

Integrated Research Design Prospectus

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Section 1: Introduction

a. What intellectual, practical and personal goals will this study accomplish?

(Think big picture)

Intellectual Goals: Contribute to leadership literature about the need to put the mission first when making accountable decisions that impact national security, regardless of political, geopolitical, or societal emerging factors. Gain insight into what gaps may exist in the understanding of sensemaking that is constrained by external factors. Secondly, gain insight into how the framing and shaping of narrative contributes to the decision-making process of eligible candidates who have propensity to serve.

Practical Goals: Search the literature to obtain an objective and pragmatic perspective on why the mission of recruiting and retention has become more challenging at varying times in our history. I also want to provide a perspective grounded in literature, metrics, and feedback that gives leaders an avenue to shaping the way they approach strategy.

Personal Goals: Examine the factors that create challenges to the efforts of the US military to recruit and retain eligible members to ensure the national security goals of the nation. As a retired military member who still has two children serving, I feel invested in understanding the issue on a personal level as well.

b. What problem(s) will the study address and why it is important to address

this? (What is the big point of the research?)

The problem that will be examined is to simply ask how executive leadership in military recruiting and retention use sensemaking to plan for and react to challenges in their ability to maintain the personnel necessary to execute the strategic goals and ensure the security of the United States.

Section 2: Conceptual Framework

a. What are the most important theories, ideas, and knowledge that inform this study? (3 most important themes)

1. The theory is that political, geopolitical, and societal directly affects the military's ability to successfully recruit and retain the necessary number of people for the mission.

Impact:

Political – Gen Z are living through political turmoil and polarization

Lee, C. A. (2024). *Introduction to the US Army War College Civil-Military Relations Center. Parameters*, 54(2), Summer 2024.

Letendre, L. A., & Abramson, H. (2022). *Negotiating social change: Backstory behind the repeal of don't ask, don't tell*. University of Florida Journal of Law & Public Policy.

Vest, T. A., Ivey, M. F., Musch, K. L. E., & Tyler, L. S. (2023). *Differentiating between accountability and responsibility*. American Journal of Health-System Pharmacy

Geopolitical – Gen Z have grown up during instability and war across the geopolitical sphere

McMahon, C. J., & Bernard, C. J. (2019). *Storm clouds on the horizon*. *Naval War College Review*, 72(3), 84-100.

Peterson, A. L. (2022). *General perspective on the U.S. military conflicts in Iraq and Afghanistan after 20 years*. *Military Medicine*, 187(9/10), 248-258.

Societal – Generational differences influence, societal changes, eligibility to serve, & propensity to do so

Holmes, R. M. Jr., Waldman, D. A., Siegel, D. S., & Pepe, J. A. (2022). *Declining trust in capitalism: Managerial, research, and public policy implications*. *Academy of Management Perspectives*, 36(4), 984–1006.

Vergun, D. (2024, January 31). *Official says DOD aims to promote service in its recruiting message*. DOD News. Retrieved from

Nguyen Ngoc, T., Viet Dung, M., Rowley, C., & Pejić Bach, M. (2022). *Generation Z job seekers' expectations and their job pursuit intention: Evidence from transition and emerging economy*. *Business Management*, 14, 1–13.

b. How have these shaped the study? (What is known about these?)

Political: Since 2015, when many of them were coming of age, Gen Z has witnessed the rise of the MAGA movement, the COVID 19 epidemic, the contested election of 2020, the events of January 6th, the botched withdrawal from Afghanistan, heated debate about

social issues, and again a contested election in 2024. They are currently living through the aftermath of the attack on Israel by Hamas on October 7th, 2023.

Geopolitical: This generation has also lived through an era where the Global War on Terror has been ongoing for most of their lives. This experience influences their decision-making process. Confidence in the military is at its lowest point ever and this unfortunate milestone occurs directly after the post GWOT era.

Societal: Generational differences influence Gen Z's decision-making process. Only a limited number are eligible to serve. Of that eligible number, the propensity to do so is diminishing.

How these three factors have affected their decision-making processes is the first question. How the military uses sensemaking to understand and create recruiting and retention strategy is the second.

c. What is your conceptual framework for the study, and how does it use and incorporate these?

The conceptual framework for the study focuses on recruiting and retention executive leaders. The study will examine how they use sensemaking to strategize and ensure the military has the personnel required for its mission. All their decisions, and the ability to carry them out, are at the mercy of factors beyond their control to a seemingly large degree. They do not create the political, geopolitical, and societal factors that impact their potential candidate's decision making. They are responsible however for the policy and strategy of successfully recruiting and retaining military personnel.

d. What do we not know that your study will address?

The aspect of how military leaders use sensemaking to create policy and strategy is potentially constrained in a way that other executive leadership positions are not. They serve in a system that does not give them final and ultimate authority to make decisions. Because of the dynamics of the American political system, their ability to plan beyond four-to-eight-year windows of time do not allow for long term strategic planning. What I am interested in is the tension between military and political leadership. What I mean by tension is that the military leadership has a very pragmatic goal, assigned by the leadership they serve. The interesting question is how they navigate in this environment and to what degree the extreme shift in policy constrains their ability to create pragmatic strategy and lead effectively.

Lopez, C. T. (2024, May 2). *DOD looks outside bureaucracy for novel talent management concepts*. DOD News.

Refai, D., Korsgaard, S., Villares-Varela, M., Williams, N., Al-Dajani, H., & Harima, A. (2025). *Entrepreneurial agency in constrained contexts: An introduction and review of the literature*. International Small Business Journal

Weick, K. E. (1995). *Sensemaking in organizations*. Sage Publications.

Section 3: Research Questions

a. What do you want to learn by doing this study?

The basic research question is:

How do recruiting and retention executive military leaders use sensemaking to create a strategy to overcome recruiting challenges?

Supporting questions are:

Are military executive leaders constrained in their ability by a unique dynamic that does not exist in other organizations?

How do the non-pragmatic aspects of political, geopolitical, and societal influence factors their ability to navigate those factors and create strategy that is mission oriented?

What is the influence of political, geopolitical, and societal factors on those who are eligible and have a propensity to serve?

What is the influence of those who give advice to candidates who do have a propensity to serve in terms of advising them to do so or not?

b. How will answering these questions address the study's goals?

Examining how executive military leaders utilize sensemaking to navigate the external and internal influences to create strategy will highlight where they are potentially constrained in doing so. For example, when a new administration comes into power and wants to implement a policy that may hurt the ability to recruit, what does that do to their decision-making process? To what degree is their experience based, and pragmatic advice taken to shape policy? Attempting to qualify these questions may shed some light on where the breakdown occurs when a strategy or policy is implemented that does not appeal to candidates who are qualified and have the propensity to serve.

c. How are the questions connected to your conceptual framework?

The conceptual framework for the proposed study centers around sensemaking to create strategies that result in recruiting and retaining military personnel. When I first started thinking about why they have failed to do so at times, my primary focus was on that group

of leaders. I had many thoughts and doubts about what degree accountability measures were in place to provide recruiters with all the tools needed to succeed in the mission. As I have looked at data and other research, my thinking has developed to incorporate the idea that those executive leaders may have their hands tied to a degree. By engaging with them to gain their perspective the goal will be to discover common themes that provide insight into how their experiences align with the proper use of sensemaking.

Section 4: Research Relationships

a. What sorts of research relationships do you plan to establish with the participants in your study or setting, or with those controlling access to your setting or data, and why?

I intend to do interviews with executive leaders within military recruiting and retention and establish trust and rapport through a couple of factors. First, I have the benefit of inherent credibility because I served in that special duty. Second, the messaging will make it clear that the questions I ask them are objective. I will intentionally avoid any perception that I have any agenda designed to shape the results of the research.

b. How will you go about this, and how will this be influenced by any existing relationships you have with them?

Some recruiting and retention leaders I interview may be people I am already familiar with, but I will also endeavor to include those who I have no familiarity with. To a degree any existing relationships influence the respondents I believe it will be from a position of trust. Those who know me well know that I am always interested in what serves the mission in the best way possible, first and foremost. Because of the preexisting relationships I have with many senior enlisted leaders I should have a broad pool of leaders to interview. These relationships will also provide access to other leaders I may not be as familiar with.

Section 5: Site and Participation selection

a. What setting(s) will you study, and/or what individuals will you include in your study? (If you haven't made these decisions yet, explain how you expect to make them, along with the criteria you plan to use.)

The method of conducting research with participants will be through face-to-face interviews either in person or via a platform such as TEAMS. I intend to interview senior leaders who are currently serving or recently retired from recruiting and retention.

b. What theoretical and practical considerations have influenced these choices? How are these choices connected to your research questions (if this isn't obvious)?

Theoretically, anyone associated with recruiting and retention is continually strategizing about ways to improve their production. As they gain rank, the responsibility to do so in a more formal way grows proportionally to their positions within the organization. Their perspectives will be based on experience, particularly within the period I am focusing on which is the year 2012 to present.

Section 6: Data Collection

a. How do you plan to collect your data, and what data will you collect?

I will collect thematic data through interviewing recruiting and retention leaders. I will obtain metric data that shows recruiting and retention rates during the period I will focus on. I may attempt to create an anonymous survey aimed at the candidate demographics who are qualified to serve, regardless of whether they have the propensity to do so. This is probably not necessary as much of this type of data is available already through the Defense Manpower Data Center (DMDC) but I am holding it as an option. I may attempt to do the same thing with more rank-and-file members of recruiting and retention. This would be a fantastic way to balance what senior leadership observes in terms of sensemaking versus how those at the tactical level see it.

b. Why have you chosen these methods, rather than other possible alternatives?

These methods work for my research topic because it is going to be qualitative and narrative in its format.

c. How will these data enable you to answer your research questions (if this isn't obvious)?

Obvious to me.

Section 7: Data Analysis

a. What strategies and techniques will you use to make sense of your data?

Build a timeline showing increases or decreases in recruiting and retention over a designated period, to be determined, related to influences from the political, geopolitical, and societal spheres. The intent of this is to use hard data to demonstrate a possible

correlation between different factors in these areas reflecting the success or failure of recruiting and retention.

b. Why have you chosen these? Indicate how you will use these analyses to answer your research questions; don't just give boilerplate descriptions of analysis strategies.

I will use this strategy along with coded themes from interviews and possibly surveys to examine how executive leaders are constrained or limited in their ability to create pragmatic strategy and policy. For example, an anecdotal thing that is put out by some who are either promoting or repeating narratives state things such as allowing transgender people to serve will ruin the military. Or the military has become too woke and it is negatively affecting readiness and diminishing the culture. Or that the US government fights endless wars to serve the military industrial complex that has little or no actual strategic value. Or the military itself has become too politicized at the senior leadership level and are a part of the deep state; they also lose these wars and needlessly cost American lives. Or that the current generation has no resiliency and therefore cannot serve in the military. These are all examples and will be explored further categorically within the context of political, geopolitical, and societal influences.

Section 8: Validity Issues

a. What do you see as the most important potential threats to the validity of your conclusions?

- Because a part of my study will be based on the worldview and lived experience of current and past recruiting and retention leaders an argument might be made that a certain level of bias exists. I must keep in mind that role identity are areas to consider as well. As part of what I am seeking is an understanding of how they see the world. Gaining an understanding of such bias, which can be identified thematically will be important also.
- When examining propensity to serve there are proposed factors that could be biased in their assertions. For example, the idea that Gen Z is soft or weak in a way that previous generations were not is very subjective. A challenge will be to measure those types of ideas in an objective way that provides a practical answer to those types of questions. Figuring out how to support claims that are subjective via careful examination of all competing factors will be very important.

- What is the benefit or negative impact of lowering standards to meet recruiting goals? This is an area that is highly subjective. The military has done this at varying times throughout its history, but it seems there is potential for it becoming a more permanent practice.

b. What will you do to address these?

- One of the main ways I see to address potential validity threats is one of the things I outlined above. Building a longitudinal timeline will help me and those who review my research to visualize patterns tied to political, geopolitical, and societal events. It provides a means to overlay narratives or policy shifts that occurred in conjunction with or because of such events. Using a combination of interviews, surveys, and available metrics on recruiting and retention numbers will help form understanding of such patterns. Using coded themes from the interviews and surveys to triangulate with a visual timeline will help to clarify the associations. It can show the macro level factors that influence the micro level decision making of candidates in the most eligible demographic, which is Gen Z. This adds an element of expanding beyond descriptive analysis and exploring causality due to decisions or events that impact their decision making. Addressing the factors in this manner also aligns with DEL Outcomes 4 and 6 by designing ethical and research-based leadership processes along with communicating knowledge responsibly to create transformation.

c. What limitations on the generalizability of your results do you see?

- This area is pretty easy as the US military is where context specific insights will apply directly. There is no identifiable generalizability with industry or even other nations militaries. The United States is so unique in government structure, culture, political structure that the questions within this study are very focused. There may be limited generalizability with other entities but only in terms of how the constraints in sensemaking exist for reasons unique to other organizations. This is something that needs to be explored further to understand how they relate to other entities.