the name of unit (or units) with their enrollments.

The concerns of the personnel of the Defence partly comply with those of his fellow-citizens. It results a big need of transparency and visibility, guarantee of trust and consideration. The institution cannot stay away from this evolution.

The need of information is a general and permanent concern. Internal communication must set out to answer it in a most adapted manner. Resting on a requirement of transparency, it concerns the hierarchic echelons which, at their level, have to bring an answer to questions mentioned in the report on morale of their subordinates.

This short and simple point of situation (2 - 3 maximum pages) must answer the concrete concerns of the personnel.

In this frame, the communication of the results of RSM is organized at three levels :

- Central level : the General, chief of the Army staff, addresses a written answer to all the units of the Army in which he draws up a balance sheet of morale and introduces measurements concerned with his level.
- Intermediate hierarchic echelons : the intermediate hierarchic echelons respectively follow the same procedure for all units placed under their orders. This answer, written in coherence with that of the General, chief of the Army staff, is total and single for all units placed under their command. It mentions following points :
  - the morale and its evolution for the considered command,
  - the subjects of satisfaction and dissatisfaction in the fields of skill of the responsible authority,
  - the measures taken or to be taken to put correct the problems of his level.
- Local level : the Regiment commanders announce, to all their subordinates, the contents of the report on morale that they transmitted to their official authority (if it is the case), and (at any rate)

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the answers received from the upper echelons. This procedure is not exclusive of a communication left on their initiative with their heads of departments, Company leaders, presidents of category, etc...

Moreover, downward communication allows to reduce hierarchic distance and to enhance individuals' cohesion who feel themselves listened and better understood.

Dialogue must therefore rest, in all echelons, on a more living, more reactive cooperation, closer to the ground, to abolish the feelings of frustration or distrust.

### 3.3 The measuring instrument of unit morale

The measuring instrument of unit morale (in French O2MF) is a complementary instrument of the report on morale (in french RSM). It was created in 2001 to provide the command an updated information (twice a year) on the evolution of morale. Its methodology is similar to the survey VAT but was reduced to allow a greater speed of data processing. It is very helpful for the Regiment commanders as part of a better knowledge of their subordinates.

This tool must respect some criteria :

- allow the direct expression of the personnel,
- allow the evaluation of the morale of each category of military personnel and civilians,
- introduce an explicative character to understand evolutions of morale,
- keep on being simple in implementation to restrict the duty of Regiments.

This tool is conceived to be used in a autonomous way by the Regiment, in the form of "performance indicators". Its interest is to measure the morale either globally for the group or in detail by category of personnel. O2MF is a tool very easy-to-use. The officer in charge of its implementation lays out for this purpose of a software provided by CHR.

To fulfill the individual record sheet, each individual must perform 2 operations :

- Give an evaluation (column 2), with a note from 1 to 9, on the satisfaction which brings him each of 15 dimensions (do not use the note 0 or figures with comma). Two dimensions or more can receive the same note of satisfaction.
- Classify the 15 dimensions (column 3) from the least important for morale (coefficient 1) to the most important one (coefficient 15). Two dimensions should not have the same coefficient, it is necessary to cut short.

Example : At first, it is a question of expressing his satisfaction in each dimension. The dimension "first contacts with the organism of assignment" is considered very satisfactory ; it receives the note 8. "Military training" brings a medium satisfaction ; it is noted 5. And so on up to the 15<sup>th</sup> dimension (the reconversion).

In second time, one classifies the 15 dimensions in the order of importance which it exert on morale. So, for instance, the dimension "first contacts with the organism of assignment" is considered to be the least important. One allocates it the coefficient 1. The dimension "possibilities of relaxation" is also considered to be far from important ; it is classified 2 (1 is already used) and so on up to the dimension considered the most important for the morale, for instance, the « work performed in main job » which will be classified 15.

A dimension can be considered secondary (coefficient between 1 and 6) but collect a note of high satisfaction (8 or 9 for instance). Also, a dimension can be considered very important (coefficient between 10 and 15), but acquires a weak note of satisfaction if it causes dissatisfaction. The importance of a dimension and the satisfaction that one person can withdraw from it are two very distinct notions.

In the end of questionnaire, the individual must inscribe a figure corresponding to the total evaluation of morale in the bottom of the sheet (box in fat). It is recommended to the participants to point out shortly in the back of the chip some positive or negative elements, the most important on their morale for considered period.

The validity of results is conditioned by the effective participation of all categories of personnel. The Regiment commander will take care to retain in each group the representative of category. Other participants will be drawn of lots among all units or services by following a mode of precise sampling. Each category of military personnel will be gathered to fill the record sheet during about half an hour. It is a question of collecting the individual opinion of each member, then to place the sheets filled under envelope (if possible) without any apparent external sign before giving them to the officer responsible for the fusion of results. The respect for anonymity is fundamental so that the results are not irregulars.

All counting, syntheses and modes of presentation are performed by a protected software.

The officer responsible for this work also carries out a synthesis of the elements (suggestions and personal remarks) that could have an influence on morale. Final results represent 15 chips which will remain the property of the Regiment. They are not sent to the upper echelon.

They can be presented to the inspectors at their request and constitute an element of information for the Regiment commander.

The amalgamation of several dozens Regiments at central level allows to acquire incontestable statistical results. Used twice a year in complement of RSM, this tool allows the command to be permanently informed (every four months) on the evolution of the morale of the Army.

## CONCLUSION

These three scientific, different but complementary tools, inform the command permanently of the evolution of the morale of the personnel of the Army.

They allow to the leaders of different levels to know the concerns of personnels and to take appropriate measures as soon as possible to ameliorate collective effectiveness and, as far as possible, the wellbeing of all.

These tools have been supplemented in January 2002 by a more reactive telematics pool. It concerns a representative sample of 4000 designated personnels renewed each year. It gives in a week the precise point of opinion on a particular subject (retirement, professional stress).

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### INDIVIDUAL RECORD SHEET (O2MF)

**INSTRUCTIONS:** Deliver your personal opinion (not that of the Regiment or unit).

1	2	3	4	5	6	7	8	9
execrable	Very bad	Bad	Quite bad	medium	Quite good	good	Very good	excellent

column 2 : note each dimension of 1 (execrable) to 9 (excellent), according to the table below (the zero note being excluded) according to your level of satisfaction.

column 3 : point out the importance you attach to each of 15 dimensions from 1 (not very important) to 15 (very important). There should not have ex aequo and the classification must be rigorous. Caution ! The 15-note is allocated to the field you consider the most important, then 14, 13 until 1 which is the one you consider the least important.

Give your filled sheet, possibly under envelope, to the responsible officer.

COLUMN 1 (dimensions)	COLUMN 2 level of satisfaction (notes from 1 to 9)	COLUMN 3 Importance 1 (less important) 15 (more important)
- The first contacts with the organism of assignment (prior information, selection, reception and taken care).		
- The military training of the personnel (initial training, further training and preparation for exams).		
- The work performed in main job (interest, utility, clearness of tasks, responsibilities).		
- Working conditions (organization, working rhythm, means, enrollments, friendliness).		
- The loads of the everyday life (internal service and of security, additional activities).		
- The material conditions of life (accommodation, environment, feeding, equipment, various material opportunities, sells off and remuneration).		
- Relations with the comrades and the subordinates (climate, mutual aid, cohesion).		
- Relations with the superiors (information, possibilities of expression, understanding, mutual respect, consideration).		
- The possibilities of relaxation (means of the garrison, unit, home, clubs, sports, permissions).		
- Social welfare system.		
- The operational capacity of units (preparation of the personnel, equipments, effectiveness of units, education, training).		
- The integration of the servicemen in the society (opinion of the civilians, behaviour of the servicemen, opening of the army, public relations).		
- Inherent obligations in the military state (regulations, availability, mobility, specificity of the system of presentation).		
- The course of career of the personnel (choice of units, allocations, jobs, notation, progress).		
- The possibilities of retraining in civil life (measures of assistance, validation of acquired competences, human experience).		

Register in the box below, by a note from 1 to 9 (according to the grid in the top of page), the level at which you evaluate your morale on the whole.

Personal suggestions and remarks : main reasons which, according to you, influenced moral (to be registered at the back of the leaf).