

ASSESSING BEST PRACTICES OF FACILITATION OF THE FREE EXERCISE OF
RELIGION BY ARMY CHAPLAINS UTILIZING THE SUCCESS CASE METHOD

by

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A Dissertation Submitted to the Faculty
in the Center for Leadership and Organizations
at Anderson University
in Partial Fulfillment of the
Requirements for the Degree

DOCTOR OF PHILOSOPHY

Anderson, SC

2025

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ABSTRACT

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Under the direction of DR. KYLE A. SMALL

This mixed-methods study examined how U.S. Army chaplains experience and facilitate the free exercise of religion. The research explored compelling narratives of best-case facilitation experiences, identified leadership qualities associated with successful religious support, and analyzed similarities and differences between best and worst-case scenarios. Using Brinkerhoff's Success Case Method, the study distributed a quantitative survey to 1,478 active-duty chaplains (achieving a 23% response rate) followed by twelve guided interviews with participants representing diverse ranks and faith traditions. The research revealed six major themes: significant gaps in education for pluralistic ministry, tension between personal religious convictions and professional duties, crucial impact of leadership on religious support culture, importance of proactive support approaches, systemic challenges in standardization and resource allocation, and transformation of understanding through direct experience. Analysis employed multiple theoretical frameworks, including Socio-Technical Systems Theory, Open Systems Theory, and Schein's organizational culture model. Findings indicate that successful religious support requires comprehensive education, psychologically safe environments for dialogue, standardized processes, and intentional leader development. The study demonstrates how chaplains navigate supporting diverse faiths while maintaining

religious integrity, often experiencing significant personal transformation through engagement with service members. The research contributes to understanding how religious professionals balance personal convictions with institutional requirements in pluralistic settings.

Keywords: Army Chaplain Corps, Free Exercise of Religion, Leadership, Military Readiness, Organizational Culture, Systems Theory

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ACKNOWLEDGMENTS

First and foremost, thank you to my dissertation committee for their expert guidance and support throughout the dissertation process. Their continuous engagement, feedback, and guidance were critical to my successful completion of this dissertation.

Second, I want to thank the survey respondents and interview participants. Thank you for sharing your experiences with transparency and detail to help the U.S. Army Chaplain Corps benefit from the best and least successful practices as we seek to serve all assigned personnel faithfully.

Third, and most importantly, thank you to my family for their flexibility and sacrificial support as I undertook this academic journey. Your loving and stalwart support is impressive, and I consider myself immensely blessed by each of you.

CHAPTER ONE

Introduction

Introduction to the Study

Understanding a phenomenological experience, like facilitating the free exercise of religion through organizational culture assessment, is an invitation to “reveal more fully the essences and meanings of human experience.”¹ Exploring the U.S. Army Chaplain Corps’s² experience of the phenomenon of the free exercise of religion provides an opportunity to explore the potential of its organizational culture, realized or aspirational, for comprehensive support of individuals serving their nation under arduous, austere, and demanding conditions. This organizational culture study seeks to understand the organization’s underlying culture or structure by observing decision-making, accountability process implementation, power distribution, and how the organization adapts to the external environment.³ The study is grounded in Fred Emery’s Open

¹ Clark Moustakas, *Phenomenological Research Methods* (Los Angeles: Sage Publications, 1994), 105, Kindle.

² For this paper, the “U.S. Army Chaplain Corps” refers to the active component Army Chaplain Corps, which is comprised of chaplains, religious affairs specialists, civilian directors of religious education, and other civilian employees working in support of the active component religious support mission. For brevity’s sake, future references simply refer to the “Chaplain Corps.”

³ W. Warner Burke, *Organization Change: Theory and Practice*, 6th ed. (Los Angeles: Sage Publishing, 2024), 63, Kindle.

Systems Theory⁴ (OST(E)) and employs Edgar Schein's⁵ definition of organizational culture to set parameters for observation through a mixed-methods approach.⁶ The assessment process likewise assumes a positivistic⁷ view of human nature that seems best suited for identifying core practices and values and ideal conditions for implementing successful organizational change plans. OST(E)'s optimistic view of human nature and motivation⁸ and Kurt Lewin's action research model increase potential learning and change plan success with participants' integration as co-researchers. Schein's model of organizational culture consists of three levels, ranging from external presentation and articulation to intrinsic motivations based upon socially reinforced underlying assumptions,⁹ and provides a firm basis for an increased understanding of the phenomenon of the free exercise of religion. Furthermore, Robert Brinkerhoff's Success Case Method (SCM) provides a parallel framework to Edgar Schein's for capturing a

⁴ Fred Emery, "Characteristics of Socio-Technical Systems (1957)," in *The Social Engagement of Social Science, A Tavistock Anthology, Volume 2*, ed. Trist, Beulah, et al. (Philadelphia: University of Pennsylvania Press, reprint 1993), 157-186. Emery developed Open Systems Theory (OST(E)) as a refinement of Socio-Technical Systems (STS) with increased emphasis on a positive approach to management and human motivation.

⁵ Edgar H. Schein, "Coming to a New Awareness of Organizational Culture," *Sloan Management Review* 25, no. 2 (Winter 1984): 3. Schein defines culture as "the pattern of basic assumptions that a given group has invented, discovered, or developed in learning to cope with its problems of external adaption and internal integration, and that have worked well enough to be considered valid, and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems."

⁶ Edgar H. Schein, "Organizational Culture," *American Psychologist* 45, no. 2 (February 1990): 18.

⁷ Douglas McGregor, "The Human Side of Enterprise," *The Management Review* 46, no. 11 (1957): 23.

⁸ Merrelyn Emery, "The Current Version of Emery's Open Systems Theory," *Systemic Practice and Action Research* 13, no. 5 (October 2000): 629. "The old value systems that sprang from the acceptance of hierarchical domination also began to be rejected."

⁹ Schein, *Organizational Culture and Leadership*, 10.

thick-narrative description of lived experiences (case studies) to analyze and perpetuate compelling¹⁰ best-case exemplars.

Background of the Study

The Chaplain Corps is an organization within the Army tasked with facilitating the free exercise of religion for uniformed service members of the Department of Defense (DOD), their dependents, and authorized civilians.¹¹ To fulfill this task, chaplains “personally meet the religious requirements of persons in the units to which they are assigned, potentially in isolated or combat environments.”¹² They also advise “on religion, morals, ethics, morale, and well-being in the unit.”¹³ However, individual chaplains volunteer from a host of divergent religious organizations to serve in a pluralistic setting under the auspices of the U.S. Government. A recognized religious organization endorses each chaplain to faithfully represent their respective religious organization while simultaneously providing or coordinating support for all assigned, attached, or authorized personnel.¹⁴ This creates potential tensions between agreed-upon support requirements for service members and the conduct expected by the chaplain’s

¹⁰ Robert O. Brinkerhoff, *The Success Case Method: Find Out Quickly What’s Working and What’s Not* (San Francisco: Barrett-Koehler Publishers, INC, 2003), Chapter 7, Kindle.

¹¹ Department of Defense, Department of Defense Instruction (DODI) 1300.17, *Religious Liberty in the Military Services*, (Washington, DC: Department of Defense, 01 September 2020), 4.

¹² Department of Defense, DODI 1304.28, *The Appointment and Service of Chaplains*, (Washington, DC: Department of Defense, 12 May 2021), 5.

¹³ Department of Defense, DODI 1304.28, 5.

¹⁴ Department of the Army, Army Regulation (AR) 165-1, *Army Chaplain Corps Activities* (Washington, DC: Department of the Army, 05 February 2024), 2. “Chaplains cooperate with each other, without compromising their religious tradition or ecclesiastical endorsement requirements, to ensure the most comprehensive religious support opportunities possible within the unique military environment.”

religious endorsing agency.¹⁵ The stories of the Four Chaplains of the *Dorchester*,¹⁶ Chaplain Emil Kapaun,¹⁷ and Chaplain Jonathan Watters,¹⁸ span from World War II to the Vietnam War as prescient reminders of the cost and a call to sacrificial service for the benefit of others. The four chaplains aboard the *Dorchester* each came from different faith traditions (Jewish, Catholic, Methodist, and Reformed) and served and sacrificed for the sake of others as their Army transport sank in the freezing waters of the northern Atlantic Ocean shortly after 0055 on the 4th of February 1943. Survivors recalled the chaplains giving away their coats, gloves, and life vests as the ship sank after being struck by a torpedo from a German U-boat. Several reported seeing the chaplains huddled on the deck, singing and praying as the vessel sank beneath the frigid waves. Chaplains Kapaun (Korean War) and Watters (Vietnam War) likewise demonstrated care for all and sacrificially lost their lives because of enemy hostility. Chaplain Corps personnel learn these stories, participate in annual celebrations of the Four Chaplains, and highlight their service, sacrifice, and inter-faith solidarity. Charlie Law and Erica Harris observed a 91%

¹⁵ Nahshon Perez, "Religious Rights and Involuntary State Institutions in Democratic Countries: On Evenhandedness and Ecumenism in Militaries," *Religions* 10, (2019): www.mdpi.com/journal/religions doi:10.3390/rel10100556.

¹⁶ James H. Clifford, "No Greater Glory: The Four Chaplains and the Sinking of the *USAT Dorchester*," *Army History*, online: <https://armyhistory.org/no-greater-glory-the-four-chaplains-and-the-sinking-of-the-usat-dorchester/>, accessed 19 March 2022.

¹⁷ "The Story of Father Emil J. Kapaun," *Father Kapaun Cause*, online: www.FatherKapaun.org, accessed 19 March 2022.

¹⁸ "Chaplain (MAJ) Charles J. Watters," *Army History*, online: <https://armyhistory.org/chaplain-maj-charles-j-watters/>, accessed 19 March 2022.

increase in religious discrimination claims despite this training between 2000 and 2019.¹⁹ Moreover, recently published articles²⁰ suggest potential incongruence within the Chaplain Corps' organizational culture, leading to inconsistent delivery of expected services or products²¹ to DOD constituents to facilitate the free exercise of religion.

Statement of the Problem

While the Chaplain Corps exists to support the facilitation of the free exercise of religion, two patterns emerge. The Chaplain Corps' organizational culture supports successful examples of Chaplain Corps personnel facilitating the free exercise of religion. These positive experiences serve as exemplars for fellow Chaplain Corps personnel. Conversely, undesired practices within the Chaplain Corps hinder the free exercise of religion. Practices that contradict the articulated and desired organizational culture of the Chaplain Corps hinder individuals' sense of belonging within the Army and, therefore,

¹⁹ Charlie Law, and Erica Harris, "Religious Discrimination and Accommodations in the U.S. Military: Best Practices for Leaders," *North American Psychology* 21, no. 1 (2019): 189.

²⁰ Chaplain (Major) David A. Evans, U.S. Army, "Starting Again: A Call for Chaplains to Reconcile and Properly Support LGBTQI+ Soldiers," *ArmyTimes*, online: <https://www.armytimes.com/opinion/commentary/2021/06/01/starting-again-a-call-for-chaplains-to-reconcile-and-properly-support-lgbtqi-soldiers/>, accessed 03 June 2022; Chris Rodda, "Former Army Chaplain's Ph.D. Dissertation Reveals Southern Baptist Blueprint to Convert the Military," *Military Religious Freedom Foundation*, online: <https://www.militaryreligiousfreedom.org/2022/06/mrff-exposes-recently-retired-army-chaplains-phd-dissertation-revealing-southern-baptist-blueprint-to-convert-the-military/>, accessed 02 January 2024.

²¹ The term "products and services" refers to the host of services and material support provided by Chaplain Corps personnel. This includes counseling, religious education, conducting religious services, providing advisement, teaching ethics and world religions, coordinating facility access, overseeing resource allocation, and access to other religious leaders.

negatively impact the Army's collective identity²² and readiness. Recognizing that open systems require energy to counteract entropy²³ and that compelling narratives serve as inspirational exemplars, the Chaplain Corps needs to record positive contemporary examples and share them with the Chaplain Corps to maximize the likelihood of replicating the aspects that fostered success while providing flexibility for environmental adaptations.

Theory and Action Related to the Problem

This study adopts a perspective of the Chaplain Corps as a Socio-Technical System (STS), focusing less on the mechanical structure (inputs/outputs) of an open system and more so on the agents (people) in a system as culture makers, according to Fred Emery's Open Systems Theory (OST(E)). Then, utilizing Edgar Schein's three-tiered model for analyzing culture, it employs an action research methodology by applying the Success Case Method to solicit and record best and worst-case exemplars for analysis and learning characterized by increased facilitation of the free exercise of religion.

²² Amy Edmondson, "Psychological Safety and Learning Behavior in Work Teams," *Administrative Science Quarterly*, no. 44 (1999), 354. The author posits that team psychological safety creates an environment marked by respect and trust where members are authentically transparent. In an environment where one cannot practice one's religious, spiritual, or philosophical traditions there is guardedness and lack of trust or respect.

²³ John Urry, "The Complexity Turn," *Theory, Culture & Society* 22, no. 5 (2005): 4.

Purpose of the Study

This study explores the lived experiences of Army Chaplains in facilitating or experiencing the facilitation of the free exercise of religion within the Army. The research will follow the Success Case Method to provide insight and understanding of the phenomenon experienced by practitioners across the Chaplain Corps. Additionally, this research will analyze the environmental factors associated with leadership and the particular environment that correlates with success or lack of success while viewing the Chaplain Corps, the Army, and religious organizations as Socio-Technical Systems according to OST(E). The compelling narratives of this experience will serve as exemplars for emulation with a focus on the essence of the practice to increase the likelihood of similar success at other locations.

Research Questions

This study explores narratives of best and worst-case experiences of facilitation of the free exercise of religion in the U.S. Army by Army Chaplains. The primary research question is: What compelling and valid narratives of best-case facilitation of the free exercise of religion exist within the U.S. Army Chaplaincy? The related research questions are: (1) What descriptors of leader qualities, behaviors, and attitudes are provided in the best-case reports of facilitating the free exercise of religion? Furthermore, (2) What are the similarities or differences between the best and worst-case experiences?

Theoretical Framework

Social-Technical Systems Theory

In 1951, Trist and Bamforth analyzed longwall coal mining. Their analysis demonstrated that individuals operating within a given structure, utilizing assigned technologies, will self-organize for increased efficiency and life-work satisfaction, viewing the enterprise as a joint endeavor in what is known as an STS.²⁴ As individuals react to environmental changes, the organization emerges and becomes a continuously learning²⁵ and dynamic instrument of the people in “a system of individual agents who have freedom to act in ways that are not always predictable, and whose actions are interconnected such that one agent’s actions changes the context for the other agents.”²⁶ As the agents work together to solve problems, organizational culture forms and evolves according to its original design and relationship to external threats.

Trist and Bamforth outlined that organizations consist of a technical side (physical aspects and the products or services they provide) and a social side (defined by the individuals acting as agents within a given structure identified within the system). STSs operate within a market or external environment where each STS seeks marketplace relevance, access to resources, and organizational survival. An STS can exist within

²⁴ E. L. Trist and K. W. Bamforth, “Some Social and Psychological Consequences of the Longwall Method of Coal-Getting: An Examination of the Psychological Situation and Defences of a Work Group in Relation to the Social Structure and Technological Content of the Work System,” *Human Relations* 4, no. 3 (1951): 6. <https://doi.org/10.1177/001872675100400101>.

²⁵ Emery, “The Current Version,” 627.

²⁶ Gary M. Grobman, “Complexity Theory: A New Way to Look at Organizational Change,” *Public Administration Quarterly* 29, no. 3/4 (Fall 2005-Winter 2006): 360.

another STS, competing with other STSs, operating cooperatively with other STSs, and influencing and influenced by continuously changing environmental conditions.

Open Systems Theory (Emery)

Building upon STS Theory, Fred Emery²⁷ formulated Open Systems Theory (OST(E)) in 1957 and refined the theory over the next two decades. OST(E) is a theory characterized by a positive view of human nature that opposes a Theory X²⁸ approach to management and human motivation. He postulates that following two eras marked by cooperation (pre-1790) and mutual disruption (1790-Cold War), organizations and people rejected the notion that power should reside with the upper tiers of society.²⁹ Quinn and Cameron echo this shift, noting that organizational development literature focused on profits, competition, economic issues, and problem-solving at the expense of people's satisfaction, sense of belonging, empowerment, contributions, and social coherence.³⁰ Alternatively, OST(E) views organizations as social groupings of individuals responding to changes in the external environment to retain access to resources and remain

²⁷ Fred Emery, "Characteristics of Socio-Technical Systems (1957)," in *The Social Engagement of Social Science, A Tavistock Anthology, Volume 2*, ed. Trist, Beulah, et al. (Philadelphia: University of Pennsylvania Press, reprint 1993), 157-186.

²⁸ Douglas McGregor, "The Human Side of Enterprise," *The Management Review* 46, no. 11 (1957): 23.

²⁹ Merrelyn Emery, "The Current Version of Emery's Open Systems Theory," *Systemic Practice and Action Research* 13, no. 5 (October 2000): 629. "The old value systems that sprang from the acceptance of hierarchical domination also began to be rejected."

³⁰ Robert E. Quinn and Kim S. Cameron, "Positive Organizational Scholarship and Agents of Change," *Research in Organizational Change and Development* 27, (2019): 36.

competitive in the marketplace. Individuals exercise agency through dynamic changes and internal group autonomy.³¹

The Chaplain Corps as an STS

The Chaplain Corps can be viewed as a nested STS within the Army, within the Department of Defense (DOD), and operating in parallel with chaplaincies in other military services, corporate, medical, and confinement facility chaplaincies. Within the Army, the external environment of the Chaplain Corps consists of primary customers, stakeholders, and interested parties. The primary customers are the uniformed service members, their dependents, and authorized civilians (authorized civilians includes Department of the Army (DA) civilians, contractors, and other civilians attached or deployed with the military). These customers create the demand for religious support. Their demographics determine requirements for products and services. Their satisfaction with the services provided determines the relevance of the Chaplain Corps within the Army. The stakeholders and interested parties consist of senior Army and DOD leaders, religious organizations that educate and endorse chaplains, members of the U.S. Congress exercising oversight and responding to constituent concerns, and the American public with whom the Army has a social contract and obligation. For the free exercise of religion, this social contract entails providing for and supporting both the free exercise of religion and an environment without undue government entanglement in or endorsement of religion.

³¹ David F. Elloy and Tom McCombs. "Application of Open Systems Theory in a Manufacturing Plant," *Team Performance Management* 2, no. 3 (1996): 2. <https://doi.org/10.1108/13527599610126238>

Conceptual Framework

Edgar Schein's Organizational Culture Analysis

Edgar Schein uses an OST.³² approach to develop a practical and valuable definition and methodology for exploring organizational culture. He subsequently provides a three-tiered framework with a practical emphasis on action research wherein the researcher seeks collaborative assistance from organizational members to gain increased clarity of understanding and subsequent ideas for implementing change. This leads to a mixed-methods approach to assessment with a stronger emphasis on the qualitative aspects, “It is probably studied best by action-research methods, that is, methods that get ‘insiders’ involved in the research and that work through attempts to ‘intervene’...It is probably best to work with qualitative research approaches that combine fieldwork methods from ethnography with interview and observation methods from clinical and consulting work.”³³ His model’s emphasis on individual agency, an appreciative view of human nature, and the perspective that culture is a social construct devised and continuously revised by groups responding to external adaptation while addressing internal integration lends itself to alignment with the Success Case Method’s mixed-methods approach of studying an organization like the Chaplain Corps.

³² Edgar H. Schein, “Organizational Culture,” *American Psychologist* 45, no. 2 (February 1990): 116. “Every group and organization is an open system that exists in multiple environments.”

³³ Edgar H. Schein, “Organizational Culture,” *American Psychologist* 45, no. 2 (February 1990): 18.

Procedures

The methodological design employs a mixed-methods approach to research the phenomenology of facilitating the free exercise of religion, employing the SCM of surveys and guided interviews capturing thick-description narratives. All 1,478 active component Army Chaplains will receive an email invitation to participate in the research through a 15-question online Likert-scale survey hosted on Qualtrics. The survey will request minimal demographic information and inquire whether respondents are open to participating in a follow-up interview. The data from the survey will be analyzed for response rates and preferable or less preferable responses for grouping into potential interviewees for at least six best-case and six worst-case examples.³⁴ Interviews will be conducted using Microsoft Teams to accommodate for geographic distance and automatic transcription of interviews for coding and analysis. Coding will be conducted using NVivo and Microsoft Excel. A journal of coding processes will be kept, and a peer researcher will be briefed on bias testing and awareness. Care will be exercised in all research and analysis phases to prevent participant reidentification. Chapter three outlines further procedures for ethical concerns, data management, analysis, and reporting.

Significance of the Study

This novel research creates room for dialogue on a critical issue while grounding the conversation in current organizational design and leadership theory and practice. Facilitating the free exercise of religion is a primary responsibility of the Army Chaplain

³⁴ “When surveys are returned, we create a ‘scoring scheme’ to help us sort responses from the very highest to the very lowest so that we can decide who is a ‘success’ and who is not.” Brinkerhoff, *Success*, Chapter 2.

Corps, and compelling and inspirational examples of best-case successes provide concrete examples of contemporary exemplars beneficial for increasing continued success, especially in locations where initiatives seem ineffective.³⁵ No extant peer-reviewed research on applying these theories within the U.S. Army Chaplain Corps exists. There are discussions of leadership issues and challenges within hospital, hospice, corporate,³⁶ and confinement facility chaplaincies.³⁷ A few limited articles on organizational leadership challenges within non-U.S. military chaplaincies³⁸ exist. However, the differences between the U.S. Army Chaplaincy and other countries' military chaplaincies are too significant to draw leadership parallels.

The findings of this study will provide practical insight into current practices, the conditions and resources employed to support the free exercise of religion, and an understanding of the effectiveness of initiatives, policies, and education for reinforcing the desired behaviors associated with the articulated values of the Chaplain Corps. The study will also provide an opportunity to consider the implications of OST(E) through Action Research in a hierarchical setting often perceived as operating according to a

³⁵ Brinkerhoff, *Success*, Chapter 1.

³⁶ Alan Bester, and Julian C. Muller, "Religion, an Obstacle to Workplace Spirituality and Employee Wellness?" *Verbum et Ecclesia* 38, no. 1 (November 2017): online <https://doi.org/10.4102/ve.v38i1.1779>.

³⁷ Maake J. S. Masango, and Maxwell Mikhathini, "Diversity in the Ministry of Chaplaincy in the South African Department of Correctional Services," *HTS Theological Studies* 72, no. 4 (December 2016): online <http://dx.doi.org/10.4102/hts.v72i4.3748>.

³⁸ Nahshon Perez, "Religious Rights and Involuntary State Institutions in Democratic Countries: On Evenhandedness and Ecumenism in Militaries," *Religions* 10, (2019): online <https://doi.org/10.3390/rel10100556>.

Theory X³⁹ model of human behavior and nature. SCM's emphasis on compelling narratives⁴⁰ from co-researchers might open increased dialogue on bottom-up problem-solving within the military and less hierarchical organizations.

Limitations of the Study

The study acknowledges that the Chaplain Corps' espoused value of commitment to facilitating the free exercise of religion might limit participant transparency or objectivity during mixed-methods data collection. To control for this limitation, the qualitative aspect of SCM requires verifiable interviews with the ability to verify the accuracy of an experience.⁴¹

This study is also limited to active component chaplains, thereby overlooking the perspectives and experiences of several groups: the Army Reserve, National Guard, Directors of Religious Education, Religious Affairs Specialists, and commanders. While these perspectives are critical and valid, the study restricted the pool to a reasonable yet broad enough population to support generalizability while not creating a population too

³⁹ Leanna Lawter, Richard E. Kopelman, and David J. Prottas, "McGregor's Theory X/Y and Job Performance: A Multilevel, Multi-source Analysis," *Journal of Managerial Issues* 4, no. 1, (2015): 86. The researchers hypothesize that managers leading according to Theory X's negative view of human behavior and motivation find themselves in a self-fulfilling prophecy of sorts as worker's motivation and drive drops due to a lack of compelling leadership and opportunity to exercise initiative and autonomy for the good of the organization.

⁴⁰ Brinkerhoff, *Success*, Chapter 1. "The SCM deals with the suspicion that stories can generate in two key ways. First, we don't use the SCM to find and tell just any old story. We seek out and document the best, and the worst, that a new change or innovation is producing, and carefully capture the essence of these positive and negative experiences in carefully documented stories. The second way that the SCM produces credibility and persuasiveness is with truthfulness. SCM stories are not hearsay evidence or opinion ... they must be confirmable experiences that can be backed up with corroboration and evidence. A story that cannot be confirmed is not a success story."

⁴¹ Brinkerhoff, *Success*, Chapter 1.

large to query and interview in a reasonable timeframe.⁴² Future research might consider these perspectives and their unique environmental or organizational considerations.

Assumptions

This study assumes the approach sufficiently accounts for biases to provide an objective and clear understanding of the participant's experience and perspective. The inquiry relies upon Husserl's concept of "bracketed judgment,"⁴³ journaling of coding processes, and peer accountability to assess objectivity. The study also assumes a positive view of human nature and motivation, whereby the organization and its members desire positive exemplars to follow and improve their facilitation of the free exercise of religion. This positive view of human nature follows a shift noted by Robert Quinn and Kim Cameron when they observed that organizational development literature shifted its focus from profits, competition, economic issues, and problem-solving to people's satisfaction, sense of belonging, empowerment, contributions, and social coherence.⁴⁴ This leads to the last assumption: chaplains, the group responsible for exercising leadership within the Chaplain Corps, are best positioned within the Army to implement action plans predicated upon SCM to increase positive experiences of the free exercise of religion.

⁴² John W. Creswell, and J. David Creswell, *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches* (San Francisco: Sage Publications, Inc., 2020), 254-256, Kindle.

⁴³ Earl Husserl, *Ideas: General Introduction to Pure Phenomenology* (New York: Routledge, 2002), 58, Kindle.

⁴⁴ Robert E. Quinn and Kim S. Cameron, "Positive Organizational Scholarship and Agents of Change," *Research in Organizational Change and Development* 27, (2019): 36.

Definitions of Terms

Commander

A commander has official command authority as outlined in Title 10 of the U.S. Code and Army Regulation (AR) 600-20, *Army Command Policy*.⁴⁵ This title applies to commanders at all echelons within the Army. The average soldier's interaction with the chain of command begins at the company level and proceeds to the Army Command or Geographic Combatant Command to which they are assigned.

Endorsing Agency/Agent

The religious-endorsing organization or the representative responsible for speaking on behalf of the organization, providing ongoing education and training for endorsed military chaplains, and abiding by the requirements outlined in Department of Defense Instruction (DODI) 1304.28, *The Appointment and Service of Chaplains*,⁴⁶ e.g., the Military Archdiocese or Archbishop Timothy Broglio are the endorsing agency and agent for all Roman Catholic priests serving as military chaplains.⁴⁷

Evangelism

Evangelism refers to the act or process of converting someone to a religious perspective from another or no religious perspective.

⁴⁵ U.S. Army, Army Regulation 600-20, *Army Command Policy*, (Washington, DC: Department of the Army, 24 July 2020).

⁴⁶ Department of Defense, DODI 1304.28, *The Appointment and Service of Chaplains*, (Washington, DC: Department of Defense, 12 May 2021), 5.

⁴⁷ "Where Catholic Faith and Duty Unite: Serving Those Who Serve," Archdiocese for the Military Services (USA), accessed 24 April 2024, <https://www.milarch.org/>.

Facilitation

Facilitation refers to the Chaplain Corps' performing direct religious support for individuals or providing access to appropriate religious support, including "worship, religious rites, sacraments and ordinances, holy days and observances, pastoral care and counseling, and religious education."⁴⁸ Individuals perform religious support if it aligns with their religious tradition and practices or provide religious support through referrals or coordinating access to facilities and material resources. The referrals might be to other Army Chaplains, local civilian religious organizations, or a certified contractor or volunteer providing support on the military installation. This practice is often referred to as "provide or perform."

Free Exercise of Religion

For this paper, Free Exercise of Religion refers to the accommodations afforded by the DOD to service members to exercise their respective "sincerely held beliefs (conscience, moral principles, or religious beliefs)"⁴⁹ while serving within the military under a myriad of conditions where military necessity restricts access to normatively accessible communities and resources. To that end, the guidelines for removing the burden and accommodation are outlined in DODI 1300.17 and the Religious Freedom Restoration Act.⁵⁰ A critical aspect of this approach to facilitating the free exercise of

⁴⁸ Department of the Army, Army Regulation (AR) 165-1, *Army Chaplain Corps Activities* (Washington, DC: Department of the Army, 05 February 2024), 12.

⁴⁹ Department of Defense, DODI 1304.28, 4.

⁵⁰ Religious Freedom Restoration Act of 1993, Public Law 103-141, US Statutes at Large 107 (1993): 2000bb-2000bb-4, codified at US Code 42 (1993), §§ 2000bb.

religion is the requirement for support barring a compelling government interest, which must follow the least restrictive means.

Missionary

For this paper, a person is sent into a group of people to convert people to a specific religious perspective. This paper is not concerned with the setting or approach of missionary activity. The study uses this term to understand why an individual was endorsed to serve as a military chaplain by their respective endorsing agency/agent.

Proselytizing

Using coercive techniques, power differential(s), or creating a hostile environment to convert a person to a religious perspective. While the desired end of proselytization matches evangelism, the methodology is substantially different.

Summary and Forecast of Chapter Two

Facilitating the free exercise of religion is essential to the U.S. Army Chaplain Corps in fulfilling its mandated mission to support the spiritual needs of uniformed service members, their dependents, and authorized civilian personnel. As with any organization, organizational leadership must analyze the organizational culture to identify incongruence. The Chaplain Corps perpetuates historical examples of facilitation of the free exercise of religion, whereas OST(E) demonstrates the necessity of ongoing assessment to ensure successful external adaptation to a changing environment and internal integration to ensure organizational relevance and effectiveness in producing the desired product(s) in alignment with the organization's espoused values. Where Edgar Schein's model provides a process for analyzing and assessing organizational culture, Robert Brinkerhoff's Success Case Method provides a framework for curious

engagement through Action Research focused on understanding current examples of best and worst-case examples that serve as exemplars for renewed success and clarification of organizational goals and learning. This study possesses the potential to avoid entropy-inducing stagnation in a rapidly changing environment while empowering individuals within the organization to facilitate the free exercise of religion proactively through compelling and inspirational narratives that convey the essence of the experience in a manner that supports flexible adaptation to particularized environments.

CHAPTER TWO

Literature Review

Introduction

This study explores compelling and valid narratives of best-case experiences of facilitation of the free exercise of religion in the U.S. Army by Army Chaplains. The primary research question is: What compelling and valid narratives of best-case facilitation of the free exercise of religion exist within the U.S. Army Chaplaincy? The related research questions are: (1) What descriptors of leader qualities, behaviors, and attitudes are provided in the best-case reports of facilitating the free exercise of religion? Furthermore, (2) What are the similarities or differences between the best-case experiences?

This chapter provides an overview of the Chaplain Corps' role and mission for organizational familiarity and understanding. The chapter then reviews literature related to socio-technical and open systems theory, organizational culture assessment, and action research. An organizational analysis facilitates the triangulation of theory within the organization. A brief discussion of gaps in the literature and potential contributions to organizational design literature follows this. The chapter concludes with a forecast of a mixed-methods approach to assessing the best and worst-case experiences of facilitating the free exercise of religion in the U.S. Army.

Background

The Chaplain Corps provides religious support and advisement on religion, ethics, morale, and morals¹ for the 473,000 active component² Army personnel, their dependents, and authorized civilian personnel. The Chaplain Corps supports this mission through integrated assignments of approximately 1,400 chaplains and 1,300 religious affairs specialists across the Army enterprise. To ensure professional standards of competence, the Department of Defense requires each potential chaplain to possess an undergraduate-level bachelor's degree with at least 120 hours and "a post-baccalaureate graduate degree in the field of theological or related studies from a qualifying education institution."³

Members of the Chaplains Corps report directly to their assigned command for all unit-related matters. Chaplain Corps members also receive technical supervision from the Office of the Chief of Chaplains to their echelon within the Army structure.⁴ As credentialed religious professionals, they also maintain an active relationship with their endorsing religious organizations.⁵ An analogous organizational structure exists for lawyers serving alongside the chaplains. Lawyers work for their assigned organization

¹ US Department of the Army, *Army Regulation (AR) 165-1: Army Chaplain Corps Activities*, Army Regulation (Washington, DC: Department of the Army, 2024), 14.

² Congressional Research Service, *FY2023 NDAA: Active Component End-Strength*, Lawrence Kapp, 117th Cong., 2nd sess. (Washington, DC, August 23, 2022) <https://crsreports.congress.gov/product/pdf/IN/IN11994>, 4.

³ U.S. Department of Defense, *Department of Defense Instruction (DODI) 1304.28: The Appointment and Service of Chaplains*, (Washington, DC: Department of Defense, 12 May 2021), 7.

⁴ Army, *AR 165-1*, 13.

⁵ Department of Defense, *DODI 1304.28*, 12.

(sub-unit) within the Army, receive technical guidance from their branch, and maintain credentials through professional organizations like state bar associations. From an organizational design perspective, this multi-layered membership functions as a loosely-coupled system with organizational (sub-unit) commanders⁶ exercising legal and positional authority over their organizations and staff.

Chaplains work collaboratively to provide religious education and worship services under the guidance and direction of the senior or garrison chaplain at each military installation. To accomplish this task, garrison chaplains assign chaplains to work together at chapel services while considering theological compatibility, diversity of support required by the represented population, and requirements for external support from contracted local civilian religious leaders or credentialed volunteers operating under the sponsorship of a chaplain.⁷

Theoretical Framework

Socio-Technical and Open Systems Theory

Open Systems Theory

Open System Theory borrows from Ludwig von Bertalanffy's General Systems Theory, which is grounded in cellular biology and is used to understand organizational

⁶ US Department of the Army, *Army Regulation (AR) 600-20: Army Command Policy*, Army Regulation (Washington, DC: Department of the Army, 24 July 2020), 2. "Command is exercised by virtue of office and the special assignment of members of the Armed Forces of the United States holding military grade who are eligible to exercise command...The commander is responsible for all aspects of unit readiness."

⁷ Army, *AR 165-1*, 15 and 20. Page 15 discusses the assignment of chaplains on an installation and page 20 discusses contracted religious leaders and volunteer distinctive religious group leaders.

design, growth, and adaptation.⁸ Like cellular organisms, organizations acquire resources from their surrounding environment, perform activities with the resources, and produce a product or service; “Organizations engage in exchanges and transactions with other groups or organizations. The exchanges may involve monetary or physical resources, information, or social legitimacy. Because organizations are not self-contained or self-sufficient, the environment must be relied upon to provide support.”⁹ These products must either positively impact the environment or produce minimal negative feedback to the organism or its environment for its survival and ability to adapt.¹⁰ Applied to organizations, the organization’s output is products or services provided to the environment. The organization adapts to external stimuli for resources and modifies the acquisition of resources and internal processes to meet perceived environmental demands.¹¹

The activities of organizations can be cooperative or competitive. Cooperative activities might refer to sequential production with adjacent organizations providing services or products that neither could produce in isolation, e.g., an engine production plant and transmission plant supporting an automobile assembly plant. Competition among organizations likewise creates demands for resources, while competitor

⁸ Ludwig von Bertalanffy, “An Outline of General System Theory,” *The British Journal for the Philosophy of Science* 1, no.2 (August 1950): 155-157.

⁹ Jeffery Pfeffer and Gerald R. Salancik, *The External Control of Organizations: A Resource Dependent Perspective* (Stanford: Stanford University Press, 2003), Kindle, 43.

¹⁰ Ronald M. Atlas and Richard Bartha, *Microbial Ecology: Fundamentals and Applications*, 4th Ed. (New York: Benjamin-Cummings Publishing, 1998), 63.

¹¹ Mary Jo Hatch, *Organization Theory: Modern, Symbolic, and Postmodern Perspectives* (Oxford: Oxford University Press, 2018), 132-133.

production potentially hinders adjacent organizational activity through market saturation or the production of a higher-quality or cheaper product or service. Negative feedback may limit growth and organizational survival if a market becomes too densely populated. A biological parallel occurs when the “accumulation of lactic acid and other fatty acids can halt the activity of *Lactobacillus*; and the accumulation of ethanol stops further fermentation by *Saccharomyces*.”¹² In both instances, the organism’s activity creates toxic substances that prevent it from acquiring more resources or actively threaten its continued activity until the environment changes. The organization’s interaction with the environment for survival gave rise to the Open Systems Theory principle of interdependence: “Interdependence is a consequence of the open-systems nature of organizations—the fact that organizations must transact with elements of the environment in order to obtain the resources necessary for survival.”¹³

Organizations seek stability within this environment through external adaptation and internal integration, achieving relative homeostasis. This “occurs when several interacting populations cooperate to best exploit the available resources.”¹⁴ Unlike cellular organisms that lack cognitive intentionality, Jeffery Pfeffer and Gerald Salancik

¹² Ronald M. Atlas and Richard Bartha, *Microbial Ecology: Fundamentals and Applications*, 4th Ed. (New York: Benjamin-Cummings Publishing), 1998, 63.

¹³ Jeffery Pfeffer and Gerald R. Salancik, *The External Control of Organizations: A Resource Dependent Perspective* (Stanford: Stanford University Press, 2003), Kindle, 42.

¹⁴ Ronald M. Atlas and Richard Bartha, *Microbial Ecology: Fundamentals and Applications*, 4th Ed. (New York: Benjamin-Cummings Publishing, 1998, 186.

argue that organizations require leaders and managers who focus on “internal activities, organizational adjustments, and the behavior of individuals.”¹⁵

Socio-Technical Systems Theory

Socio-technical systems theory grounds organizations within an Open Systems Theory framework. It relies heavily upon the principle of interdependency and emphasizes the social side of organizations, correcting Frederick Winslow Taylor’s unilateral scientific management approach that characterized the first several decades of the twentieth century.¹⁶ Thus, STS views the technical and social systems as interdependent and open; “The systems involved must remain open to and interact constructively with their environments.”¹⁷

In 1951, as technological changes in coal mining were introduced, a mining company experienced decreased productivity and increased absenteeism; “As productivity declined and absenteeism increased, management controls were tightened, and additional pressure was exerted on employees to produce. This increased pressure often translated into greater stress for employees and further injuries.”¹⁸ Management

¹⁵ Jeffery Pfeffer and Gerald R. Salancik, *The External Control of Organizations: A Resource Dependent Perspective* (Stanford: Stanford University Press, 2003), Kindle, 6.

¹⁶ Mary Jo Hatch, *Organization Theory: Modern, Symbolic, and Postmodern Perspectives* (Oxford: Oxford University Press, 2018), 30-32.

¹⁷ William H. Fox, “Sociotechnical System Principles and Guidelines: Past and Present,” *The Journal of Applied Behavioral Science* 31, no. 1 (1995): 92.

¹⁸ William Passmore and Frank Friedlander, “An Action-Research Program for Increasing Employee Involvement in Problem Solving,” *Administrative Science Quarterly* 27, no. 3 (September 1982): 351. <https://www.jstor.org/stable/2392316>.

and owners of the coal mines sought to understand why higher wages and amenities were ineffective at retaining employees or increasing productivity.¹⁹

Ken Bamforth, a former coalminer, invited his colleague, Eric Trist, from the Tavistock Institute, to interview miners at a coal mine using new longwall technology following a pre-long wall semiautonomous approach where coal production outpaced projected goals while locations using the new technology and approach lagged far behind projected goals. Bamforth's prior membership within the mine and his introduction of Trist enabled workers to have unfettered access to understand the challenges and opportunities from a sociological perspective, focusing on the employees rather than the new technology. They found that:

Sometimes the increase reported has reached a level definitely above the upper limit customarily achieved by good workmen using similar equipment under conventional conditions. They have been accompanied by impressive changes in the social quality of the work-life of face teams. Greater cohesiveness has appeared in groups, and greater personal satisfaction has been reported by individuals. Decreases have also been indicated in sickness and absenteeism.²⁰

Semiautonomous work arrangements within the team were critical catalysts of success at higher productivity locations. For example, in Durham,

groups of 40-50 men interchanged the various jobs required while alternating shifts in ways they felt best and evolving an innovative pay system that seemed equitable to them. Output was 25 percent higher with lower costs than on a comparison face similar in every respect (conditions, equipment, personnel)

¹⁹ E. L. Trist and K. W. Bamforth, "Some Social and Psychological Consequences of the Longwall Method of Coal-Getting: An Examination of the Psychological Situation and Defences of a Work Group in Relation to the Social Structure and Technological Content of the Work System," *Human Relations* 4, no. 3 (1951): 5. <https://doi.org/10.1177/001872675100400101>.

²⁰ E. L. Trist and K. W. Bamforth, "Some Social and Psychological Consequences of the Longwall Method of Coal-Getting: An Examination of the Psychological Situation and Defences of a Work Group in Relation to the Social Structure and Technological Content of the Work System," *Human Relations* 4, no. 3 (1951): 3-4. <https://doi.org/10.1177/001872675100400101>.

except that of work organization. Accidents, sickness, and absenteeism were cut in half.²¹

Trist and Bamforth discovered that workers forced to follow the longwall method without variation, who previously “had craft pride and artisan independence,”²² felt isolated and developed four types of group defense following the technological breakdown of prior social groups: informal organization, reactive individualism, mutual scapegoating, and self-compensatory absenteeism—each of these negatively impacted production, safety, and worker satisfaction.²³ Trist and Bamforth posit that the negative results are the correlative effects of interdependencies of the social and technical systems:

The technical and social systems are interdependent of each other in the sense that the former follows the laws of the natural sciences while the latter follows the laws of the human sciences and is a purposeful system. Yet they are correlative in that one requires the other for the transformation of an input into an output, which comprises the functional task of a work system.²⁴

This theoretical discovery was one of the earliest to tether the science of natural law to the human and social sciences.

In 1957, Fred Emery continued to explore interdependencies within STSs. He focused on the tensions between the social and environmental aspects of work and the use of technology. This highlighted a growing emphasis on humanity working within complex systems; “a social scientist’s description of the technological system intimately

²¹ Eric L. Trist, “The Evolution of Socio-Technical Systems: A Conceptual Framework and an Action Research Program (Paper presented at the Conference on Organizational Design and Performance, Ontario, Canada, June 1981): 161.

²² Trist and Bamforth, “Longwall Method,” *Human Relations* 4, no. 3 (1951): 6.

²³ Trist and Bamforth, “Longwall Method,” *Human Relations* 4, no. 3 (1951): 30-33.

²⁴ Eric L. Trist, “The Evolution of Socio-Technical Systems: A Conceptual Framework and an Action Research Program (Paper presented at the Conference on Organizational Design and Performance, Ontario, Canada, June 1981): 24.

portrays its demands on the social system, whereas an engineer describes what the machines, apparatus, and materials require of each other for efficient, coordinated operation.”²⁵ As the STS seeks relative homeostatic stability,²⁶ the technological system mediates with the external environment, creating interdependencies between the technical and social systems.²⁷ He further delineates dependent tasks within systems into two types:

Simultaneous interdependence is characteristic of a task too large for an individual to perform in the required time and hence broken into individual part-tasks. *Successional interdependence* is the most widespread form of task interdependence. It occurs in two main forms: the task may be such that, as in longwall coal-mining, only one set of operations can be carried out on each shift; or successive operations can be performed simultaneously, as on an assembly line.²⁸

The interdependency of the two systems within STS leads to the functional goal of what Albert Chermis defines as *co-optimization*, whereby both systems are optimized simultaneously with recognition of their interdependent feedback on one another:

Organizational goals are best met not by the optimization of the technical system and the adaptation of the social system to it, but by the joint optimization of the technical and the social aspects, this exploiting the adaptability and

²⁵ Fred Emery, “Characteristics of Socio-Technical Systems (1957),” in *The Social Engagement of Social Science, A Tavistock Anthology, Volume 2*, ed. Trist, Beulah, et al. (Philadelphia: University of Pennsylvania Press, reprint 1993): 161.

²⁶ Fred Emery, “Characteristics of Socio-Technical Systems (1957),” in *The Social Engagement of Social Science, A Tavistock Anthology, Volume 2*, ed. Trist, Beulah, et al. (Philadelphia: University of Pennsylvania Press, reprint 1993): 157. “The ‘open systems’ concept logically implies systems that spontaneously reorganize toward states of greater heterogeneity and complexity and achieve a ‘steady state’ at a level where they can still do work.”

²⁷ Fred Emery, “Characteristics of Socio-Technical Systems (1957),” in *The Social Engagement of Social Science, A Tavistock Anthology, Volume 2*, ed. Trist, Beulah, et al. (Philadelphia: University of Pennsylvania Press, reprint 1993): 158.

²⁸ Fred Emery, “Characteristics of Socio-Technical Systems (1957),” in *The Social Engagement of Social Science, A Tavistock Anthology, Volume 2*, ed. Trist, Beulah, et al. (Philadelphia: University of Pennsylvania Press, reprint 1993): 169.

innovativeness of people in attaining goals instead of overdetermining technically the manner in which these goals should be attained.”²⁹

Co-optimization follows nine principles: compatibility, minimal critical specification, sociotechnical criterion, multifunctional principle, boundary location, information flow, support congruence, design and human values, and incompleteness (table 2.1).

²⁹ Albert B. Cherns, “Principles of Socio-Technical Design,” *Human Relations* 29, (1976): 784.

Table 2.1. Principles of Socio-Technical Design³⁰

Principles	Description
Compatibility	The design supports the accomplishment of a defined goal/task.
Minimum Critical Specification	Two aspects: (positive) State what is essential. (negative) Do not state more than what is essential.
Sociotechnical Criterion	Variances are unprogrammed events. Key variances impact outcomes. Variances are addressed as close to the point or origin as possible.
Multifunctional Principle	Redundant training and function overlap creates efficiencies with multiple routes to the same goal.
Boundary Location	Group people and tasks according to technology, time, or location and empower dotted-line relationships for efficiency and focus.
Information Flow	Systems need to support information at the point of action.
Support Congruence	Systems should reinforce desired behaviors, and management's actions should align with the articulated philosophy.
Design and Human Values	Support and facilitate work and activities that create individual and corporate satisfaction, pride, and growth.
Incompletion	Recognize that design is an iterative process.

Trist, Bamforth, and Emery's work revealed the rising prominence of the social aspect of organizations, contradicting Taylor's scientific approach, which emphasizes technology and task-related processes. As the post-World War II economic boon witnessed the emergence of the middle class, an emphasis on worker satisfaction, and employee empowerment, self-management experienced increased prominence.

³⁰ Adapted from Albert B. Cherns, "Principles of Socio-Technical Design," *Human Relations* 29, (1976): 785-792.

Critiques and Limitations for Open and Socio-Technical System Theory

Markus Baer and Michael Frese caution that STSs exercising innovation might overlook the human side of the STS, leading to failed innovations due to a lack of psychological safety. STSs need processes to moderate psychological safety in innovation and goal achievement.³¹ For this reason, Alarifi and Adam argue for increased participatory leadership due to the “importance of the social dimension and the mutual relations between leaders and their subordinates in case the enterprise is exposed to a crisis imposed by the external environment.”³² Drawing from social exchange theory, Alarifi and Adam likewise state “that when leaders focus on subordinates’ benefits rather than placing additional burdens on them, they trade that benefit for high performance.”³³

Amy Edmondson places the onus for creating a psychologically safe STS on leaders: “If the leader is supportive, coaching-oriented, and has non-defensive responses to questions and challenges, members are likely to conclude that the team constitutes a safe environment.”³⁴ Daly and Saetre echo Edmondson’s emphasis on psychological safety in innovation offering, “Drawing from both politeness theory and organizational support theory, we hypothesized that exposure to a face-threatening message about

³¹ Markus Baer and Michael Frese, “Innovation is Not Enough: Climates for Initiative and Psychological Safety, Process Innovations, and Firm Performance,” *Journal of Organizational Behavior* 24, (2003): 44-46. <https://doi.org/10.1002/job.179>

³² Ghadah Alarifi and Nawal Abdullah Adam, “The Role of Participatory Leadership and Employee Innovative Behavior on SME’s Endurance,” *Sustainability* 15, (2023): 2. <https://doi.org/10.3390/su15032740>.

³³ Alarifi and Adam, “Participatory Leadership,” 3.

³⁴ Amy Edmondson, “Psychological Safety and Learning Behavior in Work Teams,” *Administrative Science Quarterly* 44, (1999): 356.

project termination would negatively affect feelings of psychological safety and affect as well as decrease the willingness of people to engage in further innovation.”³⁵ They are not arguing for the lack of project termination; they only argue that leaders should consider the messaging method and focus on explaining why. Facilitating and sustaining psychological safety in an STS recognizes the necessity of individual commitment, innovation, contributions for the team’s sake, and initiative to raise concerns and insights before an issue arises. Edmondson, Bohmer, and Pisano observed that “when they lacked psychological safety, lower-status team members were unwilling to risk censure by experienced surgeons who might view their comment as useless or disruptive.”³⁶

Psychological safety is not limited to belonging and acceptance. Sinclair cautions that integrated teams with strong cohesion might require uniformity at the expense of ethical conduct and its ability to remain externally focused on environmental changes or opportunities. A team that is open to dissenting viewpoints, dialogical tension over issues, and critical thinking from diverse perspectives is better postured to remain viable as an open system.³⁷

Calvin Prava notes that some argue that STS is not applicable in nonlinear organizations, especially in professions characterized by extensively educated members.

³⁵ John A. Daly. and Alf Steiner Saetre, “The Consequences of Face-threatening Feedback on Innovators’ Psychological Safety, affect, and Willingness to Engage in Future Innovation Projects,” *Frontiers in Psychology* 14, (2023): 7. <https://doi.org/10.3389/fpsyg.2023.1060617>

³⁶ Amy C. Edmondson, Richard M. Bohmer, and Gary P. Pisano. “Disrupted Routines: Team Learning and New Technology Implementation in Hospitals,” *Administrative Science Quarterly* 46, no. 4 (December 2001): 708.

³⁷ Amanda Sinclair, “Approaches to Organisational Culture and Ethics,” *Journal of Business Ethics* 12, (1993): 67-69.

In these particular fields, there is the potential that “their expectations about work activities, career advancement, and reward emphasize individual contributions. This highly individualistic orientation is not consistent with the work group approach that now tends to dominate STS design.”³⁸ To this argument, he counters that an appropriate focus on the fundamental STS design principles facilitates the appropriation of STS to nonlinear organizations:

Modifying the practices employed in STS design to include nonlinear work systems is consistent with the essential precepts of STS design: open systems analysis, a best match of social and technical subsystems, redundant function over redundant parts, systemic interrelationships between design factors, self-design, and minimum critical specifications.³⁹

This approach facilitates the appropriation of STS principles to the Chaplain Corps, which operates as an open system providing services to the Army and the Joint Force.

Organizational Culture Assessment

A plethora of organizational culture definitions and assessments exist. Each definition rests upon assumptions regarding organizations, human nature, and sociological or anthropological concepts. Organizational research relies on specific definitions, and scholars continually navigate which definitions are operable for ongoing inquiry. What follows is a brief literature review of definitions and assessment tools/methods to demonstrate the alignment of Schein’s definition and assessment

³⁸ Calvin Pava, “Redesigning Sociotechnical Systems Design: Concepts and Methods for the 1990s,” in *The Journal of Applied Behavioral Science* 22, no. 3 (1986): 205.

³⁹ Calvin Pava, “Redesigning Sociotechnical Systems Design: Concepts and Methods for the 1990s,” in *The Journal of Applied Behavioral Science* 22, no. 3 (1986): 211

methodology with an appreciative perspective of humanity and the Chaplain Corps as an STS operating within the STS of the Army.

Defining Organizational Culture

Definitions for organizational culture occupy at least three academic fields: anthropology, sociology (mores), and philosophy (ideas).⁴⁰ Anthropological (sociocultural) approaches view organizational culture as enmeshed within the organization, both evolving from the organization and defining the organization; organizations *are* cultures.⁴¹ Sociological and philosophical (ideational) approaches conversely argue that social groups develop agreed-upon norms, mores, and customs that become a culture applied to the group and new members; “organizations *have* cultures.”⁴² Both approaches possess benefits and cautions regarding utilization for cultural assessment and change.

Allaire and Firsirotu caution against a philosophical perspective. When culture is understood as a system of ideas (Goodenough’s Cognitivism, Levi Strauss’s Structuralism, Wallace’s Mutual-equivalence, and Geertz and Schneider’s Symbolism), “culture is considered as a separate, conceptual realm that may develop in ways that are

⁴⁰ Yvan Allaire and Mihaela E. Firsirotu, “Theories of an Organizational Culture.” *Organization Studies* 5, no. 3 (1984): 196.

⁴¹ Kim S. Cameron, and Robert E. Quinn, *Diagnosing and Changing Organizational Culture Based on the Competing Values Framework*, 3rd ed. (San Francisco: John Wiley and Sons, 2011), Kindle, 36.

⁴² Cameron and Quinn, *Diagnosing and Changing Organizational Culture*, 36.

not consonant with a social system's structures and formal processes.”⁴³ Conversely, they observe that under a sociostructural approach, e.g., Malinowski's Functionalism, Radcliffe-Brown's Functionalist-structuralist, Historical-diffusionist of Boas, Benedict, Kluckhohn, and Kroeber, and the Ecological-adaptationism of White, Service, Rappoport, Vayda, and Harris, literature demonstrated enmeshment of the cognitive or ideational aspects of a culture leaving “little attention paid to the possible dissonance or incongruency between the cultural and sociocultural aspects of organizations or to the study of their distinct, ideational, realm.”⁴⁴ V. Lynn Meek voices concerns over approaches to cultural studies, asking how culture is appropriated to organizational analysis and whether researchers are glossing over people by misusing terminology, theories, and concepts apart from their accepted usage in anthropology and sociology.⁴⁵ Cultural studies, especially those related to organizations, need more precise definitions, including more open acknowledgment of the limits of these definitions.

In 1998, Verbeke, Volgering, and Hessels researched the bounds of conceptual expansion within fields using organizational culture and climate as their topics. A search of the Social Sciences Citation Index (SSCI) for 1960-1993 provided 54 definitions of organizational culture.⁴⁶ The researchers analyzed and grouped the 54 definitions

⁴³ Yvan Allaire and Mihaela E. Firsirotu, “Theories of an Organizational Culture,” *Organization Studies* 5, no. 3 (1984): 203.

⁴⁴ Allaire, “Theories of an Org. Culture,” 199.

⁴⁵ Lynn V. Meek, “Organizational Culture: Origins and Weaknesses,” *Organization Studies* 9, no. 4, (1988): 454.

⁴⁶ Willem Verbeke, Marco Volgering, and Marco Hessels, “Exploring the Conceptual Expansion Within the Field of Organizational Behaviour: Organizational Climate and Organizational Culture,” *Journal of Management Studies* 35, no. 3. (1998): 310.

according to three perspectives from cultural anthropology, identifying four clusters: cognitive, variable, holistic, and a variable-cognitive hybrid.⁴⁷ Along a similar trajectory that minimizes intentional cognition, Hofstede highlights the lack of consensus, preferring to study the characteristics of organizational culture;

There is no consensus about its definition, but most authors will probably agree on the following characteristics of the organizational/corporate culture construct: it is (1) holistic, (2) historically determined, (3) related to anthropological concepts, (4) socially constructed, (5) soft, and (6) difficult to change.⁴⁸

Hofstede addresses these six clusters with the following definition, “Culture consists of the unwritten rules of the social game. It is the collective programming of the mind that distinguishes the members of one group or category of people from others.”⁴⁹

The growing emphasis on sociological understanding of organizational culture, with its emphasis on values, beliefs, and norms, led Ouchi and Williams to assert,

The study of organizational culture is rooted more deeply in sociology than in any other intellectual tradition. Critical to both sociology and to the study of organizational culture is the idea of an organization as a social phenomenon that has its own features which distinguish it from an environment on the one hand and from the individual desires and predistortions of its members on the other.⁵⁰

DeBode, more recently, points to organizational culture as a social construct, stating that “organizational culture is created by the interactions among organizational

⁴⁷ Verbeke, “Exploring the Conceptual Expansion,” 316-317.

⁴⁸ Geert Hofstede, Bram Neuijen, Denise Daval Ohayv, and Geert Sanders, “Measuring Organizational Cultures: A Qualitative and Quantitative Study Across Twenty Cases,” *Administrative Science Quarterly* 35, (1990): 35.

⁴⁹ Geert Hofstede, Gert Jan Hofstede, and Michael Minkov, *Cultures and Organizations: Software of the Mind*, 3rd ed. (New York: McGraw Hill, 2010), Kindle, 6.

⁵⁰ William G. Ouchi and Alan L. Wilkins. “Organizational Culture,” *Annual Review of Sociology* 11, (1985): 469.

members, leaders, behaviors and norms, and consequently, influences individuals' behavior in an organization."⁵¹ The human-centered approach to understanding organizational culture leverages McGregor's (Theory Y) and Emery and Trist's (STS) theories to develop social and action-oriented definitions for culture. Edgar Schein has extended this movement, and following an open systems theory⁵² emphasis on the complexity of organizational culture, Schein defines culture as:

The pattern of basic assumptions that a given group has invented, discovered, or developed in learning to cope with its problems of external adaption and internal integration, and that have worked well enough to be considered valid, and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems.⁵³

Schein's definition of organizational culture has gained significant traction in organizational design. Bellott affirms, "Most recent research on culture either references Schein's (1987) definition or builds upon his work."⁵⁴ This widespread adoption of Schein's definition underscores its practical relevance and acceptance in the field, making it a crucial concept for researchers and professionals to understand. Hogan and Coote's quantitative study exemplifies the practical application of Schein's model in understanding organizational culture. They utilize Schein's model to assess organizational culture and its role in fostering innovation, demonstrating that "the distinct

⁵¹ Jason D. DeBode, Achilles A. Armenakis, Hubert S. Feild, and Alan G. Walker, "Assessing Organizational Culture: Refinement of a Scale," *Journal of Applied Behavioral Science* 49, no. 4 (2013): 461.

⁵² Edgar H. Schein, "Organizational Culture," *American Psychologist* 45, no. 2 (February 1990): 116. "Every group and organization is an open system that exists in multiple environments."

⁵³ Edgar H. Schein, "Coming to a New Awareness of Organizational Culture," *Sloan Management Review* 25, no. 2 (Winter 1984): 3.

⁵⁴ Jennifer Bellott, "Defining and Assessing Organizational Culture," *Nursing Forum* 46, no. 1 (January-March 2011): 31.

layers of organizational culture (partially) mediate the effects of values that support innovation on firm performances.”⁵⁵ This application of Schein’s model in a real-world context underscores its practical utility and the relevance of his work in organizational culture.

Some scholars critique certain aspects of Schein’s model. Mary Jo Hatch critiques Schein’s model. She argues that it is deficient in its treatment of symbols and processes. To address this, she proposes a model that combines Schein’s ideas with symbolic-interpretive perspectives. This alternative model offers a more dynamic understanding of culture, enhancing its utility in analysis and diagnosis for organizational design.⁵⁶

Schein’s model relates well to STS’s emphasis on individual agency, an appreciative view of human nature, and the perspective that culture is a social construct devised and continuously revised by groups responding to external adaptation while addressing internal integration.

Assessing Organizational Culture

Organizational culture assessments encompass the full spectrum of quantitative, qualitative, and mixed-methods approaches, with published inventories, surveys, and guided interviews for organization design interventionists, leaders, and consultants—a

⁵⁵ Suellen J. Hogan and Leonard V. Coote, “Organizational Culture, Innovation, and Performance: A Test of Schein’s Model,” *Journal of Business Research* 67, (2014): 1609-1621, <http://dx.doi.org/10.1016/j.jbusres.2013.09.007>, 1618.

⁵⁶ Mary Jo Hatch, “The Dynamics of Organizational Culture,” *Academy of Management Review* 18, no. 4 (1993): 658.

2009 literature review by Jung et al. lists 70 instruments for formative and diagnostic purposes.⁵⁷ Over 68 percent of the instruments were amenable to psychometric assessment.⁵⁸ Researchers and practitioners face the issue of selecting the appropriate instrument to align the research question with the researcher/practitioner's strengths, aims, and capabilities.

Competing Values Framework

The competing values framework (CVF) and its adjacent assessment tool, The Organizational Culture Assessment Instrument (OCAI), "is probably the most frequently used instrument for assessing organizational culture in the world today."⁵⁹ The OCAI contains six items (dominant characteristics, organizational glue, leadership, management of employees, strategic emphases, and success criteria) describing three universal manifestations of organizational culture: basic assumptions, interaction patterns, and organizational direction.⁶⁰ The instrument assesses three axes of internal-external focus, flexibility-control, and means-ends. This is the operationalized instrument for the Competing Values Framework (CVF). The instrument provides for post-Taylorism collectivism and clear distinctions between employees, management, and executive leadership. However, its overemphasis on conflict within the organization potentially

⁵⁷ Tobias Jung et al., "Instruments for Exploring Organizational Culture: A Review of the Literature," *Public Administration Review*, (November-December 2009): 1089-1090.

⁵⁸ Jung, "Instruments," 1091.

⁵⁹ Kim S. Cameron, and Robert E. Quinn, *Diagnosing and Changing Organizational Culture Based on the Competing Values Framework*, 3rd ed. (San Francisco: John Wiley and Sons, 2011), Kindle, 46.

⁶⁰ Cameron, *Diagnosing and Changing Org. Culture*, 47.

creates a process for endorsing or reinforcing executive leadership approaches. This overlooks employee and management participation in the organizational culture discursive processes endemic to the participatory leadership observed in STS. Consultants utilizing the OCAI must emphasize an action research approach toward cultural change where cross-organizational representation remains throughout change plan recommendations and implementation. Without this representation, the executive leadership might focus on aligning the culture with their desired future, further marginalizing the management and lower-tier employees.

The result is a three-dimensional depiction of current perceived and future desired cultures along four quadrants: Clan, Adhocracy, Hierarchy, and Market.⁶¹ Each has its place and importance in the organization. The clan domain focuses internally on the well-being and development of group members. The adhocracy focuses on responding to the environment and resource acquisition. The market focuses on rationality and productivity for customers. Lastly, the hierarchy focuses on internal stability and control. The diagonally-oppositional dimensions counteract one another, while emphasis-aligned dimensions reinforce one another. Quinn and Rohrbaugh propose that all four dimensions of culture are required within a healthy organization and that leaders benefit from understanding the diagonally oppositional and mutually agreed upon aspects of the model as they illustrate the natural conflict-laden aspect of organizational life with dialectical tension between the four approaches.⁶² Armenakis et al. likewise

⁶¹ Cameron, *Diagnosing and Changing Org. Culture*, 60.

⁶² Robert E. Quinn and John Rohrbaugh, "A Spatial Model of Effectiveness Criteria: Towards a Competing Values Approach to Organizational Analysis," *Management Society* 29, no. 3 (1983): 375.

suggest that balanced organizations are more effective and have higher customer satisfaction.⁶³ The ability to assess current and desired cultural balance among four approaches provides insight and understanding to support leader creation of the “ideal profile of their organization ideal”⁶⁴ and develop a focused change plan.

In 2007, Christian Helfrich conducted a confirmatory factor analysis of the CVF. The results suggest that a two-subscale approach is more appropriate for the data than the original four-subscale model. He also states, “The CVF as a model, or the CVF instrument, may not generalize to Veterans Healthcare Administration or non-managers.”⁶⁵ This raises questions about the tool’s validity for unique professional settings, government organizations, and potentially non-profit organizations where the environment reflects a preference for hierarchical structure rather than participatory leadership endemic to open systems.

In 2014, Heritage et al. conducted a confirmatory factor analysis of the OCAI examining current and ideal cultural perspectives. They found the expected reciprocally-opposed perspectives for three of the four OCAI factors for current but not ideal cultural perspectives, suggesting that the OCAI lacks validity for ideal culture perspectives.⁶⁶

⁶³ Achilles Armenakis, Steven Brown, and Anju Mehta, “Organizational Culture: Assessment and Transformation,” *Journal of Change Management* 11, no. 3 (September 2011): 306.

⁶⁴ Eric A. Goodman, Raymond F. Zammuto, and Blair D. Gifford. “The Competing Values Framework: Understanding the Impact of Organizational Culture on the Quality of Work Life,” *Organizational Development Journal* 19, no. 3 (Fall 2001): 65

⁶⁵ Christian D. Helfrich et al., “Assessing an Organizational Culture Instrument Based on the Competing Values Framework: Exploratory and Confirmatory Factor Analyses,” *Implementation Science* 2, no. 13 (April 2007): 9. <http://www.implementationscience.com/content/2/1/13>

⁶⁶ Brody Heritage, Clare Pollock, and Lynne Roberts, “Validation of the Organizational Culture Assessment Instrument,” *PLoS One* 9, no. 3 (March 2014): <https://doi.org/10.1371/journal.pone.0092879>.

Schein's Three-Tier Framework

Edgar Schein provides his three-tiered framework with a practical emphasis on action research wherein the researcher seeks collaborative assistance from organizational members to gain increased clarity of understanding and subsequent ideas for implementing change. This leads to a mixed-methods approach to assessment with a stronger emphasis on the qualitative aspects,

It is probably studied best by action-research methods, that is, methods that get 'insiders' involved in the research and that work through attempts to 'intervene'...It is probably best to work with qualitative research approaches that combine fieldwork methods from ethnography with interview and observation methods from clinical and consulting work.⁶⁷

The first tier is the artifacts of the organization. The artifacts of an organization are visible products created by the organization, "its architecture, technology, office layout, manner of dress, visible or audible behavior patterns, and public documents such as charters, employee orientation materials, [and] stories."⁶⁸ Artifacts' tangible or publicly observable nature makes them easy to collect or record. The challenge for researchers is understanding the values and assumptions undergirding the artifacts. "To stay at the level of artifacts or values is to deal with the manifestations of culture, but not with the cultural essence."⁶⁹

⁶⁷ Edgar H. Schein, "Organizational Culture," *American Psychologist* 45, no. 2 (February 1990): 18.

⁶⁸ Edgar H. Schein, "Coming to a New Awareness of Organizational Culture," *Sloan Management Review* 25, no. 2 (Winter 1984): 3.

⁶⁹ Schein, "New Awareness," 6.

The second tier is the espoused values of the organization. These “moral or ethical rules remain conscious and are explicitly articulated because they serve the normative or moral function of guiding members of the group as to how to deal with certain key situations as well as in training new members how to behave.”⁷⁰ Many organizations write these into their mission or vision statements. These espoused values only articulate a portion of the culture, leaving much unstated. The researcher might also see incongruence between espoused values and behavior, prioritization of resources, award processes, and communication practices.

The third tier, underlying assumptions, forms the basis for most of an organization’s culture and is unspoken, functioning to motivate actions, problem-solving, decision-making, and group integration or ex-communication. “Pushing past the layer of espoused values into underlying assumptions can be done by the ethnographer once trust has been established or by the clinician if the organizational client wishes to be helped.”⁷¹ For this reason, Schein posits that the role of founding leaders is particularly influential in forming, embedding, and transmitting underlying assumptions and, therefore, beneficial for researchers’ understanding in assessing underlying assumptions. Schein lists ten critical activities and offers, “The most important or potent messages are

⁷⁰ Edgar H. Schein, *Organizational Culture and Leadership* (Hoboken: John Wiley and Sons, 2007), Kindle, 20.

⁷¹ Schein, *Organizational Culture and Leadership*, 112.

role modeling by leaders (item 3), what leaders pay attention to (item 6), and leader reactions to critical events (item 7).”⁷²

Schein’s framework, as intended, helps analyze organizational culture. Armenakis et al. hypothesized that an ethical or unethical organizational culture can be described using Schein’s levels.⁷³ They developed an ethical climate assessment tool and conducted a case study supporting positive organizational change by institutionalizing the desired organizational culture. After parsing symbols from artifacts as a new first tier, Mary Jo Hatch agrees with Schein regarding an action-research approach, offering that ethnographic participation and observation, aesthetic techniques, postmodern ethnography, ethnographic interviews, and discourse analysis are the best methods for studying the four tiers of organizational culture.⁷⁴

Action Research

What is Action Research

Following Taylor’s organizational design approach, where workers were informed of decisions and rarely consulted,⁷⁵ Kurt Lewin applied an alternative research

⁷² Edgar H. Schein, “The Role of the Founder in Creating Organizational Culture,” *Organizational Dynamics*, (Summer 1983): 22. Schein presents 10 mechanisms for embedding and transmitting culture while highlighting three as the most important.

⁷³ Achilles Armenakis, Steven Brown, and Anju Mehta, “Organizational Culture: Assessment and Transformation,” *Journal of Change Management* 11, no. 3 (September 2011).

⁷⁴ Mary Jo Hatch, “The Dynamics of Organizational Culture,” *Academy of Management Review* 18, no. 4 (1993): 678.

⁷⁵ Marianne Kristiansen and Jorgen Bloch-Poulsen. “Participation and Social Engineering in Early Organizational Action Research: Lewin and the Harwood Studies,” *International Journal of Action Research* 2, (2017) 156. <https://doi.org/10.3224/ijar.v13i2.05>.

methodology to problems in organizations, communities, and groups, creating action research;

The research needed for social practice can best be characterized as research for social management or social engineering. It is a type of action research, comparative research on the conditions and effects of various forms of social action, and research leading to social action. Research that produces nothing but looks will not suffice.⁷⁶

Action research invites the participation of a cross-section of the organization, empowering input, insight, and problem-solving as part of building trust and dialogue.⁷⁷ Utilizing this approach, a researcher better understands research as general and specific.⁷⁸ as they generally study a topic and then work to contextualize their knowledge to the specific situation for diagnosis.⁷⁹ The action aspect of this research derives from the focus on action to address a defined problem. Action research is cyclical as the researcher collaborates with the organization or group to assess, develop a plan, implement the plan, and assess via feedback the impact of implementation with vested members of the organization who now function as co-researchers.

For effective action research, Lewin posits that a group must ‘unfreeze’ after the pressure of resistance reaches a point that is less than the perceived discomfort associated with change. The group then ‘moves’ into a new system, process, structure, or

⁷⁶ Kurt Lewin, “Frontiers in Group Dynamics: Concept, Method and Reality in Social Science; Social Equilibria and Social Change,” *Human Relations* 1, no. 1 (1947): 150.

⁷⁷ William Passmore and Frank Friedlander, “An Action-Research Program for Increasing Employee Involvement in Problem Solving,” *Administrative Science Quarterly* 27, no. 3 (September 1982): 347. <https://www.jstor.org/stable/2392316>.

⁷⁸ David Bargal, “Personal and Intellectual Influences Leading to Lewin’s Paradigm of Action Research,” *Action Research* 4, no. 4 (2006): 373. <https://doi.org/10.1177/1476750306070101>.

⁷⁹ Kurt Lewin, “Action Research and Minority Problems,” *Journal of Social Issues* 2, no. 4 (November 1946): 36-37. <https://doi.org/10.1111/j.1540-4560.1946.tb02295.x>.

understanding and institutionalizes or ‘re-freezes’ as it enters a new analysis phase. Because change is part of the process, and people often resist change, Lewin proposed three required elements: research, action, and training. More often, the training is for managers to develop interpersonal skills, communicate, and accept a changed power dynamic as subordinates assume a more prominent and vocal role within the organization.⁸⁰ Kristiansen and Bloch-Paulsen caution about the potential for action research to “unintentionally create new hierarchies or reinforce existing ones, thus leading to the exclusion of certain employees.”⁸¹ They acknowledge that all hierarchies demonstrate power dynamics and offer that the research cannot solve them, but they should handle them transparently and prioritize addressing them in action research.⁸²

Undergirding Lewin’s model is an emphasis on discursive practices: the ability to participate in dialogue and the manager’s willingness to restrain their level of dialogue while inviting those with a lower sense of authority, experience, or insight and recognition that institutions are themselves “understood as products of the discursive activity that influences actions.”⁸³ For this reason, Lewin also argues that proper action

⁸⁰ Kristiansen and Bloch-Paulsen, “Participation,” 162.

⁸¹ Marianne Kristiansen and Jorgen Bloch-Paulsen, “Participatory Hierarchies: A Challenge in Organisational Action Research,” *International Journal of Action Research* 12, no. 2 (2016): 144. <https://doi.org/10.1688/IJAR-2016-02-Kristiansen>.

⁸² Kristiansen and Bloch-Paulsen, “Participatory Hierarchies,” 165.

⁸³ Nelson Phillips, Thomas B. Lawrence, and Cynthia Hardy, “Discourse and Institutions,” *Academy of Management Review* 29, no. 4 (2004): 635.

research requires qualitative interviews, in which open-ended questions that inquire beyond the initial survey responses facilitate a more profound understanding.⁸⁴

Ongoing Research and Opportunities

Maurer and Githens offer an expanded approach to action research with three categories: conventional, critical, and dialogic; “dialogic A.R.’s primary concern is to create understanding and mutual learning in and through dialogue while also leading to practical solutions.”⁸⁵ They also argue that Lewin’s three stages are insufficient and list five stages: initial analysis and contracting, joint diagnosis and feedback, planning and developing intervention, implementation, and institutionalizing and evaluating the intervention.⁸⁶

Another critical issue under discussion in current research is the role of the researcher in action research. The researcher is usually contacted by and initially works with the executive staff or senior leadership. Still, the researcher must retain a curious inquisitiveness regarding the identified problem, the unspoken questions, and the silent members of the group. Passmore and Friedland posit the potential of reinforcing a

⁸⁴ Lewin, “Action Research and Minority Problems,” 37.

⁸⁵ Martin Maurer and Rod P. Githens, “Toward a Reframing of Action Research for Human Resource and Organization Development,” *Action Research* 8, no. 3 (2009): 267. <https://doi.org/10.1177/1476750309351361>.

⁸⁶ Martin Maurer and Rod P. Githens, “Toward a Reframing of Action Research for Human Resource and Organization Development,” *Action Research* 8, no. 3 (2009): 268. <https://doi.org/10.1177/1476750309351361>.

hierarchical disempowerment of group members,⁸⁷ effectively contradicting the potential good associated with Lewin's action research design.

Action research emphasizes empowerment as part of the process's goal. While a traditional view of empowerment is top-down, Sur I. Wong addresses behavior by subordinates seeking empowerment through rational or inspirational influencing behavior when they perceive their leader is unaware of their empowerment expectations.⁸⁸ Soojin Lee et al. also caution that empowerment has limitations; task performance and empowering leadership have a curvilinear relationship with decreased task performance at extremes.⁸⁹ Lee et al. also discuss employee learning orientation's moderating role in task performance, demonstrating a leader-led interdependence to empowerment thresholds and expectations.⁹⁰

Hettie A. Richardson, Donald H. Kluemper, and Shannon G. Taylor expand on empowerment and demarcate consultation and delegation as aspects of empowerment towards task performance. They observe that when leaders solicit "employee's suggestions, ideas, or concerns" (consultation) or transfer "to an employee complete authority for making a decision" (delegation), it facilitates nuanced psychological

⁸⁷ Passmore and Friedlander, "Action Research Program," 347.

⁸⁸ Sur I. Wong, "Influencing Upward: Subordinates' Responses to Leaders' (un)Awareness of their Empowerment Expectations," *The International Journal of Human Resource Management* 30, no. 10 (2019): 1627, <http://dx.doi.org/10.1080/09585192.2017.1299194>.

⁸⁹ Soojin Lee et al., "Never Too Much? The Curvilinear Relationship Between Empowering Leadership and Task Performance," *Group and Organization Management* 42, no. 1 (2016): 27.

⁹⁰ Lee et al., "Never Too Much?" 29.

empowerment.⁹¹ This nuanced psychological empowerment is what leaders must understand and facilitate appropriately to support increased task performance or extra-role behavior. Remaining focused on the role of leaders, Alexander Lapshun and Gene E. Fusch observed that teams treated with trust, dignity, and equitable concern during COVID-19 reported a high emphasis on open feedback as a critical factor in workplace satisfaction and job performance; “the culture of respect for the individual, open-door policy, support, and empathy was evident.”⁹²

Summary of Findings and Themes within Reviewed Literature

Systems Theory, Schein’s organizational culture analysis framework, and Action Research provide a rich foundation for analyzing subgroup dynamics within the Chaplain Corps. The positivist approach of STS demonstrates awareness of the individual agency and the potential for conflicting values across STSs for individuals and subgroups. Within this complex understanding of multi-variable influences affecting external adaptation and internal integration, Schein’s framework provides a practical heuristic for examining organizational culture with attention to incongruence between espoused values and perceived underlying assumptions. Action research then provides a method, like Brinkerhoff’s Success Case Method,⁹³ to empower organizational members to participate

⁹¹ Hettie A. Richardson, Donald H. Klumper, and Shannon G. Taylor, “Too Little and Too Much Authority Sharing: Differential Relationships with Psychological Empowerment and In-role and Extra-role Performance,” *Journal of Organizational Behavior* 42, (2021): 1102.

⁹² Alexander Lapshun and Gene E. Fusch, “Times of Uncertainties Require Embracing Leadership and Feedback,” *The Qualitative Report* 28, no. 3 (March 2023): 838.

⁹³ Robert O. Brinkerhoff, *The Success Case Method: Find Out Quickly What’s Working and What’s Not* (San Francisco: Barrett-Koehler Publishers, INC, 2003), Kindle.

through in-depth articulation of best and worst-case practices that serve as exemplars of organizational success.

The concepts of interdependence of social and technical systems, self-management, role and boundary formulation, and humanizing employee agency⁹⁴ figure prominently across the theories and frameworks. This signals a shift toward decentralized process implementation and maximum flexibility for semiautonomous group processes.

In 1981, Eric Trist highlighted this shift,

Traditional organizations serve only their own needs. They are, and indeed are supposed to be, selfish. The new paradigm imposes the additional task of aligning their own purposes with the purposes of the wider society and also with the purposes of their members. By so doing, organizations become both ‘environmentalized’ and ‘humanized.’⁹⁵

Another theme in Socio-Technical and Open Systems theory, action research, and Edgar Schein’s framework emphasizes the iterative nature of analysis and change. The external adaptation required of open systems and internal integration of systems seeking relative homeostatic balance in a shifting environment requires that,

the Sociotechnical systems design process should be iterative or never-ending. The question ‘How can we improve upon the way we operate?’ It should always

⁹⁴ Ingrid M. Nemphard and Amy C. Edmondson, “Making it Safe: The Effects of Leader Inclusiveness and Professional Status on Psychological Safety and Improvement Efforts in Health Care Teams,” *Journal of Organizational Behavior* 27, (2006) 947. <https://doi.org/10.1002/job.413>. The authors highlight the importance of creating space for questions and challenges to facilitate a learning environment that supports internal integration to support external adaption. “If a leader takes an authoritarian, unsupportive, or defensive stance, team members are more likely to feel that speaking up in the team is unsafe. In contrast, if a leader is democratic, supportive, and welcomes questions and challenges, team members are likely to feel greater psychological safety in the team and in their interactions with each other.”

⁹⁵ Eric L. Trist, “The Evolution of Socio-Technical Systems: A Conceptual Framework and an Action Research Program (Paper presented at the Conference on Organizational Design and Performance, Ontario, Canada, June 1981), 43.

remain open. To a large extent, maintenance of this action-research-based process is more important than any given design solution.⁹⁶

Triangulation of Theoretical Framework with the Chaplain Corps

Understanding the Chaplain Corps as a System

Viewing organizations as open systems responding to the external environment, consuming resources, and producing outputs that determine the organization's viability based upon available resources and marketplace demand epitomizes the customer-centric approach an organization like the Chaplain Corps needs to practice to remain relevant in an environment like the Army where relevance impacts continued access to resources. It also supports an understanding that "the system is interconnected with its environment."⁹⁷ For the Chaplain Corps, this interdependency is reflected in the integrated nature of the chaplaincy within Army organizations across the enterprise, the Chaplain Corps' ability to secure resources within the larger Army, and the Chaplain Corps' ability to provide services that meet the demands of the system within which it operates. A more nuanced approach to this is reflected in STSs,⁹⁸ where multiple overlapping systems impact the larger environment. Researchers understand that systems comprise both technical and social dimensions and that changes in any part of an STS

⁹⁶ William H. Fox, "Sociotechnical System Principles and Guidelines: Past and Present," *The Journal of Applied Behavioral Science* 31, no. 1 (1995): 100.

⁹⁷ Donald L. Anderson, *Organization Development: The Process of Leading Organizational Change*, 5th ed. (Los Angeles: Sage Publishing, 2020), Kindle, 75.

⁹⁸ Anderson, *Organization Development*, 30.

necessitate change throughout the system.⁹⁹ Individuals belong to multiple STSs, each influencing their behavior. For military chaplains, these overlapping systems include the Chaplain Corps, their religious organization, and the Army, with each system affected by internal changes and environmental impacts.

The technical aspect of the Chaplain Corps consists of the physical facilities, technology, operational equipment for religious support and tactical operations, guiding documents and procedures for facilitating the free exercise of religion, and appropriated or non-appropriated funds for religious support activities and materials. The technical aspect also consists of the services or products provided. Where STS theory seems to treat the technical aspect as inert, Schein's model provides insight into understanding how artifacts communicate espoused values and underlying basic assumptions. An example would be chapel design and what technology is considered essential. Another example is how funding for religious groups.¹⁰⁰ symbolizes something regarding beliefs and values. Underlying basic assumptions of individual agents might drive designs, construction, and acquisition, thereby facilitating or limiting desired services or products.

The social aspect of the Chaplain Corps consists of the organizational structure of the Chaplain Corps with integrated assignments across the Army enterprise and the

⁹⁹ Charles Glisson, "Assessing and Changing Organizational Culture and Climate for Effective Services," *Research on Social Work Practice* 17, no. 6 (November 2007): 738. "A central assumption of the sociotechnical model is that organizational effectiveness depends as much on social processes as on technical processes."

¹⁰⁰ The term "religious groups" here refers to various world religions and expressions as demonstrated through groups on military installations requesting access to facilities, funds, and material support. The garrison or senior command chaplain prioritizes space, schedule, and fund allocation across all represented religious groups.

supervisory channels of chaplains and commanders exercising leadership and management of the Chaplain Corps. The social aspect also consists of the individual chaplains, religious affairs specialists, and directors of religious education. By nature of the endorsement and DOD credentialing requirement, individual chaplains belong to religious organizations that function as STSs, creating additional social requirements and affinities. This dual membership creates interdependencies for members and organizations. This interdependence of STSs requires researchers to exercise caution in attributing aspects of organizational culture to external adaptation rather than internal integration,¹⁰¹ especially as conflictual underlying basic assumptions create conflicting expectations or behavior among members of the Chaplain Corps.

The interdependence of the social aspects and the challenge of interpreting artifacts through a deeper exploration of espoused values and underlying basic assumptions are critical strengths of Schein's framework for assessing organizational culture.

Assessing the Chaplain Corps Utilizing Schein's Framework

Artifacts

Artifacts include the visible products of the group, such as the architecture of its physical environment; its language; its technology and products; its artistic creations; its style, as embodied in clothing, manners of dress, and emotional displays; its myths and stories told about the organizations; its published lists of values; and its observable rituals and ceremonies...Structural elements such as

¹⁰¹ Schein, *Organizational Culture and Leadership*, 8.

charters, formal descriptions of how the organization works, and organization charts also belong to the artifact level.¹⁰²

Chaplain Corps artifacts include founding narratives, U.S. Code, Public Law, DOD Policy, Army Regulations, formalized structure within the Army, symbols, mottos, uniform items, rituals and ceremonies, and historical recollections of heroic chaplains and religious affairs specialists. Across these artifacts, a pattern emerges of dignified and respectful support and advocacy for the free exercise of religion for all authorized personnel.

The Chaplain Corps' founding narratives¹⁰³ highlight the chaplaincy's task to support militia and regular militaries enduring harsh conditions while fighting for independence and requiring religious inspiration and support in austere and remote locations.¹⁰⁴

The founding narrative also highlights the pluralistic culture and multiple traditions in the chaplaincy to encourage and inculcate a commitment to religious freedom in a pluralistic setting:

¹⁰² Schein, *Organizational Culture and Leadership*, 17. Schein posits that all tangible and observable aspects of an organization are artifacts. This includes all espoused values because espoused values are articulated products of the organization. Not all artifacts are espoused values, but speak to underlying assumptions or technical aspects of the organization without intrinsic value merits. Some artifacts are aspects of the technical side of the organization, like any technical aspect of STSs. These technical aspects carry potential to influence values of the organization as the organization develops means of problem-solving and behavioral expectations influenced by the technical aspects of the organization.

¹⁰³ Department of the Army, Army Regulation (AR) 165-1, *Army Chaplain Corps Activities*, (Washington, DC: Department of the Army, 05 February 2024), 1.

¹⁰⁴ Department of the Army, Army Regulation (AR) 165-1, *Army Chaplain Corps Activities*, (Washington, DC: Department of the Army, 05 February 2024), 1. "The Continental Congress established chaplains as an integral part of the Army of the United States on 29 July 1775. Chaplains have served in significant numbers from the earliest battles of the American War of Independence to the present. From the beginning, the Army has turned to chaplains in order to Nurture the Living, Care for the Wounded, and Honor the Fallen."

In the pluralistic religious setting of the military, the Chaplain Corps performs or provides religious support for all Soldiers, Family members, and authorized Department of Defense (DOD) Civilians from all religious traditions. Chaplains cooperate with each other, without compromising their religious tradition or ecclesiastical endorsement requirements, to ensure the most comprehensive religious support opportunities possible within the unique military environment.¹⁰⁵

DOD policy echoes this commitment to comprehensive religious support in a pluralistic environment with Department of Defense Instruction 1300.17 and DODI 1304.28. DODI 1300.17 states, “Service members have the right to observe the tenets of their religion or to observe no religion at all.”¹⁰⁶ DODI 1304.28 further outlines the responsibilities of both chaplains and their respective endorsing agencies regarding support of all religious expressions, including providing counseling that is not faith-based and referring service members to other chaplains or civilian faith-based organizations if the chaplain is unable to provide religious support requested by the individual;

Chaplains...are authorized by their respective religious-endorsing organizations to address issues of spirit, conscience, or well-being that may not be exclusively ministerial in nature or defined by their religious-endorsing organization. Such care and counseling are rooted in ethics and morality and may or may not be faith based at the person’s request. The well-being of the person receiving such services will always receive the highest priority...

If a chaplain is unable to support a specific request because of his or her religious-endorsing organization’s teachings, the chaplain must offer referral to another chaplain or professional. Such referrals are accomplished respectfully, professionally, and in a reasonable period of time, in accordance with the policies of the Military Department concerned.¹⁰⁷

¹⁰⁵ Department of the Army, Army Regulation (AR) 165-1, *Army Chaplain Corps Activities*, (Washington, DC: Department of the Army, 05 February 2024), 2.

¹⁰⁶ Department of Defense, Department of Defense Instruction (DODI) 1300.17, *Religious Liberty in the Military Services*, (Washington, DC: Department of Defense, 01 September 2020), 4.

¹⁰⁷ Department of Defense, DODI 1304.28, 5-6.

Recognizing potential incongruence between homogenous faith communities and the pluralistic environment where chaplains provide support, DODI 1304.28 clarifies expectations for the endorsing agencies.

Religious-endorsing organizations participating in the military chaplaincies must recognize that the chaplaincies of the Military Departments serve a religiously diverse population and that military commanders must provide comprehensive religious support to all authorized individuals in their areas of responsibility. Religious organizations participating in the military chaplaincies must express willingness for their RMPs to perform their professional duties as chaplains in coordination with chaplains from other religious traditions.¹⁰⁸

The Chaplain Corps is teeming with symbols, logos, and uniform items that communicate this commitment to supporting a pluralistic population. Chaplain Corps branch insignia underwent many transformations and additions since 1775, reflecting growing diversity within the Chaplain Corps and American society. The Chaplain Corps crest, also known as the Distinctive Unit Insignia (DUI), worn by all uniformed service members within the Chaplain Corps, bears the motto *Pro Deo et Patria*, which translates as “For God and Country.” The motto reminds members of their dual obligation to the United States of America and their respective faith traditions. The DUI (figure 2.1) was modified under Chaplain (Major General) Zimmerman (Army Chief of Chaplains, 1990-1994), removing the cross and tablets to reflect a more religiously diverse Chaplain Corps (Appendices H–L).¹⁰⁹

¹⁰⁸ Department of Defense, DODI 1304.28, 12.

¹⁰⁹ Anne Loveland, *Change and Conflict in the U.S. Army Chaplain Corps Since 1945*, (Knoxville: University of Tennessee Press, 2014), 224.



Figure 2.1. Chaplain Corps Regimental Insignia.¹¹⁰

Another critical group of artifacts is the historical narratives perpetuated across the Chaplain Corps of heroic chaplains, emulating the values expected of every member of the Chaplain Corps. The stories of the Four Chaplains of the *Dorchester*,¹¹¹ Father Emil Kapaun,¹¹² and Chaplain Jonathan Watters,¹¹³ span from World War II to the Vietnam War as prescient reminders of the cost and a call to sacrificial service for the benefit of others. The four chaplains aboard the *Dorchester* all came from different faith traditions (Jewish, Catholic, Methodist, and Reformed) and served and sacrificed for the sake of others as their Army transport sank in the freezing waters of the northern Atlantic

¹¹⁰ Chaplain Corps Branch Insignia, *The Institute of Heraldry*, online: <https://tioh.army.mil/Catalog/Heraldry.aspx?HeraldryId=15288&CategoryId=9362&grp=2&menu=Uniform%20Services&from=search>, accessed 16 April 2022.

¹¹¹ James H. Clifford, “No Greater Glory: The Four Chaplains and the Sinking of the USAT *Dorchester*,” *Army History*, online: <https://armyhistory.org/no-greater-glory-the-four-chaplains-and-the-sinking-of-the-usat-dorchester/>, accessed 19 March 2022.

¹¹² “The Story of Father Emil J. Kapaun,” *Father Kapaun Cause*, online: www.FatherKapaun.org, accessed 19 March 2022.

¹¹³ “Chaplain (MAJ) Charles J. Watters,” *Army History*, online: <https://armyhistory.org/chaplain-maj-charles-j-watters/>, accessed 19 March 2022.

Ocean shortly after 0055 on the 4th of February 1943. Survivors recalled the chaplains giving away their coats, gloves, and life vests as the ship sank after being struck by a German U-boat. Several reported seeing the chaplains huddled on the deck, singing and praying as the vessel sank beneath the frigid waves. Chaplains Kapaun and Watters likewise demonstrated care for all and sacrificially lost their lives because of enemy hostility. Chaplain Corps personnel learn these stories, participate in annual celebrations of the Four Chaplains, and highlight their service, sacrifice, and inter-faith solidarity.

Espoused Values

The espoused beliefs and moral or ethical rules remain conscious and are explicitly articulated because they serve the normative or moral function of guiding members of the group as to how to deal with certain key situations as well as in training new members how to behave.¹¹⁴

Army regulations, doctrinal publications, recruiting publications, individual critical task lists, training plans, and evaluation procedures articulate the Chaplain Corps' espoused values. Commitment to these values is assessed informally by peers and formally by supervisors and training cadre.

Army Doctrine Publication (ADP) 6-22 lists seven Army values “that all Soldiers and DA Civilians must internalize.”¹¹⁵ The seven values form an acronym that is a homophone for the word leadership - LDRSHIP. The seven values are Loyalty, Duty, Respect, Selfless Service, Honor, Integrity, and Personal Courage. Integrated into all military training and education from initial entry or commissioning to senior leader

¹¹⁴ Schein, *Organizational Culture and Leadership*, 20.

¹¹⁵ Department of the Army, Army Doctrine Publication (ADP) 6-22, *Army Leadership and the Profession*, (Washington, DC: Department of the Army, 31 July 2019), 2-2.

professional military education, the Chaplain Corps teaches and reinforces these Army values in all courses, branch-specific regulations, DA Pamphlets, and doctrine publications.

The Chaplain Corps created its values and published them in Training Circular (T.C.) 1-05, *Religious Support Handbook for the Unit Ministry Team*, which outlines the Chaplain Corps' values of Spirituality, Accountability, Compassion, Religious Leadership, Excellence, and Diversity (SACRED).¹¹⁶ Despite rescindment around 2015, the Chaplain Corps still references these values within "The Army Chaplain's Creed"¹¹⁷ in recruitment brochures. "The Army Chaplain's Creed" outlines several values: competence, professionalism, untiring drive, faithfulness, protection of religious freedom, and membership in a diverse team. Within this creed, chaplains also refer to the three core competencies of the Chaplain Corps, which are codified and expounded upon in Army doctrine: Nurture the Living, Care for the Wounded, and Honor the Dead.¹¹⁸ As core competencies, these three items define the focal energies of the Chaplain Corps in executing its assigned mission. Every team member understands that these competencies define success or failure for the individual and the Chaplain Corps. From these three competencies flows everything of relevance for the Chaplain Corps.

¹¹⁶ Department of the Army, Training Circular (TC) 1-05, *Religious Support Handbook for the Unit Ministry Team*, Washington, DC: Department of the Army, May 2005), F-1.

¹¹⁷ "Chaplain Corps a Sacred Calling Brochure," *USARLA Training Portal*, online: <https://usarlatraining.army.mil/documents/10854629/11006719/CH+Corps+a+Sacred+Calling+Brochure.pdf/20ab0d01-8f99-41ae-8590-1e30265c8fbd>, accessed 10 April 2022.

¹¹⁸ Department of the Army, Field Manual (FM) 1-05, *Religious Support*, (Washington, DC: Department of the Army, 21 January 2019), 1-4.

The Chaplain Corps integrates these espoused values into the Individual Critical Task List (ICTL).¹¹⁹ and doctrine library, consisting of one Field Manual and five Army Technical Publications,¹²⁰ providing detailed information on tasks and competencies that translate these values and aspirations into observable activity. The ICTL offers an exhaustive list by skill level for tasks, providing a complete description of the task and a checklist for evaluating demonstrated proficiency. This process forms the practical basis for ensuring espoused values find expression in normative behavior for problem-solving across the Chaplain Corps.

Underlying Assumptions

If Schein's approach to underlying assumptions "defines for us what to pay attention to, what things mean, how to react emotionally to what is going on, and what actions to take in various kinds of situations,"¹²¹ then emotional responses and conflict are opportunities to analyze these deeper assumptions. Where the emotions are unanimous, we find social acceptance of assumptions or an opportunity for deeper exploration to understand the rationale and logic of incongruence with espoused values. Situations and instances of conflict and change are excellent opportunities to evaluate underlying assumptions. In other words, times of change heighten the ability to see the

¹¹⁹ "Individual Critical Task List (ICTL)," *USARLA Training Portal*, online: <https://usarlatraining.army.mil/analyst>, accessed 10 April 2022.

¹²⁰ The five Army Technical Publications (ATPs) are housed online at: <https://armypubs.army.mil/ProductMaps/PubForm/ATP.aspx>. The Chaplain Corps ATPs are ATP 1-05.01, *Religious Support and the Operations Process*, ATP 1-05.02, *Religious Support to Funerals and Memorial Events*, ATP 1-05.03, *Religious Support and External Advisement*, ATP 1-05.04, *Religious Support and Internal Advisement*, and ATP 1-05.05, *Religious Support and Casualty Care*.

¹²¹ Schein, *Organizational Culture and Leadership*, 22.

underlying assumptions that essentially sit below the surface until challenged. Rather than spend time on areas with apparent agreement, like the historical narratives of heroic Chaplain Corps personnel, instances of fissures reveal more about the assumptions of the free exercise of religion. Examples of perceived fissures include the integration of female chaplains, modifications to the Chaplain Corps crest, prayer in Jesus' name, and same-sex marriage and transgender integration.

Chaplain Corps Challenges and Adaptations

Integration of Female Chaplains (1974)

The first female chaplain, Florence Henderson, was commissioned on July 8, 1974. As the military population echoed the civil turbulence surrounding civil rights, women's rights,¹²² gay rights,¹²³ and anti-war protests of the 1960s and 1970s, leaders within the Chaplain Corps and the Black Chaplain Workshop endeavored "to steer the chaplaincy toward a grander vision of ministry."¹²⁴ Chaplain Henderson served 13 years as a chaplain before returning to church ministry in the African Methodist Episcopalian denomination. Today, females represent approximately 6% of the active component

¹²² Chelsea Griffis, "In the Beginning Was the Word: Evangelical Christian Women, the Equal Rights Amendment, and Competing Definitions of Womanhood," *Frontiers* 38, no. 2 (2017): 148. The Equal Rights Amendment was adopted by the Senate in 1972 and is still pending ratification.

¹²³ Simon Hall, "Protest Movements in the 1970s: The Long 1960s," *Journal of Contemporary History* 43, no. 4 (October 2008): 656.

¹²⁴ Ronit Y. Stahl, *Enlisting Faith: How the Military Chaplaincy Shaped Religion and State in Modern America*, (Cambridge: Harvard College, 2017), 302-305.

chaplains,¹²⁵ remaining a minority in the Army. Anecdotal experience and low representation suggest that the pluralistic value of the Chaplain Corps is still aspirational. Female chaplains report being marginalized and sidelined in chapel services and leadership. One female chaplain stated that a garrison chaplain welcomed the new chaplains and invited them to a professional mentoring program for all chaplains except the female because he “cannot meet alone with a female.”¹²⁶ Other female chaplains report males refusing to attend chapel when they preach or lead the service. Others state that male chaplains rarely invite female chaplains to serve in active ministry as part of established chapel services.

When asked about this incongruence, the male chaplains often point to their religious organization’s doctrinal beliefs and practices regarding the role of females in the local congregation and family. This means that underlying assumptions informed by denominational distinctions lead to the marginalization of female chaplains within the Army Chaplaincy and circumvent full participation in facilitating the free exercise of religion. From a socio-historical perspective, the inclusion of female chaplains correlates with second-wave feminism of the late 1960s and early 1970s, where previously undiscussed topics like the nuclear family, industrialism, and the politics of sexuality and

¹²⁵ “The 5.8%: The Journey into the Chaplain Corps,” *Army.mil*, online: https://www.army.mil/article/255112/the_5_8_percent_the_journey_into_the_chaplain_corps#:~:text=These%20chaplains%20served%20alongside%20Soldiers%20and%20provided%20them,only%205.8%25%20of%20the%20chaplain%20corps%20are%20women., accessed 16 April 2022.

¹²⁶ Reported via telephonic conversation regarding a first-term chaplain reporting to the senior chaplain’s office as part of in-processing her first duty station.

gender were openly discussed and critiqued.¹²⁷ As members of one STS (the Chaplain Corps), Chaplains experienced tension with the expectations of another STS (their religious organization). This tension reveals a disconnect between the expectation of professional pluralism expressed in the artifacts, espoused values, and the lived experience of female chaplains. Another friction point behind this is the religious organization's appeal to the separation of church and state, leading to appeals of autonomy that contradict expectations outlined in DODI 1304.28 with limited means for accountability. From an STS perspective, this is where the social side (individual members) of the Chaplain Corps operates in contradiction to the technical side (policy and regulation).

Chaplain Corps Crest (1993)

In 1992, the Chief of Chaplains requested (Appendix I) a review of all “emblems of the chaplain branch be revised in order to reflect the growing pluralism within our ranks.”¹²⁸ The Institute of Heraldry (TIOH) reviewed all Chaplain Corps insignia and submitted revisions approved by the Chief of Chaplains (Appendix J). One change was removing the cross and tablets from the Distinctive Unit Insignia (commonly referred to as the “Chaplain Crest”). On 11 February 1993, the Institute of Heraldry issued a memorandum approving the new crest and rescinding (Appendix K) the old crest (figure

¹²⁷ J. Zeitz, “Rejecting Center: Radical Grassroots Politics in the 1970s – Second-wave Feminism as a Case Study,” *Journal of Contemporary History* 43, no. 4 (2008): 676.

¹²⁸ Matthew A. Zimmerman, Memorandum to the Director of the Institute of Heraldry 20 August 1992, “Revision of Distinctive Chaplain Corps Designs,” Emailed to the researcher from the digital archives of the U.S. Army Institute of Heraldry.

2.1). The changes to the crest represented part of a larger Chaplaincy vision transitioning to “a chaplaincy that is diverse, inclusive and responsive to Army leadership; a chaplaincy serving soldiers, families, and the nation.”¹²⁹ Some Chaplain Corps members refused to wear the new Chaplain Corps crest, viewing the changes as a move toward secularism amidst a parallel worldwide rise in religious fundamentalism in response to modernity and postmodernity.¹³⁰ In 2023, a senior chaplain assigned to the Office of the Chief of Chaplains encouraged junior chaplains to purchase the older version at the Military Clothing and Sales Store on Joint Base Myer-Henderson Hall.¹³¹

Public Prayer (2005)

Anne Loveland outlined the tensions around public prayer, chaplains’ rights to pray according to the tenets of their faith, and the rights of religious freedom of service members standing in formations where public prayer occurs.¹³² This issue led to debate and conversation among chaplains, the media, and Congress through the early 2000s. Concerns on one side of the matter are that service members were forced to participate in sectarian religious activity. Conversely, chaplains and their endorsing agents were

¹²⁹ Anne Loveland, *Change and Conflict in the U.S. Army Chaplain Corps Since 1945*, (Knoxville: University of Tennessee Press, 2014), 224.

¹³⁰ Michael O. Emerson and David Hartman, “The Rise of Fundamentalism,” *Annual Review of Sociology* 32, (2006): 128. For more information on the rise of modernity and accompanying rise in religious fundamentalism review this article that outlines the shift across multiple faith groups and countries since 1970. The authors cogently argue “that the demystification of the world provided within the seeds both for the remystification of the world and resistance to the demystification.”

¹³¹ Unattributed text message from the chaplain to a chapel team. The author was a recipient of the text message.

¹³² Anne Loveland, *Change and Conflict in the U.S. Army Chaplain Corps Since 1945*, (Knoxville: University of Tennessee Press, 2014), 194-228.

aggrieved by limitations on the free exercise of religion by chaplains. In contrast to the espoused value of pluralism and respect, the emphasis shifted towards the chaplains' rights rather than the served population. This shift parallels Barbara Kellerman's critique of leadership, which focused on the person (leader) instead of three equal parts of leadership: the leader, the follower(s), and the context.¹³³

Viewing the Chaplain Corps as an STS transforms how the Corps lives its mission. Chaplains have a role and authority, but they are always in service to service members, their dependents, and authorized civilians. The chaplain-centric movement of 2005 was perceived by many as undermining the free exercise of religion.

As an STS responds with the desired products and services, it meets the external adaptation required for its survival and legitimacy.¹³⁴ When the STS fails to provide the desired services and products due to individuals' competing priorities and allegiances to other STSs (religious organizations), an internal integration challenge hinders or prevents external adaptation.

Same-Sex Marriage and Transgender Integration (2010)

With the Don't Ask, Don't Tell Repeal Act of December 2010,¹³⁵ questions arose regarding whether chaplains could be ordered to conduct weddings or marriage

¹³³ Barbara Kellerman, "Leadership – It's a System, not a Person!" *Daedalus: The Journal of the Academy of Arts & Sciences* 145, no. 3 (2016): 84. Kellerman further argues that this overemphasis on the leader's person is the natural byproduct of the "Great Man Theory" promulgated by Thomas Carlyle.

¹³⁴ Schein, *Organizational Culture and Leadership*, 152.

¹³⁵ Don't Ask, Don't Tell Repeal Act of 2010, *Public Law 111-321, 111th Cong., 1st sess.* (December 22, 2010), <https://www.congress.gov/bill/111th-congress/house-bill/2965>.

counseling for same-sex couples. Debate ensued by both chaplains and endorsing agents, yet existing policy (DODI 1304.28) already guided both the protections and responsibilities of chaplains. Again, the conversations within the chaplaincy generally centered on protection for chaplains. In a Congressional Research Service report, Cynthia Bougher notes, “Clergy and spiritual leaders traditionally benefit from heightened protection from claims of discrimination or unequal treatment of others, but it is also important to note that the military operates under a unique set of rules in contrast to the civilian society in which doctors and clergy may be afforded heightened conscience protections.”¹³⁶ The initial response of the Chaplain Corps was to designate chaplains as “restricted” or “unrestricted” in terms of whether they could facilitate a marriage enrichment event with same-sex couples in attendance. The process sought to strike a balance between supporting soldiers and upholding the rights of chaplains. The process decidedly favored safeguarding the individual chaplain’s rights while avoiding claims of discrimination or inequitable access to resources.

The executive order opening military service to transgender personnel¹³⁷ received immediate attention from an Army Chaplain posting denigrating comments on the Army Times' Facebook page.¹³⁸ A transgender chaplain responded with a letter to the

¹³⁶ Cynthia Bougher, *Military Personnel and Freedom of Religion: Selected Legal Issues*, CRS Report No. R41171, Washington, DC: Congressional Research Service, 2010, <https://sgp.fas.org/crs/misc/R41171.pdf>.

¹³⁷ Joseph R. Biden, Executive Order 14004, “Executive Order on Enabling All Qualified Americans to Serve Their Country in Uniform,” *Code of Federal Regulations*, title 3 (2021 comp.): 466-469.

¹³⁸ Howard Altman, “Chaplain’s Facebook Post Denigrating Transgender Troops Under Investigation by Army,” *ArmyTimes*, online: <https://www.armytimes.com/news/your-army/2021/01/27/chaplains-facebook-post-denigrating-transgender-troops-under-investigation-by-army/>, accessed 05 April 2022.

editor.¹³⁹ Another chaplain weighed in, alleging the Army Chaplaincy failed to care for all with dignity and respect.¹⁴⁰

Schein Analysis Summary

Applying a post-positivist perspective and viewing the Army as an STS and the Chaplain Corps as an STS embedded within the Army, Schein's open systems approach toward defining organizational culture and his accompanying three-tier assessment framework provides granular detail of the congruence and incongruence of the phenomenological expression of the free exercise of religion by the Chaplain Corps. The organizational culture assessment of the Chaplain Corps further provides the impetus for addressing incongruencies or accepting the associated risks with current practices.

These points of unresolved internal integration reveal diverse underlying assumptions among individual members of the Chaplain Corps that conflict with organizational espoused values. While the illustrated tensions primarily speak to internal integration issues within the Chaplain Corps, there is a similar opportunity for examining how this impacts external adaptation by facilitating the free exercise of religion for the supported population. The benefit of Schein's emphasis on mixed-method and thick narrative description is its ability to gain an increased understanding of the underlying

¹³⁹ Chaplain (Major) Rebecca A. Ammons, U.S. Army, "Letter to the Editor: Countering Army Chaplain's Views on Transgender Community," *ArmyTimes*, online: <https://www.armytimes.com/opinion/2021/02/04/letter-to-the-editor-countering-army-chaplains-views-on-transgender-community/>, accessed 04 February 2021.

¹⁴⁰ Chaplain (Major) David A. Evans, U.S. Army, "Starting Again: A Call for Chaplains to Reconcile and Properly Support LGBTQI+ Soldiers," *ArmyTimes*, online: <https://www.armytimes.com/opinion/commentary/2021/06/01/starting-again-a-call-for-chaplains-to-reconcile-and-properly-support-lgbtqi-soldiers/>, accessed 03 June 2022.

assumptions following an initial analysis of artifacts and espoused values. The philosophical underpinning of STS thinking and Schein's cultural diagnostic perspective provide a valuable framework for understanding how chaplains function within the Chaplain Corps while simultaneously representing their respective religious organizations and the potential for tension or conflict. His emphasis on action research creates a perspective for critical analysis of organizational culture. The limitation of Schein's approach is that it demonstrates congruence or incongruence yet provides no framework for organizational design to implement change. Schein provides the catalyst for unfreezing organizational culture¹⁴¹ as the model exposes unacceptable incongruity that threatens external adaptability or reveals internal integration challenges that contradict espoused values representing the core organizational identity. Organizational design, however, requires a framework like Brinkerhoff's Success Case Method to develop and implement an action plan that addresses the incongruities revealed through Schein's critical analysis.

Forecast of Chapter Three

This chapter attempted to introduce the research in areas that apply to understanding the Chaplain Corps' approach toward facilitating the free exercise of religion within the Army. STS and action research utilizing Edgar Schein's organizational culture framework provide a pragmatic approach to understanding the extant interdependencies of the Chaplain Corps, its members, the supported population,

¹⁴¹ Kurt Lewin, "Frontiers in Group Dynamics: Concept, Method and Reality in Social Science; Social Equilibria and Social Change," *Human Relations* 1, no. 1 (1947): 34-35. <https://doi.org/10.1177/001872674700100103>.

and external stakeholders. While demonstrated incongruence between espoused values and practices exists within the Chaplain Corps, there is a gap in the literature regarding leadership and organizational approaches and support for alignment and reinforcement of practices that consistently support the free exercise of religion for the supported population. For this reason, research begins an informed conversation grounded in established leadership theory, emphasizing growth and improvement that draws from best practices from across the multi-tiered echelons of practices within the Chaplain Corps.

Chapter three presents a mixed-methods approach to discovering the best and worst practices of chaplains facilitating the free exercise of religion within the active component Army. Utilizing Robert Brinkerhoff's Success Case Method, research will solicit broad perspectives and experiences with a 15-question quantitative survey. Volunteers whose survey responses comprise the most or least desirable behaviors or attitudes will be invited to participate in guided interviews. The guided surveys aim to understand the phenomenology of facilitation of the free exercise of religion in thick-description narratives and analyze the critical leadership practices associated with best-case practices. The research will result in descriptive and compelling exemplars of contemporary practices for study, dialogue, and emulation by current Army chaplains and their respective religious organizations.

CHAPTER THREE

Methodology

Introduction

This chapter presents the methodology for a mixed-methods phenomenological approach employing the Success Case Method (SCM).¹ of quantitative surveys and guided interviews capturing thick-description narratives of the facilitation of the free exercise of religion by the United States Army Chaplain Corps. The purpose is to broadly assess attitudes and practices toward facilitating the free exercise of religion by Army Chaplains with a quantitative survey and then conduct guided interviews of the best-case observations and experiences to gain an understanding that can be reported utilizing compelling narratives grounded in sound research methodology. SCM facilitates capturing and perpetuating best-case narratives that create opportunities to gain clarity of understanding through narrative descriptions of verifiable.² practices and observations for the Army Chaplain Corps. SCM also provides an opportunity to fully understand the impact of initiatives and practices within the training institution, the installation-level training, and endorsing agency training and support. For this reason, the research aims to capture verifiable thick-description narratives of best-case practices, analyze the critical

¹ Robert O. Brinkerhoff, *The Success Case Method: Find Out Quickly What's Working and What's Not* (San Francisco: Barrett-Koehler Publishers, INC, 2003), Kindle.

² Brinkerhoff, *Success*, Chapter 1. "This interview portion of the study provides us with "stories" of use and results. Importantly, these interviews views focus on the gathering of verifiable and documentable evidence so that success can be 'proven.'"

leadership descriptors and behaviors associated with each, and provide exemplary role models to teach and motivate others.³ within the Army Chaplain Corps.

The Success Case Method is grounded in a transformative paradigm utilizing case studies.⁴ After identifying potential interviewees using a quantitative survey, the study will engage in qualitative inquiry to understand perceptions and attitudes. SCM focuses on analyzing interviews to assist the organization and individuals in understanding the current situation more accurately and engaging in more inclusive behavior.⁵ However, this requires critical analysis and self-reflection to recognize the aspirational nature of espoused values within the organization.

The chapter addresses the research purpose, design, plan, population and sample selection processes, data collection and analysis procedures, and study limitations.

Research Purpose

This study explores compelling and valid narratives of best-case experiences of facilitation of the free exercise of religion in the U.S. Army by Army Chaplains. The primary research question is: What compelling and valid narratives of best-case facilitation of the free exercise of religion exist within the U.S. Army Chaplaincy? The related research questions are: (1) What descriptors of leader qualities, behaviors, and attitudes are provided in the best-case reports of facilitating the free exercise of religion?

³ Brinkerhoff, *Success*, Chapter 8. Brinkerhoff posits this as one of the SCM report options for organizations using the SCM.

⁴ S.L.T. McGregor and J. A. Murnane, "Paradigm, methodology, and method: Intellectual integrity in consumer scholarship," *International Journal of Consumer Studies* 34, no. 4 (2010): 419-427.

⁵ Jack S. Levy, "Case Studies: Types, Designs, and Logics of Inference," *Conflict Management and Peace Science*, no. 25 (2008): 3. Jack Levy offers a parallel assessment of case studies, viewing case studies as "illustrative" and "ideal types."

Furthermore, (2) What are the similarities or differences between the best-case experiences?

Research Design

The methodological design employs a mixed-methods approach to research the phenomenology of facilitating the free exercise of religion employing the Success Case Method (SCM) of surveys and guided interviews capturing thick-description narratives. The surveys are quantitative, and the guided interviews provide narratives for qualitative analysis and coding, rendering this a mixed-method approach. The phenomenology studied is the experience and practice of facilitation of the free exercise of religion by members of the Chaplain Corps. The SCM's reliance upon verifiable thick-description narratives renders this a phenomenological study through guided interviews.

Nature of Methodology

The SCM approach to understanding the facilitation of the free exercise of religion is a mixed-method approach, which involves surveying the population and follow-up guided interviews of samples demonstrating preferred or ideal behaviors and successes. The population of the quantitative survey is the approximately 1,500 active-duty Army Chaplains responsible⁶ for facilitating the free exercise of religion for all uniformed service members, DA civilians, and their family members.⁷ The sample

⁶ Department of Defense, DODI 1304.28, *The Appointment and Service of Chaplains*, (Washington, DC: Department of Defense, 12 May 2021), 5.

⁷ Department of Defense, Department of Defense Instruction (DODI) 1300.17, *Religious Liberty in the Military Services*, (Washington, DC: Department of Defense, 01 September 2020).

population is quantitative survey participants volunteering for follow-up guided interviews, capturing thick-narrative descriptions for qualitative analysis. The narratives offer valid and compelling⁸ examples of best-case practices for the organization's good, reflecting action research's emphasis on the participation of a cross-section of the organization, empowering input, insight, and problem-solving to build trust and dialogue.⁹ Additionally, the narratives provide substantive content for analysis of leader qualities, behaviors, and attitudes that facilitate best-case successes.

Mixed Methods Design

Mixed method approaches collect quantitative and qualitative data to facilitate understanding an identified phenomenon or problem as general and specific,¹⁰ working to contextualize knowledge to the specific situation for diagnosis.¹¹ The underlying assumption is that this approach “yields additional insight beyond the information provided by either”¹² in isolation from the other. The quantitative survey of SCM provides a broad perspective of a phenomenon and the ability to rapidly stratify responses

⁸ Robert O. Brinkerhoff, *The Success Case Method: Find Out Quickly What's Working and What's Not* (San Francisco: Barrett-Koehler Publishers, INC, 2003), Chapter 7, Kindle.

⁹ William Passmore and Frank Friedlander, “An Action-Research Program for Increasing Employee Involvement in Problem Solving,” *Administrative Science Quarterly* 27, no. 3 (September 1982): 347. <https://www.jstor.org/stable/2392316>.

¹⁰ David Bargal, “Personal and Intellectual Influences Leading to Lewin's Paradigm of Action Research,” *Action Research* 4, no. 4 (2006): 373. <https://doi.org/10.1177/1476750306070101>.

¹¹ Kurt Lewin, “Action Research and Minority Problems,” *Journal of Social Issues* 2, no. 4 (November 1946): 36-37. <https://doi.org/10.1111/j.1540-4560.1946.tb02295.x>.

¹² John W. Creswell, and J. David Creswell, *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches* (San Francisco: Sage Publications, Inc., 2020), 23-24, Kindle.

according to the most and least preferred responses. The qualitative aspect captures experiences that are beneficial for understanding a pragmatic paradigm of organizational being and evolution. This pragmatic paradigm¹³ suggests that education and innovation have the potential to assist chaplains in navigating ontological tensions and successfully providing comprehensive religious support in a pluralistic setting while maintaining their religious integrity.

This study will commence with a quantitative survey invitation delivered via email to garner experiences, observations, and attitudes regarding facilitating the free exercise of religion. The survey (Appendix A) consists of a 15-question Likert-scale survey.¹⁴ The survey “simply lists the key behaviors, tasks, actions, tools...that we think are most associated with success.”¹⁵ The survey questions were created for this study after completing the impact model outlined in Table 3.1, with the first ten questions reflecting requirements outlined in paragraph 3.1 of DODI 1304.28 and the last five questions reflecting implied tasks in Army Regulation 165-1. The potential population for this study includes all active component Army Chaplains. All 1,478 active component Army Chaplains will receive an email requesting voluntary participation in a 15-question

¹³ John W. Creswell and Cheryl N. Poth, *Qualitative Inquiry and Research Design: Choosing Among Five Approaches*, 4th Edition (Los Angeles: Sage Publications, 2018), 29, Kindle. “... For the mixed methods researcher, pragmatism opens the door to multiple methods, different worldviews, and different assumptions, as well as different forms of data collection and analysis.”

¹⁴ Seung Youn Chyung et al., “Evidence-Based Survey Design: The Use of a Midpoint on the Likert Scale.” *Performance Improvement* 56, no. 10 (November/December 2017): 17. The researchers caution that the rising popularity of online surveys using Likert scales might lead respondents to select the midpoint as a dumping ground for unclear questions or unpopular issues. For this reason, the researcher focused on clearly defining terms or using terminology that was easily understood by the studied population.

¹⁵ Brinkerhoff, *Success*, Chapter 2.

survey with responses provided using a Likert scale. The survey is anticipated to take 10–15 minutes for each participant. Participants will offer primary demographic data without personally identifiable information or data that enables reidentification. The study will omit demographic data that potentially facilitates reidentification. The last question asks whether participants would like to participate in a follow-up interview regarding their experience and observations on facilitating the free exercise of religion. Samples will be drawn from this subpopulation to participate in the qualitative research phase.

The guided interviews focus on open-ended questions and appreciative inquiry, with the participants treated as co-researchers “telling their individual stories with increasing understanding and insight... Only the co-researchers’ experiences with the phenomenon are considered.”¹⁶ The research attempts this suspended judgment through what Husserl defines as “bracketed judgment,”¹⁷ with the acknowledgment that all interpretation is engagement with experience from the perspective of presuppositions informed by thought and prior experiences,¹⁸ rendering “Heidegger’s concept of engagement [sic] particularly salient in application to emerging qualitative methodologies, such as participatory action research.”¹⁹

¹⁶ Clark Moustakas, *Phenomenological Research Methods* (Thousand Oaks: Sage Publications, 1994), 18-19, Kindle.

¹⁷ Earl Husserl, *Ideas: General Introduction to Pure Phenomenology* (New York: Routledge, 2002), 58, Kindle.

¹⁸ Martin Heidegger, *Being and Time*, trans. John Macquarrie and Edward Robinson (New York: Harper and Row, 2001), 291, Kindle.

¹⁹ Lea Tufford and Paul Newman, “Bracketing in Qualitative Research,” *Qualitative Social Work* 1, no. 1 (2010): 83.

Appropriateness of the Methodology to the Research

The mixed-methods approach of SCM, with the quantitative survey and qualitative interview, follows Kurt Lewin's action research model of considering possibilities and practices by co-researchers after maximizing opportunities for participation from all echelons. The quantitative aspect of SCM facilitates broad surveying of a globally-postured population with rapid quantitative analysis²⁰ of the most-preferable and least-preferable responses. Implementing the quantitative approach in the first step of SCM provides statistical credibility and generalizability of responses to the survey responses if an appropriate sample of the identified population participates.²¹ This stratification of quantitative data and the participants' self-identifying openness to follow-up interviews generate ideal candidates for sampling via guided interviews.

Curious engagement with co-researchers seeks to increase participant transparency²² and understanding of practices and perspectives. The increased understanding gained from this engagement offers an increased understanding of the conditions, leadership traits, and behaviors, demonstrating an increased correlation with desired success. Schein posits that culture "is probably studied best by action-research

²⁰ Diane Saxon et al., "Collecting Data in the Information Age: Exploring Web-Based Survey Methods in Education Research." *Research in Education*, no. 69 (2003): 53. "Web-based surveys provide live access to the data, the ability to create many different reports, create complex selection criteria and present the data in various forms, lists, tables or charts."

²¹ "Sample Size Calculator," Creative Research Systems, accessed 15 April 2024, <https://www.surveysystems.com/sscalc.htm>.

²² Amy C. Edmondson, *The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth* (Hoboken: John Wiley and Sons, 2019), Chapter 7. Amy Edmondson refers to this as situational humility grounded in "a learning mindset, which blends humility and curiosity ... recogniz[ing] that there is always more to learn."

methods, that is, methods that get ‘insiders’ involved in the research and that work through attempts to ‘intervene.’”²³ Guided interviews likewise facilitate increased understanding and bracketing of biases and assumptions through uniformity and an emphasis on appreciative inquiry while reassuring participants of reidentification prevention.

Research Plan

Site, Population, and Sample

This phenomenological study observes a population experiencing the shared phenomenon of facilitating the free exercise of religion at geographic locations unique to each participant’s experience. The quantitative survey will be completed online, and participation in the qualitative guided interview will be conducted over Microsoft Teams. Participants will join from a location of their convenience.

The initial survey of active component Army Chaplains serves as the data for selecting interviewees based on their best (and worst) responses. The movement from survey to interview proceeds: 1—Analyze the survey responses to identify potential success, 2—Prepare for the interviews, 3—Conduct the success case interviews, and 4—Write case studies for the most interesting and noteworthy stories.²⁴

²³ Edgar H. Schein, “Organizational Culture,” *American Psychologist* 45, no. 2 (February 1990): 118.

²⁴ Brinkerhoff, *Success*, Chapter 6.

Selection and Description of Sample

Quantitative survey results will be sorted from most-desired (lowest scores) to least-desired behavior (highest scores) and attitudes, with the highest and lowest-scored responses forming the focal point for follow-up interviews. The stratification²⁵ of participants by rank further permits analysis of varying perspectives from newer and junior members to more experienced and senior members. Following the SCM approach requires multiple best-case groups,

you may have a more complex study purpose. If, for example, you wish to make estimates and conclusions about how widespread certain practices and success results are among certain subgroups of participants, then you will need to think through how to define and select success from among a subdivided set of survey responses.²⁶

SCM relies upon “documentation of the most poignant and informative stories.”²⁷ For this reason, the study focuses on identifying verifiable instances of the best and worst-case cases that provide thick narrative descriptions that fill the five buckets of SCM.²⁸ The interviews will be conducted using Microsoft Teams²⁹ to

²⁵ Allan G. Bluman, *Elementary Statistics: A Step by Step Approach* (Dubuque: Wm. C. Brown Publishers, 1992), 221. “A stratified sample is a sample obtained by dividing the population into subgroups, called strata, according to various homogenous characteristics and then selecting members from each stratum for the sample.”

²⁶ Brinkerhoff, *Success*, Chapter 6.

²⁷ Brinkerhoff, *Success*, Chapter 6.

²⁸ Creswell and Poth, *Qualitative Inquiry*, 84. Creswell and Poth posit that qualitative research culminates when the researcher accomplishes saturation, “usually considered to be reached when no new ideas are emerging—and whether the theory is elaborated in all of its complexity.” SCM, alternatively, focuses on the most compelling stories to support organizational success on a specific initiative or program.

²⁹ I will likely wear civilian clothing for interviews. The reason behind this is the power differential present within a hierarchical organization like the Army. Inversely, my presence as a senior chaplain might invite increased transparency from junior chaplains and potential defensiveness from senior chaplains for the same reasons.

accomplish interviews in a cost-effective and timely manner. At least six best cases and six worst cases should provide sufficient narrative descriptions to provide compelling results for telling the story.³⁰ Interview participants will be assigned pseudonyms. The participants will participate in a guided interview process (Appendix B) focusing on their experiences facilitating the free exercise of religion. Narratives are compelling for telling the stories to decision-makers. Once six interviews result in verifiable and compelling experiences and observations, interviews for that group cease due to saturation and SCM methodology.

Recruitment

Participants will be contacted via email (Appendix D), soliciting voluntary participation, outlining the purpose of the research, and advising participants of measures to prevent reidentification of participants. No monetary incentives will be offered to increase participation. The invitation includes an appeal to a shared professional commitment to facilitate the free exercise of religion. The invitation also highlights the potential positive outcomes of understanding the role of education and leadership in the profession's ability to improve the delivery of this core responsibility.

Selection and Description of Sample

The sample will come from an analysis of quantitative surveys looking for six best- and worst-case responses to the preferred behavior of those willing to participate in a follow-up guided interview. Phone calls and emails will facilitate the guided interview

³⁰ Brinkerhoff, *Success*, Chapter 7.

scheduling process with the sample. No additional incentives will be offered for participation in this aspect of the research.

Communication with Sample

The participants will communicate their willingness to participate in follow-up interviews in the online quantitative survey (Appendix A). Guided interview sessions will be scheduled by email or phone and conducted using Microsoft Teams.

Response Rate

The SCM grounds validity in the “documentation of the most poignant and informative stories”³¹ of relatively few participants. For this reason, only four to six best cases and two worst cases are required to describe the phenomenon with sufficient detail to permit qualitative analysis. In organizations larger than 400, Brinkerhoff³² recommends that the sample for potential interviews account for 10% of the population.³³ The quantitative questionnaire will be emailed to 1,478 people, with one reminder email 30 days later. The study design anticipates a 15% response rate over 90 days, with at least 10% of the population identifying as potential candidates for guided interviews.

³¹ Brinkerhoff, *Success*, Chapter 6.

³² Brinkerhoff, *Success*, Chapter 5.

³³ Pamela Arleck and Robert Settle, *The Survey Research Handbook: Guidelines and Strategies for Conducting a Survey*, 2nd Ed. (New York: McGraw-Hill, 1995), 153. The authors agree that a 10% sample provides sufficient grounding for the generalizability of findings to the identified population with the added upper limit of 1,000 regardless of the size of the population.

Quantitative Surveys – Data Collection

The SCM approach develops a survey following the development of an Impact Model describing success in the examined organization (table 3.1). The survey then examines tasks, behaviors, resources, and programs that “are most associated with success (derived from the impact model).”³⁴ Surveys are emailed or hosted online to expedite access, completion, and data compilation. The scaled responses provide a framework for sorting responses according to the impact model’s understanding of success to identify potential participants for guided interviews.³⁵ The quantitative survey presents 15 questions grouped into three sets of five, according to personal perceptions and understandings, organizational experience and understandings, and educational experiences.³⁶ Responses follow a Likert scale, facilitating rapid responses by respondents and quantitative analysis.

³⁴ Brinkerhoff, *Success*, chapter 2.

³⁵ Brinkerhoff, *Success*, chapter 2.

³⁶ Pamela L. Alreck and Robert B. Settle, *The Survey Research Handbook: Guidelines and Strategies for Conducting a Survey*, 2nd ed. (New York: McGraw-Hill, 1995), 153. “The most common way to group items is by topic... This would be an effective way to organize the items, providing that it appears logical or makes sense to the respondents.”

Table 3.1. Success Case Method Impact Model for Army Chaplain Facilitation of the Free Exercise of Religion³⁷

Capabilities	Critical Applications	Results	Branch Goals
Understanding how to provide comprehensive religious support for all authorized personnel in accordance with DODI 1304.28 Ability to integrate the free exercise of religion into Army systems and processes	Conduct formal and informal ad hoc queries of the religious/spiritual needs of the supported population. ³⁸	Accurate and updated religious demographics	Provide comprehensive religious/spiritual support for all authorized personnel in a manner that communicates belonging, dignity, and respect
	Develop and maintain a list of religious/spiritual/philosophical referral agencies on and off-post. ³⁹	Current referral list for supporting comprehensive religious support	
	Acquire and make available resources that support spiritual growth and resilience for the supported population. ^{40, 41}	Networked relationships between on and off-post religious/spiritual communities	Improve reported sense of belonging and support from low-density religious/spiritual tradition chaplains and authorized members of the supported population
	Advocate for equitable resourcing of all spiritual/religious groups (space, time, publications, material support). ⁴²	Appropriate and tangible representation and support for all religious/spiritual traditions	
	Conduct regular training on facilitating the free exercise of religion. ⁴³	Integration of intentional support for all religious/spiritual traditions within facilities, budgeting, and acquisition systems	

³⁷ Adapted Impact Model from Brinkerhoff, *Success*, Chapter 4, Figure 4.1.

³⁸ “805D-56A-6402 – Develop the Command Master Religious Program (CMRP),” *United States Army Central Army Registry*, accessed 11 May 2024, https://rdl.train.army.mil/catalog/#/search?search_terms=805d-56a. Part of developing the CMRP requires conducting an ad hoc query of the assigned organization to assess the religious traditions represented and the resource requirements for each tradition.

Appropriateness of the Technique

The procedures follow SCM's process of a short survey followed by guided interviews, which generally aligns with Creswell's suggestion that online surveys close after four weeks.⁴⁴ The online quantitative survey, hosted on Qualtrics and emailed invitations to the entire population, provides a perspective that is as diverse as possible. It provides rapid input and computational analysis through a Likert scale and facilitates the self-identification of volunteers for the guided interviews.

³⁹ Department of the Army, Army Regulation (AR) 165-1, *Army Chaplain Corps Activities* (Washington, DC: Department of the Army, 05 February 2024), 15. Garrison Chaplains will consider "the need to ensure religious leader diversity, broadening outreach to represent diver types of religious beliefs and practices represented on a military installation."

⁴⁰ AR 165-1, *Army Chaplain Corps Activities*, 7. Garrison Chaplains "develop and provide a coordinated effort that best addresses the religious diversity of the Soldiers and Families assigned to units and organizations as an installation with supervision of chapel programs and integrating UMTs from tenant organizations."

⁴¹ AR 165-1, *Army Chaplain Corps Activities*, 13. "All chaplains provide for the nurture and practice of religious beliefs, traditions, and customs in a pluralistic environment to strengthen the religious lives of Soldiers and their Families."

⁴² AR 165-1, *Army Chaplain Corps Activities*, 40. "Provisions will be made in the construction of the facility to accommodate the requirements of distinctive religious groups. The garrison chaplain or designee will manage the scheduling and use of all religious facilities for the [Senior Chaplain] to implement the CMRP." Furthermore, "Religious materials and items, regardless of origination or affiliation, that make positive statements about religious beliefs are authorized for display and distribution on military garrisons. Literature, videos, or other media presentations that express provoking, reproachful, or discriminatory statements about the beliefs and practices of other religious groups will not be purchased, distributed, or displayed on military garrisons or areas under the jurisdiction or control of the Army."

⁴³ AR 165-1, *Army Chaplain Corps Activities*, 6. "The SCCH will execute leadership responsibilities through the technical chain and in accordance with the Army Leader Development strategy and the [Chaplain Corps] leader development programs. This includes guiding and shaping installation-wide UMT training to ensure execution of [Chief of Chaplains] Training Guidance and advancement of command priorities. The [Senior Command Chaplain] will also serve as [a] coach and mentor to UMTs across the installation and may implement programs and initiatives aimed at individual and group development. [Senior Command Chaplains] will encourage and guide subordinate leaders to execute unit and organizational specific training and coaching programs within their respective organizations."

⁴⁴ Creswell and Creswell, *Research Design*, 176. The online survey will be open for 60-90 days to accommodate the Army's transient nature and the subsequent lack of online connectivity during periods of transition, training, or other operational activities.

Development of Reliability

The quantitative survey groups questions into three categories and relies upon participant understanding and engagement to provide responses that facilitate scoring from least-preferred to most-preferred perspectives and behaviors. Survey responses will be monitored for reasonable stability throughout data collection. The Likert scale includes a neutral midpoint and an option to skip the question, negating the possibility of participants using the neutral midpoint as a “dumping ground.”⁴⁵ The SCM emphasis on guided interviews for thick-narrative description likewise removes the requirement for detailed statistical analysis to determine the reliability of the quantitative survey, as the poles of responses within each of the three categories become the focal point for sample identification.

Qualitative Guided Interviews – Data Collection

Following the Impact Model (table 3.1) and Five Buckets⁴⁶ of SCM, guided interviews (Appendix B) use open-ended questions to invite thick descriptions and narrative accounts of the research phenomenon of facilitation of the free exercise of religion. The guided interviews seek to “let the Success Case interviews lead us, tell their stories freely, and be open to [learning] from them.”⁴⁷ The guided interviews seek to

⁴⁵ Seung Youn Chyung et al., “Evidence-Based Survey Design: The Use of a Midpoint on the Likert Scale,” *Performance Improvement* 56, no. 10 (NOV/DEC 2017): 17.

⁴⁶ Brinkerhoff, *Success*, Chapter 6.

⁴⁷ Brinkerhoff, *Success*, Chapter 2.

concurrently identify “supervisory support, incentives, [and] tools”⁴⁸ that facilitate individual and collective successes. To this end, the guided interviews follow targeted questions according to the five-bucket approach: what was used, what results were achieved, what good did it do, what helped, and what are your suggestions for others? The buckets form the saturation threshold as responses demonstrate that sufficient data was captured to “fill each bucket”⁴⁹ after asking spontaneous probing questions for each bucket.

Appropriateness of the Technique

Uwe Flick posits that mixed methods provide a distinctly pragmatic approach that supports the triangulation of perspectives through a substantially more reflective framework.⁵⁰ John and David Creswell similarly suggest that the strength of the mixed method comes from “mining the databases more by integrating them.”⁵¹ Quantitative and qualitative approaches each provide perspectives otherwise limited by selecting one over the other. Within SCM, the quantitative perspective provides a general understanding and identifies focal points for increased understanding through qualitative analysis of specific experiences of the researched phenomenon. Brinkerhoff’s five-buckets approach for the

⁴⁸ Brinkerhoff, *Success*, Chapter 2.

⁴⁹ Brinkerhoff, *Success*, Chapter 6.

⁵⁰ Uwe Flick, “Triangulation 2.0: Critical Reflections About Triangulation Facing Mixed Methods Research,” in *The Sage Handbook of Qualitative Research*, 6th Ed., ed. Norman K. Denzin et al. (Los Angeles: Sage Publishing, 2024), Chapter 42, Kindle.

⁵¹ John W. Creswell, and J. David Creswell, *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches* (San Francisco: Sage Publications, Inc., 2020), 235, Kindle.

guided interviews provides a threshold for specific understanding to facilitate saturation and generalizability.

Data Analysis

The study will run concurrent data analyses using Microsoft Excel for researcher-based analysis and Qualtrics and NVivo for software-based analysis. Microsoft Excel supports quantitative analysis of survey data, coding the guided interview transcripts, journal observations, reasoning, and decisions using color coding for themes and patterns. This color coding facilitates filtering and aggregation within Microsoft Excel. Qualtrics and NVivo support software and researcher-based analysis. Qualtrics provides web-based analysis tools for the quantitative survey, while NVivo facilitates predictive or in vivo coding and cross-analysis of multiple cases.⁵² The parallel analytical processes of Excel and analytical software facilitate an opportunity to examine bias and preconceived anticipatory results while accounting for concerns about computer software raising “problems of premature typification and premature closure in the analysis process.”⁵³

Role of the Researcher

I have been a member of the researched population for 26 years and the Army for 33 years, and I am currently a senior leader with professional and supervisory obligations in the U.S. Army. I will conduct all communication, including sending the participation

⁵² John W. Creswell and Cheryl N. Poth, *Qualitative Inquiry and Research Design: Choosing Among Five Approaches*, 4th Edition (Los Angeles: Sage Publications, 2018), 215, Kindle.

⁵³ Frederick Erickson, “A History of Qualitative Inquiry in Social and Educational Research,” in *The Sage Handbook of Qualitative Research*, 6th Ed., ed. Norman K. Denzin et al. (Los Angeles: Sage Publishing, 2024), Chapter 2, Kindle.

invitation email, creating and maintaining the online survey, collating and analyzing the survey data, interviewing participants, making observations of participants' behavior and demeanor, and conducting an analysis of guided interview responses through analog and digital approaches. The study focuses on asking open-ended questions during the guided interviews and attempts to bracket my own experience and perspective while engaging participants to gain fresh insight into the researched phenomenon from the participants' perspective.

Qualifications

I am an active component Army Chaplain with 33 years of service in uniform, 24 of which are as an Army Chaplain. I serve as a Colonel within the Army Chaplain Corps, an organization of approximately 1,500 commissioned officers, with 100 serving as Colonel and responsible for training, educating, and supervising subordinate members of the Chaplain Corps. I also served at the U.S. Army Institute of Religious Leadership as an instructor, task analyst, and doctrine author for the Chaplain Corps. I subsequently served as the force management officer for the Chaplain Corps within the Headquarters Department of the Army Staff. As a result, I am vested in the current and future relevance and viability of the Chaplain Corps' facilitation of the free exercise of religion in the Army. The goal of this research is to collect and record best-case practices of the researched phenomenon for the sake of capturing thick-description narratives and providing them as exemplars for the Chaplain Corps in a manner that articulates the leadership attributes and core values central to the organizational identity of the Chaplain Corps. While I am a senior member of the Chaplain Corps, care will be exercised to

create space for dialogue and psychological safety to support open and authentic sharing of personal experiences by participants.

Biases and Reidentification Measures

To control for researcher bias, the design requires journalling thought processes on coding the interview responses and sharing findings with fellow students. Because the interview responses have no personally identifiable information (pseudonyms assigned at the interview), results and coding will be shared with fellow students without concerns about reidentification. The guided interview questions will serve as a template for the interview, with the phrase “curious engagement” written at the top as a reminder to remain inquisitively engaged.

Each participant will receive a pseudonym and will be categorized into three general groups: evangelical Protestant, mainline Protestant, and low-density. These groupings provide sufficient aggregation to support the prevention of reidentification while still granting specific enough demographic identification for beneficial analysis. If demographic data increases,⁵⁴ the likelihood of reidentification, the study will aggregate findings to protect anonymity. For example, if a female chaplain (Colonel) responds with an interesting comment, the results will not specify whether the comment came from a

⁵⁴ Matthijs Koot et al., “A Probabilistic Perspective on Re-Identifiability.” *Mathematical Population Studies*, no. 20 (2013): 167. The researchers considered the impact of multiple variables on the ability to reidentify respondents, noting that increased demographic data increases this ability. For this reason, the discussion of respondents’ demographic data will be limited and cross-analyzed for potential reidentification concerns.

female Colonel because there are only two female Colonels.⁵⁵ in the active-duty Army Chaplain Corps.

Securing the Data

Per Title 32 of the U.S. Code, all data will be maintained for at least three years after completion of the research.⁵⁶ All data will be stored on a personal computer or an iCloud account. The personal computer uses biometric security for identity verification. The iCloud requires access from a known device using biometric security and two-factor verification. Per guidance from the Army Human Research Protection Office (AHRPO), no part of this research or work will utilize Government Furnished Equipment (GFE). Due to the minimal impact of participation in survey responses or interviews, participants may utilize GFE.

The study will receive approval and oversight from the Anderson University Institutional Review Board, the Army Human Research Protection Office, and the Army Survey Control Office to conduct this research. A copy of the Army Survey Approval number will be placed in red font on each survey and participation invitation communication (Appendices B and D).

Consent forms cannot reasonably be collected for all participants due to the online aspect of the survey. For this reason, a combined Institutional Review Board letter and Informed Consent explanation (Appendix C) is the first page of the online survey. The Informed Consent Form explains the purpose of the research, responsible disclosure

⁵⁵ This data is current as of February 20, 2023, based upon the roster provided by the Office of the Chief of Chaplains as part of granting access to the email addresses of current active-duty Army Chaplains.

⁵⁶ Protection of Human Subjects, US Code 32 (2024), §§ 219 et seq.

and reidentification mitigation measures, and any benefits associated with participation in the survey. The Informed Consent Form concludes with the following statement, “Please click on the following link to signify your consent and to participate in the survey.”

Participants are, therefore, not granted access to the survey until they choose to click on the link for the survey at the bottom of the Informed Consent Form.

Timeline

The online survey will be open for 60-90 days, with an invitation letter sent via email on the day it opens. On the 14th and 30th days, a reminder invitation will be emailed to all potential participants. When the survey closes, results will be downloaded for analysis and stratification of responses. It is anticipated that this process will take 14-30 days. Potential interview participants will be contacted over the next 14 days to schedule interviews. Interviews will be conducted over the next 30-60 days.

Transcription and qualitative coding of the interviews are anticipated to take 2-3 months, and writing and interpreting the results will take another 3-4 months.

Limitations

The research subjects are all active-duty Army Chaplains. As stated earlier, an invitation for the survey will be sent to 1,478 active-duty Army Chaplains. Selecting all 1,478 Active Component Chaplains casts the broadest possibility for diverse responses from active-duty chaplains.⁵⁷ It avoids the interviewer’s personal biases in seeking

⁵⁷ By sending the survey invitation to all active-duty chaplains, it avoids narrowing the study to one installation or a specific unit where supervisory influence or limited access prevents a broad assessment of the entire Chaplain Corps.

interviewees from known colleagues, supervisory chaplains steering the study toward a specific audience, or desires to impress an interviewer.⁵⁸

This research does not seek to assess the perspectives of commanders or the “customers” of religious support. This limits the ability to assess these two populations accurately, primarily focusing on the U.S. Army Chaplain Corps’ self-perceptions. This survey also omits religious affairs specialists’ perspectives and religious education directors. While it seems the scope of the research is extremely limited, the focus of the study requires analyzing the attitudes and perceptions of the persons responsible for providing or facilitating religious support, not the recipients of religious support or those who work alongside and in support of chaplains. The research likewise omits chaplains in the Army Reserve and National Guard. These should be surveyed in future research but as distinct groups with a recognition that access for surveying requires a modified approach.

Forecast of Chapter Four

Chapter four will use Brinkerhoff’s Success Case Method and thematic coding to assess shared observations, trends, concerns, and recommendations. The chapter will provide an individual analysis of each participant’s interview and an analysis of shared themes identified during qualitative coding.

⁵⁸ The desire to impress the researcher is a possibility for people who volunteer to participate in the interviews. However, there is just as likely a desire to skew the results as members of the Chaplain Corps seek to tell positive stories to defend the Chaplain Corps’ reputation. It is the hope of the study that the verifiable aspect of SCM will protect against these outliers.

CHAPTER FOUR

Findings

Introduction

This chapter contains the study data and analysis to understand the lived experiences of U.S. Army Chaplains facilitating the free exercise of religion. The participants voluntarily participated in the quantitative 15-question survey. From that population, twelve volunteers participated in guided interviews, providing descriptive narratives of their experiences, perceptions, assessments, and recommendations for supporting best practices across the Army Chaplain Corps. This study explored the lived experiences of Army Chaplains as recipients, facilitators, and witnesses of facilitated free exercise of religion predicated upon the premise that facilitating the free exercise of religion is a core requirement of the Army Chaplain Corps to support the Army mission and an assumption that proactive and comprehensive facilitation of the free exercise of religion is beneficial for individuals and teams preparing for, or conducting operations under austere and challenging conditions. Conversely, there is an assumption that inadequate facilitation of the free exercise of religion creates negative consequences for individuals and teams.

This phenomenological research utilized a mixed-methods approach following Robert Brinkerhoff's *Success Case Method: Find Out Quickly What's Working and*

*What's Not.*¹ The quantitative surveys provided a broad understanding of perceptions and practices from which participants demonstrating the most preferred and least preferred responses were identified for guided interviews with open-ended questions to solicit the research participants' lived experiences and recommendations, analyze the results, and distill the essence of the lived experience. This chapter includes the survey and interview participant recruitment process, data collection results, and guided interview analysis.

Presentation and Summary of the Data

Authorization and Oversight

Initially, the study was approved by the Anderson University Human Subjects Committee Institutional Review Board (IRB) on January 18, 2023 (Appendix E). On March 20, 2023, the Army Human Research Protection Office approved administrative support under the oversight of Anderson University IRB pending the inclusion of the Survey Control number in red font on the survey and participant invitation, removal of any military email addresses, and insertion of "The DOD will have access for inspection and copying any records documenting compliance or noncompliance with DODI 3216.02." on the Informed Consent Form (Appendix F). Following these changes to the invitation letter, survey, and Informed Consent Form, the Anderson University IRB approved the revisions on March 20, 2023 (Appendix G). These changes did not impact the research method but did provide increased protection for participants as members of the DOD.

¹ Robert O. Brinkerhoff, *The Success Case Method: Find Out Quickly What's Working and What's Not* (San Francisco: Barrett-Koehler Publishers, INC, 2003), Chapter 5, Kindle.

Survey Recruitment and Response Data

The study recruitment process consisted of an initial invitation letter (Appendix D) emailed to 1,478 active-duty Army Chaplains on March 27, 2023. A second invitation was sent to the same 1,478 active-duty chaplains (table 4.1) on May 02, 2023, with an update on response rates by rank (Captains 9%, Majors-13%, Lieutenant Colonels-15%, and Colonels-30%). After 60 days, the response rate was 23% (334), with 22% (319) including rank and 162 (11% of the total population or 48% of survey participants) volunteering for the guided interview. Responses developed a normative pattern that remained relatively consistent over the 60 days of data collection with negligible (less than 3% adjustments) in response distributions each week.² The median response time for the survey was 3:14, and the average was 6:26. The final response rate by rank was Captain 17% of 765, Major 22% of 433, Lieutenant Colonel 28% of 185, and Colonel 42% of 95. Demographic analysis of gender response rates revealed a slightly higher response rate for females, at 25% of the potential participants for females and 21% for males; 6% of respondents chose not to disclose their gender (table 4.2).

Table 4.1. Chaplain Corps Population

Population: 1,478					
Rank	Count	Percentage	Gender	Count	Percentage
Colonel	95	6.4%	Male	1,398	94.6%
Lieutenant Colonel	185	12.5%	Female	80	5.4%
Major	433	29.3%			
Captain	765	51.8%			

² Creswell and Creswell, *Research Design*, 176.

Table 4.2. Survey Response Demographics

Respondents: 334 Rate: 22.6%							
Rank	Count	% of Respondents	% of Population	Gender	Count	% of Respondents	% of Population
Colonel	40	12.0%	42.1%	Male	294	88.0%	21.0%
Lieutenant Colonel	52	15.6%	28.1%	Female	20	6.0%	25.0%
Major	95	28.4%	21.9%	Unknown	20	6.0%	1.4%
Captain	132	39.5%	17.3%				
Unknown	15	4.5%	1.0%				

Twelve guided interview participants were identified from the 162 volunteers (table 4.3) in October 2024, and all 12 guided interviews were conducted in October or November 2024 using Microsoft Teams. This process is outlined in the Guided Interview Participant Selection section below.

Table 4.3. Interview Volunteer Demographics

Interview Volunteers: 162					
Rank	Count	% of Volunteers	Gender	Count	% of Volunteers
Colonel	24	14.8%	Male	150	92.6%
Lieutenant Colonel	28	17.3%	Female	11	6.8%
Major	50	30.9%	Unknown	1	0.6%
Captain	59	36.4%			-
Unknown	1	0.6%	-	-	-

Survey Data Analysis

The survey was hosted on Qualtrics, and data was downloaded in Microsoft Excel format to analyze and remove identifying data. Following Brinkerhoff's Success Case Method, the surveys were used to identify respondents within the least and most preferred spectrum of responses. For this reason, although the sample size of 334 from a population of 1,478 provides a statistically reliable quantitative analysis sample, the survey data was not analyzed for generalizable patterns and observations. As noted in the response data above, the initial response rates by rank and gender were reviewed to assess the representation of ranks and genders within the sample. The 4% difference in gender response rates is insignificant but demonstrates appropriate representation of males and females.

Guided Interview Participant Selection

The quantitative survey (Appendix A) included 15 questions focused on personal perceptions and understandings, organizational experiences and understandings, and educational experiences. Each one of these categories included five behavioral questions associated with the Impact Model (table 3.1) and required capabilities outlined in paragraph 3-1 of DODI 1304.28. I calculated the averages for each group of questions, and each participant received a three-part score. I arranged the scores to identify those with the highest and lowest scores. Those with the highest and lowest scores were identified as potential candidates for guided interviews. The lowest scores represented the most preferred responses, while the highest represented the least preferred ones. I cross-referenced to ensure representation across rank, gender, and low-density faith groups. This served as a cross-matrix for selecting the 12 participants for interviews (table 4.4).

Table 4.4. Guided Interview Participants

Name	Rank ¹	Gender	Religious Tradition	Years of Service	Q1-Q5 Score	Q6-10 Score	Q11-15 Score	Rationale
Joshua	MAJ	Male	Low Density	10-20	.5.00	.1.00	.2.20	.Q1-5 (-)
Michael	CAP	Male	Evangelical Protestant	20-30	.2.80	.1.60	.1.40	.Q1-5 (-)
Amy	MAJ	Female	Low Density	10-20	.1.00	.1.40	.1.60	.Q1-5 (+)
Franklin	CPT	Male	Low Density	0-10	.1.00	.1.00	.1.00	.Q1-5 (+)
David	CPT	Male	Evangelical Protestant	0-10	.1.20	.3.00	.1.60	.Q6-10 (-)
Sam	MAJ	Male	Evangelical Protestant	10-20	.1.00	.3.80	.4.20	.Q6-10 (-)
James	COL	Male	Evangelical Protestant	30-40	.1.80	.1.00	.2.80	.Q6-10 (+)
Lionel	CPT	Male	Low Density	0-10	.1.00	.1.00	.3.40	.Q6-10 (+)
George	COL	Male	Mainline Protestant	30-40	.1.20	.2.20	.4.40	.Q11-15 (-)
Jonathan	LTC	Male	Evangelical Protestant	20-30	.1.60	.1.60	.3.20	.Q11-15 (-)
Lewis	LTC	Male	Evangelical Protestant	20-30	.2.40	.1.60	.1.00	.Q11-15 (+)
Kate	MAJ	Female	Mainline Protestant	10-20	.1.40	.1.20	.1.20	.Q11-15 (+)
334 Respondents' Averages					.1.30	.1.58	.2.02	

¹Rank Abbreviations: CPT–Captain, MAJ–Major, LTC–Lieutenant Colonel, COL–Colonel

The group ranks comprised four Captains, four Majors, two Lieutenant Colonels, and two Colonels. There were two females and ten males, four members of low-density faith groups, two members of mainline Protestant denominations, and six members of Evangelical Protestant faith groups. A brief demographic description precedes each participant's interview results..³

³ The demographic request did not include racial markers. Racial demographic information came from self-disclosure by participants or observations during the interviews.

Interview Process

Each interview candidate received an email requesting availability, willingness, and preferred date and time for an interview. All 12 potential participants agreed to and scheduled interviews over Microsoft Teams in virtual or telephonic modes. One interview (James) was rescheduled due to an emergency. The interview followed the Guided Interview Questions (Appendix B) with reflective listening offered as summations and clarifying questions throughout the interview process to invite participants to describe their experiences in as descriptive a manner as possible. At the beginning of each interview, the participants were reminded of the assignment of pseudonyms and other measures to prevent reidentification. In this process, all but one of the interviewees verbally granted permission to use their real names and locations. Despite this permission, pseudonyms were assigned. Participants were also provided a recitation of the survey questions and their responses as part of the interview introduction. When participants offered discussion outside the scope of the Guided Interview Questions, no efforts were made to redirect the participant. I used the same reflective summation behavior for any comments, regardless of correlation with the question asked.

Before each interview, I reviewed the Guided Interview Questions and the main research question before engaging in a minute of focused breathing while reflecting on Husserl's concept of "bracketed judgment."⁴ Throughout the interview, I also kept the term "curious engagement" written on paper or a dry-erase board in direct line of sight. During interviews, notes were taken on a blank copy of the Guided Interview Questions

⁴ Husserl, *Ideas*, 58.

to keep the interview focused and to capture initial thoughts and comments while self-assessing objectivity. After the interviews, transcripts were reviewed for consistency of researcher verbiage and assessment of the participant's ratio of talking compared to the interviewer.

Transcription

Transcription relied upon automatic transcription within Microsoft Teams. The transcripts were downloaded within 10–15 minutes of each interview, pseudonyms replaced real names, and transcriptions were reviewed and corrected to remove errant sentence breaks, verbal redundancies, and other transcription or grammatical errors like speech ticks and fillers.⁵ As part of the transcription process, standardized annotations were placed at questions and answers to reflect which question was asked or what question the answer was responding to, e.g., “Q.5a” was used to annotate responses to the fifth question concerning recommendations or suggestions for the Chaplain Corps to use at other locations. For ethical research reasons, all material before the verbal cues of starting and ending the interview was transcribed but deleted before analysis. In several instances, the “post-interview” portion of the transcription was substantive (more than three pages) but considered unethical for integration in the analysis due to the verbal cue that the interview was over. In two instances, the participants specifically requested to add additional information in the form of narrative descriptions of experiences. In these

⁵ Irving Seidman posits that researchers must protect the integrity of the content and the identities of participants and that grammatical editing or removal of filler language is permissible. Irving Seidman, *Interviewing as Qualitative Research*, 5th Ed. (New York: Teachers College Press, 2019) 129-130, Kindle.

instances, the material was included in the transcripts for analysis and attributed to the appropriate guided interview question.

Interview Data Analysis

Before reading the transcripts, I consulted the main research question, the guided interview questions, and the journal notes⁶ to acknowledge biases and practice bracketed judgment through curious engagement. “Curious engagement” was written at the top of each journal page as a reminder of a desire to suspend judgment and invite the participant as a co-researcher⁷ to speak to their experience of the researched phenomenon. Throughout the interviews, analysis, and coding, written and digital notes were maintained and reviewed for unconscious bias with specific self-inquiry regarding whether the analysis “prioritize[d] the participants’ data when analyzing interviews since I am studying their perceptions, not mine.”⁸ I also engaged in peer dialogue with a Ph.D. candidate at another university to support the achievement of “bracketed judgment”⁹ through informal peer review and accountability for biases.

⁶ Carl Auerbach and Louise Silverstein suggest using this technique of consolidating this information and then “keep[ing] this paper in front of you as you begin to read the transcript and think about selecting relevant text.” Carl F. Auerbach and Louise B. Silverstein, *Qualitative Data: An Introduction to Coding and Analysis* (New York: New York University Press, 2003), 44, Kindle.

⁷ Amy C. Edmondson, *The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth* (Hoboken: John Wiley and Sons, 2019), Chapter 7. Amy Edmondson refers to this as situational humility grounded in “a learning mindset, which blends humility and curiosity ... recogniz[ing] that there is always more to learn.”

⁸ Johnny Saldana, *The Coding Manual for Qualitative Researchers* (Los Angeles: Sage, 2021), 26, Kindle.

⁹ Husserl, *Ideas*, 58.

Coding Process

The coding process transpired during interviews, transcription, analysis, and writing. Understanding that “codes, categories, themes, and other qualitative data summations are actively constructed, formulated, created and revised by the researcher,”¹⁰ the process intentionally remained open while engaging in the same bracketed judgment and curious engagement utilized during the interviews.

A hard copy of the Guided Interview (Appendix B) facilitated taking notes during interviews, with codes in the margins and detailed notes in the paper’s body. The field notes (a journal) included ideation on codes. These were written during and immediately following the completion of the interviews. Throughout the transcription process, notes on recurring topics or highlighted emphases of participants were listed in the field journal.

The initial codes were developed by reading through the transcripts multiple times.¹¹ The transcripts were read in isolation to focus on the individual experiences and clusters to focus on the shared experiences across participants. Codes applied during each review iteration led to potential groupings or categories of codes.¹² The iterative nature of the coding process provided opportunities to review the transcripts from various

¹⁰ Saldana, *Coding Manual*, 7.

¹¹ “Coding is a cyclical act. Rarely is the first pass or first cycle of coding data perfectly attempted. The second cycle (and possibly the third and fourth, etc.) of recoding further manages, filters, highlights, and focuses the salient features of the qualitative data record for generating categories, themes, and concepts, grasping meaning, and/or building theory.” Saldano, *Coding Manual*, 12.

¹² “Synthesis combines different things in order to form a new whole, and it is the primary heuristic for transitioning from coding to categorizing (and from categorizing to other analytic synthesis).” Saldano, *Coding Manual*, 13.

perspectives to capture the essence of essential elements of the lived experiences of individuals while actively looking for connections through categories.

Microsoft Word was the initial coding platform. I also purchased NVivo and used the manual coding tools within the software. The manual coding of the software proved beneficial for coding and categorizing, with the ability to read, highlight, and create manual codes for use across transcripts. Coding in this manner led to Shared Themes.¹³

Shared Themes

The Shared Themes are categorized or *in vivo* codes that emerged from analysis over several weeks of reading, highlighting, grouping, and reflecting in an iterative fashion (table 4.5). Codes were assigned, and these codes (words or phrases) were grouped based on similarities or connections. This approach aligns with the *Success Case Method's* assertion that “in some instances, especially where SC Method was used as an informal tool to further develop a program, all that is needed is to capture the essence of the success cases that were discovered.”¹⁴

¹³ Categories and themes are used relatively interchangeably in qualitative coding literature with Carl Auerbach offering that “A theme is an implicit topic that organizes a group of repeating ideas.” While I coded by categories, I chose to use the term theme because these were repeating ideas across the interviews. Auerbach, *Qualitative*, 21.

¹⁴ Brinkerhoff, *Success*, Chapter 7.

Table 4.5. Shared Theme Codes

Category	Codes
Education and Training	Pre-Chaplaincy Endorsing Agents Chaplain School Courses Installation/Unit Inconsistency Non-Pragmatic
Tension	Personal Faith and Professional Role Within Christianity Across Religious Groups Contradictions Between Endorsing Agents and Army
Leadership and Influence	Senior Leader Modeling (+/-) Command Support/Integration Rank Dynamics Affecting Religious Support Discussions
Approaches to Support	Focus on Listening and Support Hospitality Build Trust Through Authentic Engagement Minimalist or Proactive
Systemic Issues	Resource Allocation Doctrinal Alignment Standardized Processes Command Integration
Transformation of Understanding	Personal Growth Transforming Initial Resistance to support Developing Broader Perspectives Iterative Requirement

Results

Following are summarized participant responses and a collated section of commonly shared coded responses. Wherever possible, the results attempt to avoid summation in favor of narrative quotes. Some participants provided brief responses with multiple follow-up questions for clarification. These results tend to read as summations with intermittent quotes.

Participant 1 – Joshua

Joshua is a White male Army chaplain representing a low-density¹⁵ faith group and serving as a Major with 10–20 years of uniformed service. Joshua serves inside the Continental United States. The interview was conducted telephonically through Microsoft Teams.¹⁶ I selected Joshua because he provided the least preferred response for all five of the first five questions. Within minutes of starting the interview, it was apparent that he answered the questions inversely. We reviewed the five questions verbally, and his score shifted from 5.00 to 1.20. I preserved Joshua's interview because it marked my seventh participant and his experiences carried the same legitimacy as those of other interviewees.

Joshua's Experience of Free Exercise Facilitation

Joshua's approach to religious free exercise reveals a thoughtful navigation of personal faith and professional duty. While firmly grounded in his monotheistic tradition, he demonstrates an ability to separate philosophical differences from personal interactions, noting "there is a disconnect between how I see a philosophy and then how I see a person."

His practice exemplifies this balance - he recently "recommended somebody to a Catholic priest because we were in counseling, and that was their faith" while continuing to provide care himself. Joshua focuses on finding common ground, believing discussions

¹⁵ "Low-density" refers to faith groups' minority representation within the Army Chaplain Corps population. Examples of low-density include Islamic, Jewish, Hindu, Buddhist, Church of Jesus Christ of Latter-day Saints, Universalist Unitarians, and Greek or Eastern Orthodox traditions.

¹⁶ All quotes from this section come from Interview with Joshua, October 31, 2024.

“should be about how we’re all the same...what it means to be a responsible citizen.” He maintains cordiality and openness to deep conversations across faith boundaries, hoping to present “a face of monotheism...in a thoughtful way that gives them an opportunity to interact.” This demonstrated his ability to provide “ethical, moral leadership” in the counseling room while referring them to a religious leader outside his faith tradition - something he acknowledges “contradicts to some extent my own faith.”

Joshua views other faith traditions as “on a path to God,” though he acknowledges experiencing internal tension with Pagan worship. He resolves this by viewing himself as “just a conduit for the space and time” rather than personally endorsing practices. He emphasizes, “It’s not my building. The government has entrusted me with the operations of the building.” While wrestling with the traditional chaplain mission of “bringing God to soldiers and soldiers to God,” particularly regarding Pagans, he reframes his role as a “conduit” rather than a direct provider, emphasizing that he is facilitating access to government space and resources,

My rationale was, yes, I would do it. But I’m just going to speak for my own internal process and not as a statement of anything else. I like the idea of freedom of religion. I do. But I’m not really comfortable with Pagan worship. I support it. I, you know, for the free exercise, space, time, and everything. Basically, I’m just giving them the space and time. Or rather, I’m just a conduit for space and time. I’m not really giving them anything. It’s not my building. The government has entrusted me with the operations of the building, but it’s not mine. I’m not giving them anything, just facilitating it. I am less than comfortable doing it, but externally, there would be no difference in my support.

Within this frame, he recognizes that he is not endorsing a faith that contradicts his own by fulfilling the role of providing access to space, materials, and personal support.

Joshua imagines his approach impacts others primarily through his presentation as a thoughtful representative of monotheism who remains approachable despite theological differences. He hopes that by being “a smiling face on the other side of the equation,” he can have “some kind of positive impact on them.” He mentions explicitly being “very cordial” in all interactions. He hopes this might create opportunities for deeper engagement, saying, “It’s just nice there’s a smile who’s clearly in a monotheistic faith tradition... that they might find me somebody who they can have a conversation with.” He notes that he is “capable of having many deep conversations” and references having engaged with a Pagan soldier, suggesting he sees his openness to dialogue as part of his impact.

Joshua believes that by maintaining this cordial, approachable presence while being openly monotheistic, he creates opportunities for others to “interact with a monotheist, and ask questions of a monotheist, and have deep conversations with a monotheist, which further spreads the message of monotheism.” While he acknowledges his discomfort with some traditions, he emphasizes that this does not affect his interactions with individuals, suggesting he sees his ability to separate philosophical differences from personal interactions as key to his positive impact.

Joshua sees his approach as supporting the Chaplain Corps’ mission in several ways, noting that spirituality means being “connected to something greater than yourself.” Chaplains fulfill their role in soldiers’ holistic health by supporting this connection across faiths.

Joshua believes his strength in separating philosophical differences from personal interactions serves the Corps. He can “present a face of monotheism... in a thoughtful

way” that enables deeper interfaith dialogue. His focus on unity within diversity helps fulfill the Corps’ broader mission, emphasizing how diverse faiths “can come together in a united vision of what it means to be a human...and to be an American.”

Participant 2 – Michael

Michael is a White male Army chaplain representing an Evangelical Protestant group and serving as a Captain with 20–30 years of uniformed service, the first 10–15 being an enlisted soldier. Michael serves inside the Continental United States. I selected Michael because he scored second highest for the first five questions. The interview was conducted virtually with audio-visual capacity through Microsoft Teams.¹⁷

Michael’s Experience of Free Exercise Facilitation

Michael’s experience with religious free exercise primarily centers around religious accommodation processes, where he experiences a notable tension between supporting soldiers’ rights and his role as an assessor.

Well, let’s just talk about religious accommodation. I’m fully committed, and I will go to extremes to support soldiers when it comes to religious accommodations. I just find it slightly odd, even in how the regulations, the Army regulations, it is written that a Christian chaplain, although, again, I’m fully in support of him, but a Christian chaplain is called upon to judge the sincerity of those Muslims or Hindus who are seeking a religious accommodation. The packet we create is often thrust on the chaplain, and although we push back to, you know, whatever Echelon that we are working at, the chaplain has one memo that speaks to the sincerity of the soldier’s faith. And again, I just find that to be a stretch that, let’s just say again, a Christian who is fervent in their beliefs would judge the sincerity of an Islamic soldier. Or recently. I was asked to interview a soldier of the Rastafarian faith. Again, I strongly support his, you know, right to request that. But again, it’s just off-putting that I would be asked to judge his

¹⁷ All quotes from this section come from Interview with Michael, November 05, 2024.

sincerity. And so that just kind of contradicts; I'm being asked to bend on my faith requirements in support of his.

While he's "fully committed" and will "go to extremes to support soldiers when it comes to religious accommodations," he finds it "slightly odd" that a Christian chaplain is called upon to judge the sincerity of Muslims, Hindus, or other faiths. He notes that in his seven years as a chaplain, "90% of all those that I've supported... perhaps 95% has been anything other than Christian."

The challenge lies in being asked to "bend on my faith requirements in support of his." He finds it "contradictory that a Christian would be asked to judge the sincerity of another soldier's Faith Group," though he has recommended approval of nearly all requests unless someone is "actively trying to circumvent the system." This creates what he calls a "rock and the hard place, Catch 22" situation where he "absolutely wanted to support them" while finding it "runs afoul of who I am as a Christian."

The complexity deepens when chaplains must advocate for soldiers of different faiths before commanders. As Michael explains, "Now you know the chaplain, let's just say of a different faith group is defending a soldier of a different faith group... before a commander." Recent policy changes requiring field-grade officers to conduct interviews have added "another layer of problems," particularly when units are geographically separated.

Regarding religious materials, Michael takes a measured approach. While he will not "actively order... a plethora of denominations across the Army," he makes whatever materials are sent to him available. He believes "the onus is on the individual and the soldier to requisition that," suggesting a demographic analysis could determine what materials to stock while remaining responsive to individual requests.

Michael offers several specific recommendations to improve these processes. He suggests establishing “points of contact for faith groups that we could reach out to” for consultation via “Zoom or teams or any email.” He advocates for standardized resources, noting that “chaplains have taken on their own accord to create products” that are informally shared. He recommends developing “a regulation, even some chaplain regulation, could provide the steps, verbatim, even a flow chart” and establishing “a repository for the way these things are done.”

Michael emphasizes the need for updated religious resources, expressing enthusiasm for republishing the Chaplain Corps’ handbook on world religions. He notes the challenge of creating interfaith calendars and religious information, saying, “I’m amazed that’s not a thing.” These challenges are “magnified especially for those with no prior service... the brand new chaplains.” He concludes that “we’re 249 years into the ball game, and we’re still our own worst enemy,” emphasizing the need for better institutional support and resources.

Participant 3 – Amy

Amy is a Black female Army chaplain representing a low-density faith group. She is a Major with 10–20 years of uniformed service. Amy serves inside the Continental United States. I selected Amy because she scored the lowest for the first five questions. The interview was conducted telephonically through Microsoft Teams.¹⁸

¹⁸ All quotes from this section come from Interview with Amy, November 05, 2024.

Amy's Experience of Free Exercise Facilitation

Amy describes three instances of facilitating religious support. One involves creating a resources table, another recognizes a planning and resource gap, and the third navigates a unique request and finds a way to balance limited needs and safety concerns with an individual's request for religious support.

In the first instance, Amy describes creating an intentionally welcoming office space by including religious materials for all faith backgrounds, including atheists. She contrasts this with other chaplain offices that often had limited or selective materials. Her approach involved ensuring there was "something for everyone" in the unit, including books, literature, and religious pendants.

I'm going to put my memory cap on. What I remember was just being very intentional about even the little things that don't seemingly, don't mean that much, but they really do. I think I showed you the example of just making the office a welcoming space for all backgrounds as much as possible. At least for those that are in our unit, I would scrub that list [unit personnel roster] and see and make sure there was something for everyone if possible in the office. Even atheists. And I did not have a lot, but I did have an atheist textbook in there. Apparently, one of ours was a First Lieutenant. He saw that and was excited to see that book. So, apparently it was good. So I mean that you know what it did was it makes them more willing to come to you and trust you as someone who just genuinely cares about them, not someone who's just there to sway them into their own faith...In other offices, I would always see the same books, and there would be an absence or silence on others. There was just standard material, and I would always notice an absence or silence on others. Not everyone, I'll be honest. But there were a lot, enough to kind of when I walk in, I am like, oh, OK, you know, I want to walk in and be like, oh, well, there is a Quran. There are some Jewish reading materials. There's Bhagavata Gita, there's. I mean, you name it, right? The Theravada. I can't think of all of them right now, but even some earth-based faith groups, books, or literature. We have our, you know, those pendants. I mean, it's a small thing. Those pendants, you know, we have them, and we can order. I think they have five for the five major world religions. But we can all go to Amazon and get like the hammer of Thor. Or, you know, I mean, it's just, I know it sounds small, but it really does mean a lot when someone comes to the office and sees something they can connect to.

Amy also describes a challenging situation during a field exercise that highlighted issues with religious accommodation. The unit moved an exercise that fell on Easter but rescheduled during Ramadan without proper planning for fasting Muslim soldiers. This led to several problems:

I just thought of an example. I was when I was preparing for the interview, and then you would ask me to think about good practices. A lot of not-so-good practices popped up. So, for example. We had a field exercise, and it was on Easter, so of course, the command and everyone decided to move it, but the date they moved it to fell on Ramadan, and I think I might have shared this with you. Long story short, there wasn't a plan in place for soldiers who were fasting. To either come out of the field when they break their fast or have lighter duties. Or it just wasn't well organized. I mean, not to say you could never do a field exercise in Ramadan, but you know, at least you were intentional about accommodating those soldiers, and it wasn't. We had soldiers passing out. We had soldiers running out of Meals Ready to Eat (MREs) – Halal MREs at Ramadan. It was horrible... That's just one example. I think we can just be more cognizant.

Amy presents this as an example of “what not to do” and suggests better planning and intentionality in scheduling operations around religious observances. Simultaneously, it is an example of a chaplain assessing an issue, taking action, and making notes about future religious accommodation plans.

The last example involved a unique support request where military necessity and safety concerns factored into the accommodation process.

I'll leave you with one story; I would say it even pushed my envelope. We had another field exercise, and I had a soldier come to me. He said, “Chaplain, I'm a Satanist, and this exercise falls on one of my holy days.” Now, this is bizarre because I'd never buy candles for the field. I don't, but for some reason, before going to that field exercise, I just grabbed one of those candles where you can cover it up when it's time to extinguish it. It's in a glass jar, and I grabbed it and brought it out there with me. He wanted to know if he could build a bonfire. This is like the bonfire exercise in *Turbulence*. And so I went to the command and knew the bonfire was impractical. But I went to the safety office. And I went to the commander. And you know, what can we do? How can we accommodate this? So I said, well, OK, we can't have a bonfire, that's not practical. The commander agreed, “We're in the woods. The bonfire, yadda yadda, but what about a candle?” Suddenly, I remembered that I brought the candle in the glass

jar. And so I went back to him and said, you know, I spoke with our safety officer and the commander. I said the best we can do for you to observe your holy day is a candle. How would this work? And I handed him the candle, and I kid you not, he was so thrilled. His face was. It showed it all, and I thought that was for me. It was kind of, you know, amazing because I didn't have the date on my calendar to even know about it, and I still accommodated him in the best way I could.

Amy received positive feedback from soldiers and experienced support from commanders and other unit leaders, demonstrating appreciation for the approach and support for facilitating the free exercise of religion for the good of individual and corporate well-being.

I know that he trusted me when he sent his soldiers to me, that he trusted that I was going to take care of them as someone who cares about them, not necessarily. As someone who, like we said before, wanted to sway them to any faith or another. I think being an atheist in the military, I think he felt like there was. We had talked about it like sometimes he doesn't. He's not honest about his background. He'll just kind of gloss over it because there's some sense of shunning. And so for him to find that in my office meant a lot—it really did. It was like another young man who. He was the son of a chaplain assistant, and he saw that I had a book. It was Earth-based. I can't remember which one. Earth-based, and he just gravitated to the shelf, and he saw, he said, I never thought I would see this in a chaplain's office. And it just you can tell like they light up and they always come back, you know they come back and they want to talk to you and it's not about. They just genuinely they know that you care about them as a person, if that makes sense?...My commanders and executive officers were always really supportive of whatever we needed for the office. They were 100% on board. Yeah. So, there was never an obstacle for my units at all.

Amy recommends learning to own one's theological discomfort and creating a welcoming environment where dialogue is encouraged to build understanding while empowering authentic personhood.

Participant 4 – Franklin

Franklin is a White male Army chaplain representing a low-density faith group and serving as a Captain with 0–10 years of uniformed service. Franklin serves inside the Continental United States but is deployed to Europe. I selected Franklin because he

scored the lowest for the first five questions. The interview was conducted telephonically through Microsoft Teams..¹⁹

Franklin's Experience of Free Exercise Facilitation

Franklin describes his experience as consistently positive, explicitly mentioning garrison chaplain support in ensuring all services are available.

Practice is supported. Free exercise of religion. Anything that I've seen. Honestly, I've seen pretty decent support. Obviously, the Garrison chaplain makes sure all the services are available whenever there's no chaplain of a particular faith group. They're pretty good at finding, contracting, or finding a Distinctive Religious Group Leader (DRGL). I haven't seen any issues from the unit level either. People, even during the crazy COVID, you know, we were doing 100 exceptions. You know, the commanders are very supportive. You know that. And when I've tried to do a religious accommodation for a beard or something to that effect, I've never gotten any pushback. So, generally, it's been very supportive. I've been very, I don't know if I've just lucked out and had very good units or what, but they've been pretty good at supporting religion.

While Franklin perceives consistently positive support, he views COVID-19 as a potential disruptor that increased awareness for and support of religious accommodation.

Before the COVID fiasco, I think the awareness of religious accommodations, in particular, was not that great. And now that we have an actual process in place and commanders are very aware of it now, I think support has increased. I don't think I ever experienced anything negative. I've just seen more of an awareness of what commanders see now. He [the commander] gets [understands] a COVID exemption request.

When Franklin emphasized commanders' support for religious accommodation, I asked whether he perceived a similar commitment within the Chaplain Corps.

Oh, that's a good question. I see a pretty decent commitment with both. I mean, obviously, internally, we hear some of the complaints. Accommodation isn't the easiest thing in the world. But at the same time, chaplains do seem to be fair. You know, they have a strong desire to complete those accommodations. I think the

¹⁹ All quotes from this section come from Interview with Franklin, October 28, 2024.

biggest struggle that I've seen with other chaplains is when they disagree with a religious accommodation. You know, they kind of have an internal struggle. I really want to help this guy. Is this guy sincere? I think that's, you know, if there was something to identify, I think that's where it is. But generally speaking, they don't push back on the soldier as much.

Noting that chaplains generally support religious accommodations, I asked about tools, systems, or processes (SCM Bucket 4) that he found beneficial.

As far as religious accommodations, I think it's just the whole process. Once they saw it in 2019, I think they came out with an actual system. Whereas before, we were all kind of, you know, how do you do religious accommodation? I don't know. You type up a memo, and hopefully, the commander accepts that. But now there's an actual step-by-step process. No kidding. You can inform your commanders, S1, etcetera, on the routing procedures. And it's a natural system, and depending on the combination, this is how long it should take and where it goes, and you know. And so that's been very helpful. I think the biggest struggle is when somebody needs an exception to AR 165-1 for a beard longer than two inches because it seems we have one right now. We made it and sent it up. I can't remember who they sent it up to, but we're just waiting, and it seems like that's where it gets stuck. Those are the exceptions, but aside from that, I haven't seen issues. Yeah, but it's just the whole procedure being in place where we can actually work. I have a PowerPoint that I can go back to, and I can work on it step by step. It's fantastic.

As we discussed recommendations (SCM Bucket 5), he mentioned the strength of garrisons garnering support from off-post or looking at internal capabilities to provide diverse faith-specific services for Jewish, Islamic, and Buddhist personnel. Because Franklin represents a low-density faith group, I asked about the dialogue between him and the garrison relative to understanding and supporting his faith group's practices and needs on the installation.

So, in South Korea, we actually had a [sic] service on the post. They were very supportive. They actually had two. And you know, here in South Carolina, there's probably, I would have to go count them. There are probably ten different congregations that support and have military, and you know, they're [sic], but none are on post. And so, that's the struggle. We should have worship on the post. It was. We have a scripture study on Tuesdays. And that's not the garrison's fault because [faith group removed] are stuck between the civilian and Garrison leadership. So, we are trying to fill those up for the Garrison. We would have one

on post, so I don't fault the Garrison. It's just a matter of the local [sic] being willing to put a congregation on post. So there's an on-post worship, but I haven't had any pushback or anything. The chaplain here is very supportive of us.

As we concluded the interview, I asked him if there was anything vital the Chaplain Corps should consider regarding the facilitation of free exercise because his initial answer demonstrated a positive example but lacked a recommendation. He emphasized comfort with operating in a pluralistic environment.

I think that we should continue stressing the environment of pluralism because, well, most chaplains seem to handle that pretty decently. I have run into some chaplains who just cannot handle, you know, having religious conversations with people that are outside their, you know, belief structure. In the Army, I mean, it's pretty much impossible not to run as soldiers who believe differently than you, you know. So you have to be willing not to judge them and accept them for their, you know, I'm a Christian, and you're Pagan. I have to be OK with that. I don't have to agree with their practices per se, but I think, you know, allowing them to practice in their way, honoring them, and helping them in their version of spirituality is a really important skill for a chaplain to learn, especially some of these new chaplains. They need to learn that real quick. That's super important in this environment.

Participant 5 – David

David is a White male Army chaplain representing an evangelical Protestant faith group and serving as a Captain with 0–10 years of uniformed service. David serves inside the Continental United States. I selected David because he scored the second highest for the second five questions. The interview was conducted telephonically through Microsoft Teams.²⁰

²⁰ All quotes from this section come from Interview with David, October 28, 2024.

David's Experience of Free Exercise Facilitation

When asked about his experience facilitating the free exercise of religion, David outlines his commitment to supporting religious accommodation requests for all service members. He also shares frustrations regarding his perception of the Chaplain Corps' lack of support for his request.

I would tell you that at every installation, I have assisted soldiers interested in seeking assistance from the earliest time...I have assisted atheists, I've assisted Sikhs. I've assisted Muslims. I have assisted Norse pagans. I've assisted Jewish soldiers. All of those things I am a conservative Protestant Christian. And so I don't, from a theological perspective, I don't identify theologically with any of those that I just mentioned. And yet I knew when I raised my hand at [sic] in 2013 and came on active duty. I knew that part of what I was doing was a commitment not only to the Constitution...But I knew that part of what I was doing was a commitment to the free exercise of religion. I don't have that commitment if I'm in a church. I can preach exactly what my church believes or what I believe. If I, you know, if I believe what my church believes, right? But I knew that I was committed to that. At each of those installations, this is the answer to your larger question: I have seen interest in helping these soldiers validate and obtain their religious accommodation. I saw the process work, so that's a good thing, right? I've seen Jewish people be able to wear kippahs and grow beards. I've seen Muslims have special accommodations for Ramadan. I've seen Sikhs who can wear a turban and other things. Does it work? It's a good thing when it works and when it's practiced. Now, the flip side of that. When I was in Japan from 2019 to 2020, COVID-19 hit, and there was this little thing called a new vaccine that was formulated on new grounds. And I'm not going to go down the rabbit hole. But I will just say it was not the traditional way. I am not an anti vaxxer. I've had every vaccination the Army thought I should have throughout my career. And I'm current on everything except for COVID-19, right? So, but it was a new type of vaccination. It was not the same dead vaccine or dead piece particle of the disease that they injected into your body. They used the mRNA. You know, technology and for people like me who come from a holiness tradition, who really believe that we take very seriously the idea of what we put into our bodies. There are multiple things that I don't put into my body. You know alcohol, tobacco, or just to name a few, right? And I come from that tradition. So, for those of us who felt that way, who said whoa, wait a minute. We need to study this a little bit more. I'm not sure that this is something that I want in my body. That is a religious conviction...Conversely, I also believe you had senior leaders in our corps; back to your question of those who are not aspiring to advocate, who did nothing to aid the cause of free exercise, even if they had no personal religious conviction or issues themselves, which they don't have to. They should have recognized the

nature of the free exercise of religion and what it is, and there should have been greater support.

David discussed the negative impacts he perceived on his career and membership within the Chaplain Corps, from double-slotting his replacement and sidelining him to canceling his assignment orders and preventing him from training or traveling as part of his official duties with his assigned unit. I asked him how he thinks this impacts (SCM Bucket 3) the Chaplain Corps' ability to fulfill its assigned mission.

Sir, we do a lot of things. We, you know, we nurture the living. We honor the dead. We, you know, preach, counsel, marry, and do many things right. Those things are not the core of who we are and what we do because the core of who we are has been challenged in the US Supreme Court for decades. There have been people who have been trying to get rid of chaplains for decades and say that it is inappropriate because of the separation of church and state and that it is inappropriate for the state to fund chaplaincy, right? That has been challenged in law, and the only reason our corps exists today is because the Supreme Court of the United States has argued that we are not, I don't want to say that we are non-partisan, but we guarantee free exercise even to those who do not believe the way we believe. We do not proselytize. And you know that you're a Colonel. I'm not teaching you anything you don't know. But we exist because the Supreme Court has said it is not against the separation of church and state because they are not establishing a religion. They are protecting free access to religion. So when this issue happened, you ask the question, how does it hurt us or help us? It hurt us completely because when this happened, the corps did not say anything, and I would say the corps did not stand up for me or other chaplains, but more importantly, the corps did not stand up for soldiers either. There were soldiers that we chaplains advocated for, but there was no support from the Chaplain Corps. Commands were empowered to run over the rights of soldiers, and I think it has led, in part, there's a lot of issues, but in part, it has led to the recruiting crisis we're currently seeing.

When asked about recommendations (SCM Bucket 5), David emphasized the Chaplain Corps' role in advocating for religious freedom as a critical recommendation for the Corps to own and champion.

And, if I, as a chaplain, Sir, if I am losing my free exercise right as somebody who pins a cross on my chest every day if I'm losing my free exercise rights, what does that tell the soldiers about what they have the right to believe or to practice, or what does that tell them about the power that we have to advocate for them in

the future? So I think it has absolutely diminished us as a corps. And I have long said that if one loses free exercise, we are one short step away from all losing free exercise.

Participant 6 – Sam

Sam is a Black male Army chaplain representing an evangelical Protestant faith group. He is a Major with 10–20 years of uniformed service inside the Continental United States. I selected Sam because he scored the highest on the second five questions. The interview was conducted telephonically through Microsoft Teams.²¹

Sam's Experience of Free Exercise Facilitation

When asked about his experience of situations where he observed a reluctance to support the free exercise of religion, Sam provided examples of familiarity-driven support and hierarchical or dominant group favor.

Suppose, if you will, cultural expressions of Christianity, even Christianity where you know, groups are suppressed because they may not have had those same cultural styles of worship. And so you know, you would see that readily, and you would also see the lack of educating soldiers. Then also from other chaplains in regard to getting support for the exercises of their religion or if you want to say their cultural styles of worship so that, for me, I'll give you an example of it. For instance, you know you had soldiers who may be of different faith groups. And even some that are different, if you want to say in terms of total religions or different denominations from a Christian perspective, may need religious accommodation. You'll find a lot of disparity in treatment, with chaplains giving urgency to interviewing them or even consulting with the company commander when it's more accepted or something they know about. Something that chaplains knew about or were educated on, they had a propensity to, you know, go forward and do more, do more work, and support that person's process to get their religious accommodations.

I mean, it looks like we have a systemic disparity of treatment based on the religious group that you come from. I'm [sic], so I guess I'll be slightly biased here, but I'll remove the bias. But just looking at the reality of what I faced when I pastored the Gospel service for almost three years at [sic]. I will tell you, even though we were leading in Chapel Tithes and Offerings (CTOF) and we definitely

²¹ All quotes from this section come from Interview with Sam, November 02, 2024.

led in volunteerism for [sic], we were treated differently. We were treated with not the same level of regard to the point where you know me as a captain, you know, I had to, you know, ask the question to those that outrank me at the Chapel Program Budget Advisory Council (CPBAC) meeting while trying to gain support for the service for faulty equipment and faulty facilities. While you know my counterparts, you know, at Chapel Next and others, and even the Jewish service, you know, even my battle buddy, he was the rabbi for the post. And we were both frustrated, and he would question me. He said, why can't you go in there to the Garrison chaplain like I do and tell him that he needs to get this stuff together? I said, well, there are two reasons. Number one, I said. They kind of appreciate your faith a little bit more. But the second reason is he knows that if you are a Jewish soldier or a Jewish chaplain, if he doesn't give you what you need, he's going to get more backlash nationally than he would from me as a gospel service pastor. I said that's why you can go in there and, you know, basically almost flip his desk over as a captain and not get in any trouble. But if I even challenge him, even with all politeness and due respect, as I have said, I'm going to get my career threatened. That actually happened. So you know those things and many others, you'll see where disparity of treatment and what we're talking about free exercise religion is almost marginalized with the subjectivity and biases that exist and leaders and chaplains with leadership positions because they overreach. We're not careful to overreach our particular perspective of how a particular service or people are supposed to, you know, conduct themselves and even how many resources they need over what we would need just based on what we prefer, not what actually is needed.

When asked how he thinks this approach impacts the Chaplain Corps' ability to fulfill its assigned mission (SCM Bucket 3), he emphasized chaplains' roles as stewards and advisors.

And so, from my perspective and what I see. I don't think it helps. You know it doesn't. It's not going to help because when you think about what a chaplain is supposed to do. We're stewards of, you know, we're stewards of the religious support program for the command. And then also on top of that, we, if you will, kind of identify to the command, you know, who's in the formation from, you know, the religious perspective. But how are decisions and everything like that done, or are conditions set? This impacts soldiers, at least from a moral perspective. And then we're also supposed to be a guide and advisor to the Commander, to speak to him or her about, you know, morality and ethics. And if we're unwilling or have anything that blocks us from being, you know, true receptors of the health, morale, and spiritual health, we can't do our job.

I'll break it down. Many chaplains are hesitant to be honest and true bearers of integrity because they want their careers to go well. They want to, you know, progress. They want to have favorable assignments. So, instead of speaking the truth. They may give a fraction of it or the truth that, if you will, gives a warm

and fuzzy feeling to those in power or those who impact the chaplain's career. And that's what I've seen.

I asked Sam what recommendation he would make to improve or implement practices that would increase individual or corporate chaplaincy commitment to inclusivity and comprehensive religious support. He emphasized collective training with opportunities for dialogue and facetime with fellow members of the Chaplain Corps.

Yeah, that's a very great question. I remember the Chaplain Corps, and I wasn't. I wasn't able to weigh the scales of inclusion and diversity, but there was an effort that gave us facetime with everyone regionally in the corps, and that was called Chaplaincy Annual Sustainment Training (CAST). You know, now it was. It was what it was, but from my perspective as a young chaplain candidate at that time. You know, it gave us a place where it was, you know, low thread. You know, we were all educated together. We were all able to have, you know, of time where we could talk and mingle, but I thought it was pretty beautiful. So that's something that I know they say someplace. They still try to do something similar, but I think they took that program away or. I don't know if that program is funded or why it was taken away, but it's something that I think makes our core stronger or gives us at least more connection with one another. More facetime, and I don't know if they have to be reproduced digitally because of maybe logistical challenges. Still, I think that's something that we may need to look at to rid ourselves of, you know, people feeling they're not included and their voice is not being heard.

Participant 7 – James

James is a White male Army chaplain representing an evangelical Protestant faith group. He is a Colonel with 30–40 years of uniformed service and is currently in the Continental United States. I selected James because he scored the lowest on the second five questions. The interview was conducted telephonically through Microsoft Teams.²²

²² All quotes from this section come from Interview with James, November 12, 2024.

James's Experience of Free Exercise Facilitation

James is currently serving as a Senior Mission Command Chaplain after serving as a Garrison Chaplain, so he offered observations from both perspectives regarding facilitating the free exercise of religion.

I guess the main thing is, talking big picture first, I answered that from the seat I was still in, the Garrison Chaplain seat, I believe. So across the board, there is, you know, ensuring that we are setting up DRGLs, facilities, budget, and all of those things. I see it routinely working well. To ensure that everyone has the free exercise of religion. I think even on some of the things that happened here at [sic], right, we have some chaplains who are kind of, who would call themselves progressive liberal mainline, and you know, they don't, it would not be respectful to have them as a part of most of our congregations, because that's not who we're serving. And so, it's about, you know, how do we set them up? So, you think it's important to have an open and affirming service. You think this is part of your tradition? Then what do you need to get it going? Where is the plan? What are the requirements, and how do we evaluate that it's a good use of resources? I think that's often the norm, with some exceptions. That's why I strongly agree; I think those kinds of things are happening everywhere. And I think it's about getting a grasp on the fact that their freedom is my freedom. I don't have to agree. My responsibility is to ensure the government does its job to allow people, at the tactical level, I see, you know, you look down at battalions and brigades and brigades, and they're doing it. I mean, they're moving heaven and earth to make sure that their soldiers get their particular flavor.

So I frame it at Garrison and now as a senior here at [sic] because the focus is on our constituents. When discussing existing services, it's all about who sits in the pews. We'll take our flagship service, probably [sic] Chapel. So, largely, the people in the pews are conservative evangelicals. So, it would not be respectful of them to put a progressive Christian on the team. It would not be respectful of them to put a Latter Day Saints (LDS) chaplain on that team. Because. It's about them. And so by defining, I made all my congregations define who they were and who their people were largely; some were more nebulous, and some were more specific. Because it's about serving them, and it's not about the chaplains, it's not about the team, it's about the congregation. And so that's how I shape it, and I don't feel the need just to put people to work. But if they believe that a constituency here needs to be served, then it's on the government and me as a government functionary to ensure that we are providing that and doing what it takes now. We also have a Unitarian Universalist chaplain on the installation. If they wanted to actually start a service, we'd figure out and see what it needed. We'd also have to look, as stewards of our resources, to see if there are enough people. And then what are the gates you gotta get through to ensure this is an adequate use of our resources? Just like we cut services that aren't, you know, that have 15 people every week, and half of them are chaplains. They don't bring any

income, and it's obvious they have not grown. And could be our failure of leadership. Whatever. Or maybe people of that group don't want to attend and go off post. And so, which is the case in our open and affirming service, that they were, that they were working, had the plan, it was resourced, and it was really about the people that were already. Part of the group didn't want to meet on post. And so it ended up dying on the vine. So, going back to the original question is not necessary. My responsibility as a senior chaplain is to get it going, but it's my responsibility to make sure that if there is a need and we have the people to meet the need, we should set up the system to do that. But like Unitarian Universalists, they don't fit. They don't. They're not going to start their own. And so, do I expect them to be part of another team that would cause problems with one of our existing services?

James said a critical factor in developing and maintaining this approach is creating an environment for dialogue and transparent resource utilization.

I think one of the key components to that is creating an environment where we can tell the truth and talk about it. You know, we can actually talk about those issues. And I usually talk about situations where, you know, like this is the Army Chaplain Corps, so we gotta work and be professionals with people who are straight-up heretics. And they gotta work with me when they think I'm a straight-up heretic. And then there's the, you know, outlining of the government's role in all of this. And for those who, I think sometimes, the education process is, you got to somewhat separate; I have to have a split personality kind of. Like, what's my role as a Christian pastor, and what is my role as a government functionary? And that is both in overseeing religious support programs and thinking outside the religious realm.

And so, in my mind, there are some things: the over-spiritualizing function causes us challenges, and then we need to be honest and discuss this. This is the world we're in, and we don't have to necessarily agree. But you gotta agree that the government owes our people something, and we are agents of that government. So that's kind of how I shaped it. I think the honesty part, people are receptive once you like, when you just speak freely and frankly in groups. I think people are, you know, it's always a tension. There's a tension between those two dynamics all the time, and that's where we always live. And I would propose that if we don't feel tension. From whatever faith tradition we're in, if we don't feel the tension, that's probably either because we're naive or we've compromised. Because we should have tension between them. I think it's inherent in the system.

When I asked James how he sees this approach as valuable to the Army, he talked about its integration within Army systems, creating shared understanding and empowering leaders within a culture-shaping vision.

Really, for me, what we need is culture change, and we need to get back to that. Supporting the whole institution with religious support is not a side hustle but our core mission. And we gotta shape the system because we've gotten wildly, I think we've gotten wildly out of sync in the last few decades in that. And so it's really about change in the culture. But we gotta create the systems that allow that to happen. And I mean just, you know, simple things that set the conditions of, I mean, here in our command relationship order that comes out that talks about all of our command relationships across the corps. Well, we added that every unit in the [sic] is in a general support reinforcing relationship with their respective garrison as it relates to religious support. And so anything in the Army happens because it's in an order. But that's the legal authority for things to make that happen. In my mind, that is empowering supervisory chaplains to supervise so that our people are getting credit and their commands are getting credit for serving the entire installation. It can also be the stick in those conversations because a commander thinks they own their Unit Ministry Team (UMT) 100% of the time. Well, the senior commander of the [sic] and this installation disagrees. This allows us to work in that space, to empower UMTs, and then also so that the commands understand how this is supposed to work. And then following it up with actual orders that flesh out the details of where people are serving, what they're required to do, all that stuff, I think that's starting the process to set the conditions, and then it just, I think it's all it's about personal, it's about leadership and utilizing personal and positional authorities and resource to try to get there.

As we discussed recommendations for the Chaplain Corps to emulate at other locations, he reemphasized serving as stewards but highlighted the importance of engaging in dialogue and remaining open to new perspectives. This also requires looking beyond a quantitative analysis of religious demographics.

I really just think about taking a hard look at venues to listen to and hear from people about their vision and what things they're seeing that are not being done. I mean, that's what led to our ongoing thing about, you know, the progressive open and affirming service. If I'm in my own bubble, I'm not getting there. I'm not willing to drive that conversation.

We can't just look at the demographics; that's easy. The vast majority of people come from a Christian denomination. The majority of people who are practicing from Christian traditions are either Catholic or evangelical. But yet again, in many installations, those are the two most prevalent types of churches off-post. So we can't just be resource and demographic-driven. We gotta figure out what we owe to particular groups because we are going back to our legal function of why we exist. Someone who gets stationed at [sic], who is Jewish, well, we have just made them, by virtue of being in the service, done the same thing we do when we deploy people. We've taken them away from options, and their First Amendment rights suffer. So we, I think, owe those. We owe people

more at that installation than other installations with a plethora of things right off-post. And that all has to be part of the calculus.

Participant 8 – Lionel

Lionel is a White male Army chaplain representing a low-density faith group and serving as a Captain with 0–10 years of uniformed service inside the Continental United States. I selected Lionel because he scored the lowest possible on the second five questions. The interview was conducted virtually with audiovisual capability through Microsoft Teams.²³

Lionel's Experience of Free Exercise Facilitation

When I inquired about Lionel's observations of chaplains demonstrating a strong commitment to facilitating the free exercise of religion, Lionel described the formative experience of interactions with his first supervisory chaplain.

So, my first duty station was in Alaska. The brigade chaplain was [sic]. And I found him to be just the ultimate professional. And we had early on a, you know, like a National prayer day, and he put it out to everyone in the battalion to, you know, that wanted to be involved in it and to other people. Like said they wanted to. I didn't volunteer at first, and he called me later in the week and said, hey, you didn't tell me if you want to volunteer. And I was like, Nah, you know, like other people are more interested in it than I am. And he goes. Yeah, but you, like, we have all the same varieties of other people that volunteered, and variety is what brings life to life. And so I think there are people who will hear the message, and they would gain more strength by hearing your voice than by hearing five of one voice. And I'd like to invite you to reconsider and join. And I was like, OK. And so I did. And his sensitivity to that was like I hadn't thought, you know, like my voice matters to other people, possibly. And so his willingness to include me right from the get-go was exciting for me. You know, he pulled me aside and talked to me about the demographics at the chapel.

And so then when I have a soldier come to me, and they were, whether they're Muslim or whether they're Norse or whether they were 7th Day Adventist had a couple and they asked, I realized that me fighting for their values was incredibly important because of the way I felt when he was fighting for mine. And

²³ All quotes from this section come from Interview with Lionel, October 30, 2024.

so I really made it a priority and said I will fight, and one of my commanders looked at me and said, geez, you're really pushing for this guy like why? Why do you do it? I'm like because. The moment he feels valued in his faith, he's going to tell other people that you can trust the command. This goes a long way in building trust with people and strengthening these things. So, it translated very quickly for me early on in my Army career. And so I was; I was really grateful for [sic]'s guidance and his vision in that area.

Given Lionel's positive experience with his supervisory chaplain and subsequent demonstrated commitment to advocating for the free exercise of religion for others, I asked him how he thinks this impacts the Chaplain Corps' mission. He initially describes how his approach impacts individual soldiers but then discusses how this impacts the Chaplain Corps.

I think there's a way that, like the old quote says, we go to war with the soldiers, you have not the soldiers you want, and sometimes I know that I wish that every soldier that had a cross tattoo on their forearm or chest or shoulder, that they went to church every Sunday. And that's just not the case, right? And so when somebody expresses even a hint of spirituality or faith, I think it's our responsibility to sustain a minute to really encourage it and strengthen it as best as we can. When soldiers practice their faith like there's a lot of strength that comes down the line from it...But I'm not too concerned if they're joining my faith group. I just want them to practice faith. And I think that that benefits the community at large. And so I whenever I talk to like a Muslim soldier, wants a beard, I'm like, I hope that this beard will be symbolic of your absolute devotion that they, they'll know that they might only have contact with a handful of Muslims in their life, but this one will be an absolutely positive one, and they'll be able to defend the Muslim faith and say, hey, there might be a million psychos, but I know one who is absolutely flawless because I served with him in the military. And to me, that's powerful. And I have a little spiel that I try to give them. Just let himself. I believe in them. And if they'll believe in themselves, they can really lead positively. People around him and in all aspects of it.

Well, when one soldier you know likes my impact...when a soldier really feels cared about, I believe that soldier will tell 10-15-20-25 people. They'll just be shooting the bull, playing cards or something and somebody will bring up the chaplain and he'll defend the chaplain. He'll defend the profession. He'll defend the person and he'll stand by the like their sources for good. When you take care of one, they take care of many others through their testimonies. Of what our profession does so. You know, I support a lot of faiths that are not my own faith because I know that means that they'll strengthen our profession through the way that they talk to other people.

Lionel's approach seemed genuinely concerned for others and actively supporting various faith expressions, so I asked whether he faced any encouragement or pushback (SCM Bucket 4) to following this approach.

I think we all have all varieties in, in the military, but there are some that are less, less flexible, if you will. I don't know the verse in Matthew says take the beam out of your own eye before you take the Moat out of your brothers. Or maybe I got him backwards. I always forget, but I think there is some jealousy, maybe. Or maybe a beam in our own eyes. Sometimes when we're hesitant to help somebody. So I've had a few chaplains that almost brag in meetings about how they challenged a Norse Pagan. Because, you know, do they really believe Thor existed? I don't know if they need to believe that to believe what they believe right now, but whether they say yes or no, I I don't see why the the resistance to it. They're having enough courage to say they've done some things, and you do your basic interview with them and we're not really a justifier, but there's some that take great pride in almost having, you know, the 10 questions and no Norse Pagan can answer. And that's why they. Are the gatekeeper themselves, and they you know, they. Approval authority. So I'm always curious why they take this incentive on their own and to kind of stand up for their Christian faith and not allow pagans to wear beards. But I think to me, it's partially their jealous. You know, I I I don't see like, I've, I've seen a handful wearing the beards around and I don't see how it contributes to disorder or indiscipline. I know there's some that probably aren't the most sincere Norse pagans wearing the beard. But they do enough to wear it and I'm like. I don't see why I have to be a gatekeeper to that, but every time I see it, I encourage it or I strengthen it in anyway I can. So I don't know why some chaplains have this this standard of excellence, if you will, where they feel like their professional officer bid is to be a gatekeeper. I don't feel like I'm that gatekeeper. I feel like I'm an encourager and a strengthener. And whatever they bring to the table, like I'll hold the magnifying glass up to it only to encourage it and strengthen it.

When I asked about recommendations he would make for the Chaplain Corps, he discussed increased flexibility in counseling skills, providing values-based advisement, and shifting counseling approaches toward a customer-centric approach grounded in empathetic listening and needs-based responses.

Well, this next comment might get me in trouble with some people, but there was the question you asked earlier about like I view strongly that we should be secular counselors and not like Bible counselors, right? And the reason is that there's very like I think we should be Bible counselors to those that are, like Bible people, but for everybody else, we need to have enough wisdom and enough depth in in who

we are that we can talk from a place of wisdom from experience that we can use different philosophies. We got to be able to talk their language to them and not try to force our language on them like it's impossible. I wouldn't imagine if somebody would like, spoke Spanish. I wouldn't demand they speak English. I would find a Spanish speaker to help them understand it. And to me, that's like if we come from a less religious world. We can't speak the Bible to them and expect them to understand.

You know, like if I if I had a chance to change Chaplain Corps, I would. I would get rid of like preaching. Like we don't need to teach our people how to preach. You either know or you don't. You're either passionate about it or you're not. You're either going to work on it the rest of your life because you care about it, or you're not. I would give them some grounding. Grounding classes in philosophy and literature and allow them to become more well-rounded Renaissance men, so they can really connect with their soldiers because there's a cultural divide.

And so Clinical Pastoral Education (CPE) is a grounding like discipline, I think is beautiful because it's so engrossed in listening to where the other person's coming from and truly gaining understanding. And then you can move forward. When it comes to the family life chaplains, they learn how to do an intake form and gather all the information they can, and then they'd know where to start and how to progress. A couple through counseling. And pretty quickly they can say we're probably going to be 8 to 15 sessions based on your symptoms, all the criteria, all the things you brought forward when we bring a person in for Bible counseling, we're basically saying sit there and shut up. I read something in a theology book once and I want to tell you about it. I just don't see how effective that is sometimes. So like slow it down and really focus on what the person needs. There's a book, Non violent communication, I forget the guy who wrote it, but man, what a book like people have needs, we need to be able to meet their needs.

Participant 9 – George

George is a White male Army chaplain representing a mainline Protestant faith group and serving as a Colonel with 30–40 years of uniformed service. George serves inside the Continental United States. I selected George because he scored the highest on the last five questions. The interview was conducted telephonically through Microsoft Teams.²⁴

²⁴ All quotes from this section come from Interview with George, October 30, 2024.

George's Experience of Free Exercise Facilitation

When I asked about his observations of the facilitation of the free exercise of religion, George responded as a senior leader within the Chaplain Corps. George focused on training, education, and policy in light of constitutional concerns and legal precedents for the existence of the Chaplain Corps to relieve the burden created by military necessity upon an individual's free exercise of religion.

I have given thought to it in the last year and a half. And in fact you know my thinking has really become, it really has gained greater clarity on concepts like free exercise of religion in terms of burden and relief from burden. So I don't recall anything in any endorser training, in any chaplain training, in any UMT training, that identified the basis for free exercise as being the governmentally imposed burden. So that's why I answered the way I did.

I wanted to ensure I understood George's assertion clearly, so I inquired, "So you're saying there's an absence of discussion in installation training, chaplaincy education training, and the schoolhouse?"

Yes. At the 1st Amendment guarantees that the federal government will respect the free exercise of religion. But I would also say that what we mean by free exercise and religion and infringement are not nearly as clear. And I don't believe that the Chaplain Corps does a good job at answering that question. So for example right the current emphasis on spiritual readiness, does an individual or a group, right, professing a sincerely held belief require accommodation or relief from a burden a right, or is it a religious belief? And if it's a religious belief, then how does the Chaplain Corps train its people to understand the difference? And then in turn advise the Army...I think the key areas of advisement would be those that would infringe on the free exercise of religion, not spirituality, but of religion. Umm. Except when it is a military necessity.

I asked George for an example of military necessity to gain understanding and allow him to define the term practically while not imposing my understanding on the interview or interpretation.

I mean one that comes quickly to mind, and one that, you know, a few years ago, when I was a division chaplain, we really kicked back and forth a lot, you know, in large scale combat operation. Is it? Is it really effective, meaning, can we

mitigate the risk sufficiently, risk the People Risk Commission to hold one Chapel service a week, or do those need to be more dispersed? Right, the military necessity would, I think, prohibit or at least preclude a gathering of people in one place for a religious service. When that unit is, you know, under constant surveillance and that religious service gathering would become a target of opportunity and of value to the enemy. Compare that against, you know, current army, developing doctrine and Tactics, Techniques, and Procedures (TTPs) about dispersing command post, and so for an example, you know, a recent paper I read Armored Brigade Combat Team level Command post was, you know, two vehicles with antenna dispersed and hidden. All that kind of stuff now, you know, there's a military necessity to dispersion. Are we going to, are we going to say no Free exercise right takes precedence over the military necessity of not creating a target? Well, I would hope not.

Based on George's emphasis on removing burdens to the free exercise of religion and the reason for the Chaplain Corps' existence, I asked how we define whether the free exercise of religion is removed.

Yeah. So I think there's room for exploration of the concept or the question. You know who defines whether my religious needs are being met or not? What is a reasonable accommodation, I think, in the Army's eyes. The chaplain is the reasonable accommodation. However you know we then enter into this process of approving the DRGLs, etcetera. So I'm not. Geoff, I'm not sure I have an answer to that question as much as I have other questions about that question. And I'm reflecting on my own experience, you know, and in one of my deployments, I had a Catholic who would come to Sunday morning Protestant services because the only time we could get the priest was in the afternoon, and he had the watch, right almost every week. And so he and I discussed that, and we discussed it, you know, in great detail at that length, and you know, I walked away from that discussion with him, with a new appreciation that I'm not the one. I being the Chaplain, am not the one who defines whether the soldiers' Free exercise has been met or not. The individual does that. I don't know if I've answered your question or not, but I think an awful lot of chaplains find it easy to equate themselves with the end state when we're really just the means to the end state, which is free exercise.

Following this line of thought and the benefits this might have for the Chaplain Corps in terms of defining the facilitation of the free exercise as the removal of burdens, I asked how the Chaplain Corps could benefit from delving further into this concept. He

focused on teaching chaplains how to think critically about what it means to be an instrument of accommodation.

A chaplain may not come from an endorsed tradition that practices weekly communion. But is there a teaching point? Is there a developmental process to help that chaplain understand that? Yes, they are endorsed to provide the essential elements of religion, of their endorsed religious organization. However, in any given service, there may be folks from other religious traditions. And what does it mean for the chaplain, to act as the instrument of accommodation? For the chaplain who comes from the tradition that only does communion on the 1st Sunday of the month, they may need to sit down by themselves, with a supervisory chaplain, with their endorser, with whomever, and think about what it means to be the instrument of accommodation for those who believe that no, I come from a faith tradition that communion is weekly so will you serve me communion every week, chaplain? Well, no. In my tradition, we only do it on the 1st Sunday of the month. So then, is the chaplain acting as, I won't say, infringement, but I'll say, a barrier to the soldier's free exercise.

Given the individual nature of this process and the systemic concerns raised, I asked George whether he assessed that there are obstacles or incentives to creating education or training in the Army or from endorsing agents.

I've written about it. I believe that one of the greatest, I don't know that I would say obstacle, but an inhibition is the Army's comfort level with religious illiteracy. When you look at religion as applied to the strategic/grand strategic level, I think we can have a pretty robust discussion about the ways in which the United States and the United States Army stands alone in understanding religion and being religiously literate. I think there is a misunderstanding, a misperception, a misconception of separation of church and state. I think the Army writ large, the institution is comfortable with conceptualizing religion, as you know, something that happens on Sunday or Friday or whatever your preferred day of worship is. And I, yeah, I own this too, Geoff. And the Chaplain Corps is complicit in that illiteracy.

I've recently been giving some thought to the question I believe many commanders and soldiers conceptualize religion as a primarily personal pursuit. They don't conceptualize it as a program of support. The Chaplain Corps does not help the army understand religious support, right? So, for example, when I was a brigade chaplain, I really began to frame religious support as a class of personnel support. Right now, the Army goes back and forth with doctrine and regulation, and DOD does the same thing. But ultimately how does the sight picture change? If religious faith is understood. If the free exercise of religious faith and the chaplains role is understood as a class of support., rather than a primarily personal

pursuit, that's achieved through, you know, going to whatever field service or whatever the chaplain is doing.

Endorsing agents enter the process primarily at the policy level. Perhaps I should say are included in the process primarily at the policy level, right. It is DOD policy that an endorser to X, Y. and Z, certify both civilian education and then the two years of service required for endorsement. And a real opportunity for growth and development that I see there is the concept of what I'll term Christian citizenship, right or religious citizenship in the broader context. So how does one, and this is primarily, you know, the theological education piece. Which may very well mean, for example, that a theological school or seminary develops at least a chaplaincy certification within its master's program, for example, I know you know that this fall, Duke just started a certificate in chaplaincy. And I know other schools have done that. I'm sure others are probably contemplating that. But what does it mean to live as a religious citizen in a pluralistic nation serving a secular army? Looking back to when I came in, that was all experience for learning. Figure it out, chaplain. Right. Again, I think there's a great opportunity for development in that area.

Participant 10 – Jonathan

Jonathan is a White male Army chaplain representing an evangelical Protestant faith group. He is a Lieutenant Colonel with 20–30 years of uniformed service and serves outside the Continental United States. I selected Jonathan because he scored second highest on the last five questions. The interview was conducted telephonically through Microsoft Teams.²⁵

Jonathan's Experience of Free Exercise Facilitation

When I asked about his observations, Jonathan described his experience through a personal transformation journey.

Well, my initial entry was shocking as I came from a fundamentalist background where we were very conservative. Now, I had a blessing of growing up in the church, and had many incredible mentors in the church. They poured themselves into me. One of the distinct advantages in my assessment of growing up and being educated is that one of the distinct characteristics of that circle is that the concept of secondary separation is how I was trained. Primary separation was always

²⁵ All quotes from this section come from Interview with Jonathan, October 30, 2024.

instructed as being separate from the world. We are in the world but we are not of the world. We have to live in the world, but not be like it, and so that's a means of holiness, or not a means of holiness, but a characteristic of holiness. And that's a primary separation. But then I grew up in circles where it was strongly taught to follow secondary separation. Secondary separation goes beyond being distinct from worldliness and sin, but then also separating or being distinct from other professing believers who do not agree with the best way that is the standards of conduct. And so it was the way where women always were dressed a certain way. You don't go to movie theaters. You don't play cards. So a very socially conservative restrictive worldview. So with that, even in my seminary it was that way. There certainly was not any talk of operating in a pluralistic world. So when I joined the chaplaincy, I knew the Lord led me to it. But it was a massive, massive culture shock and a very steep learning curve.

So I am very thankful for how God used the chaplaincy to, in my opinion, round me out and smooth out some seriously rough theological edges. But the Chaplain Officer Basic Course (CHOBC), which became the Chaplain Basic Officer Leader Course (CHBOLC) during my class was a severe culture shock. And so we had world religions taught and how to interact with world religions, and the necessity of pluralism. But I was still very much in a fight-or-flight mentality, and it was. I knew the Lord called me to it, so it wasn't flight. I couldn't just leave. So I mentally and emotionally was very resistant because I just felt like everything was too vanilla that you know. Looking back now, I realize I was interpreting what was being taught through a skewed lens. But at the time, I was interpreting pluralism and operating in ministering in a pluralistic environment as having to be all things to all people without retaining any individual theological position, almost as if I had to forfeit everything and become, by default, nothing if that makes sense.

I was curious about how Jonathan's journey continued after his experience in CHOBC, so I asked him how training at his first installation went and whether that helped or pushed him further into his fight-or-flight mode.

So my first assignment is where, which was also my first deployment, the massive shift, the seismic shift in my theology, and then just theology proper, but then also the practice of that theology started to occur. So there was no installation or Garrison training. We were, it was during the surge, I was sent to Hunter Army airfield, a small installation which has two special operations regiments and then an aviation Brigade, of which I was a part. But everybody was forward. I was the rear detachment, so it was a baptism by fire. Because I was not only the senior pastor of the Chapel, but the only pastor of a chapel. There were no other chaplains around. I mean, it was me trying to get my unit ready for the deployment and the train up. Well, as being the installation chaplain and the Chapel pastor so I was just busy, busy, busy, and there was no training or anything like that. The seismic shift started began during the deployment. I went

to Iraq and honestly It began with my fellow chaplains, where, at that time, I was still of the mindset of secondary separation and thinking if you didn't go to the same school then everything is at stake. We are not the same flavor denomination, training and mentality and everybody else has compromised the truth and I need to keep a distance. Well, that's a little bit harder to do in a deployed setting. And as I was interacting with other chaplains of other denominations, I know it sounds silly, but I started looking to my left and right going. Wait a minute! They are way more godly than I am. They love the Lord Way more than I do. And it was a sweet gift from God that that I started interacting with my colleagues, and seeing their lives, and their dedication, and their selfless service, and the way they lived out their calling. It profoundly impacted me and caused me to go back to the book and examine what I was doing. What do I really believe and why? And that that really has just been a sweet journey. I don't know if that's one that ever actually ends or that should end, but there was no training. In my experience, in the beginning for that first assignment, it was about halfway through when I deployed and I started meeting other people and I had to rely on them and be part of a team that some of that started happening and I had to on my own, start doing some further study and research and soul searching.

I wondered whether Jonathan felt he had returned from that deployment more committed to supporting the religiously dissimilar. He responded affirmatively and provided an anecdotal account of how the journey impacted his family's faith journey.

So yes. It's not quite directly pertaining to pluralism and my journey with that, but a quick little anecdote. My wife also grew up in those same independent fundamental circles. Her father was an independent fundamental pastor. And in those circles, really, the greatest sin that a person can commit is the sin of compromise, to compromise your theological upbringing, to compromise your standards. And really, it's almost an inverted, weaker, stronger brother mentality. And so, you know, there was no listening to any sort of, you know, Christian modern Christian music. It was only hymns. And during that deployment I started, growing up, it was categorized as contemporary Christian music, I don't know really what everybody else called it, but you know, that was that was absolutely forbidden. It was. It was like the worst kind of music, even worse than just, you know, regular old rock'n'roll or anything because, you know, it's just like the devil's music in the church, but I during that deployment I started hearing some songs and I was like, I've never heard this song and it really started ministering to me, you know, come to find out this, this group that I never heard of called Casting Crowns. I was like, wow, this is like, these are really biblical songs. And I continue to study and evaluate the music. And I, you know, through a process of really considering what does it mean to worship God in spirit and in truth and to love the Lord, my God with all my heart. I actually called a family meeting when I came home from deployment. And I sat everybody down and I said It is no longer forbidden, this contemporary Christian music. It's no longer

forbidden in our house. I'm not saying you have to listen to it, but I have changed my position. I do not think that it is wrong or sinful or evil, and it has, you know, it has been a huge blessing to me. And if you are so inclined, you are absolutely, you know, like it's OK. Oh, my wife got so upset with me. She was really angry and she just said I knew it. I knew it. You would compromise. I knew the chaplaincy would cause you to compromise and my oldest daughter, who is only probably 8 years old, was crying and she just said Daddy, does this mean that you were wrong all this time. Is it OK if I still don't listen to it? This is how ingrained these types of things were in our minds. So it was a full ministerial almost revolution, and pluralism is just the 11th spoke in that hub, but with that, then came even a shift of where we would worship. And you know, we were OK with even going to or considering a non-denominational church which even though it's still evangelical and Protestant. For us, that was like a baby step. An initial step even towards this mindset of ministering in a pluralistic environment. The first step of pluralism for me was pluralism within Christianity. Which was, I mean, even saying it now seems like it was a small insignificant step, but actually it was a very dramatic step in this journey for us.

.Given that our focus was on training and education (the focal point of the last five questions of the survey), I asked him what ongoing education and training by his endorsing agent look like.

.So my opinion of [sic], and I'm not saying it's a bad or negative opinion, but there is a strong emphasis on pastoral skills, counseling resources, emergency or crisis response resources, preaching and evangelism resources. But I have personally never been a part of any official pluralism training. Now, I'm also probably just a bad [sic]-endorsed chaplain because, for whatever reason, I have not been able to attend many endorser conferences, but I do frequent the websites and I do try to do some of their various webinars and different online opportunities that they offer. So anyway, so that's just my personal experience as well as just some of my observations that that the [sic] focuses much more on the pastoral skills, evangelism and preaching skill sets and requirements, and not so much on navigating pluralism.

.Curious about installation training experiences since his first duty station and about recommendations for best practices to emulate, I asked about his experiences and recommendations.

.Have I seen it? Yes. Have I seen it frequently or often? No. What did it look like? Honestly, I don't think I didn't appreciate the way it was done. That I don't know. Maybe three, maybe three to five times that I've seen it done over the years because it looked like a parade of nations, basically. It was for the next three or

four hours we're going to have five individuals come and speak, and this person is a Norse soldier. This is an LDS chaplain. This is a Christian Science. You know, whatever it may be. And it was basically, it was a little parade of religions. people get up there and just kind of speak and say this is who I am. This is what we believe. These are our resources and if you have more questions, I have a booth in the back or I have a flyer and then it was OK. Thank you so much for that. Next person up and that that might be, I don't know, especially in a in a Chapel or a room full of unit ministry team members. I don't really see the value in that and I don't really see like it could have been better if it was, if each presenter was coached with a very specific question of hey, how do you best minister to soldiers of this faith and they got up there and for their 20-30 minutes they got up and said this is this who we are, and because of who we are, this is what would really go a long way.

I would make it about how to teach people. I have an inject I'll put here before I get directly to your question. Your dissertation topic resonated deeply with me, and I don't always agree to follow up on phone calls or interviews. You probably know even better than I do about how many can actually start hitting your inbox. But yours resonated very deeply with me, and my D.Min project aligned with this. I wish I could develop a whole lot more, but it was entitled Chaplains Under Tension: How to Navigate the Free Exercise of Religion? And the entire premise of it was no matter what religion a chaplain is, whether it's Christian or not, in order to provide for the free exercise of religion, every chaplain will experience a certain element of tension, of compromising their own convictions, and then how to navigate that tension. Where you know, is it a good thing or not a good thing? And so of course, it was coming from my journey of hyper-isolationism to ministering in hyper-pluralism, and I realized that it wasn't a unique tension or struggle for me, but truly ubiquitous for all chaplains to one degree or another. And so this is very near and dear to me. I think going specifically to your question, as far as if I had a choice and how do I, how would I do this, which I do get the opportunity to do these things now which is a wonderful joy. But the two key kinds of work I think really are dialogue, and I'm not you know, obviously I'm admitting no truth bombs here, but dialogue and hospitality. And so how would I go about trying to teach and educate train on pluralism within the chaplaincy. I think dialogue is far better than a simple brief. So what did that look like? It could look like inviting some chaplains who are friends. But who are not of the same religious background. And putting them up on a platform, giving them a microphone, and having a moderator asking things like, So how long have you all known each other? Tell us about your friendship. Have you ever worked together? And then from that baseline of stability, then go into: So what do you believe on this? What do you believe on that? So how do you two in your own personal friendship, relationship, collegiality, how do you navigate that? And it could go everything from simple TTPs, to also asking theologically what allows you to work with this person where you're so opposed to this person according to your belief and according to your own mouth, doesn't necessarily hold the orthodoxy, but what theologically allows you to work with them? And what are the limits? And so having a very candid moderated

conversation in front of other people so that they can talk from their own experience of the depth of their friendship, the depth of their relationship. But then also the limits and then how they manage those limits? So that would be one such example you know dialogue. It can be constructed and organized and prepared in such a way that I think would be very impactful because it's already digested and it's being presented in a distilled, very potent manner. But then the second time, and this is coming from me personally, What does it mean to be hospitable? And I I'm kind of answering part of that first part for myself now. But more and more as I study and I try to understand what my own theology of hospitality is. More and more I am finding that it's in that realm of hospitality that I can operate within a pluralistic environment. Hospitality. The essence of hospitality is to receive another with pain.

So there's an element of inconvenience. There's an element of sacrifice. There's an element of internal dissonance. And yet, despite that, I'm graciously going to receive you anyway. And so, I mean, hospitality could be welcoming a stranger into your home in the middle of the night. It could be sharing your own food, and you have less, or giving your own money, and you have less. But I think it could also be I'm going to receive somebody who is theologically different, and that difference causes me some discomfort, but I'm still going to graciously receive you. And so and of course, dialogue and hospitality are very, within this understanding, I think are very interconnected.

Participant 11 – Lewis

Lewis is a White male Army chaplain representing an evangelical Protestant faith group and serving as a Lieutenant Colonel with 20–30 years of uniformed service. Lewis serves inside the Continental United States. I selected Lewis because he scored the lowest on the last five questions. The interview was conducted telephonically through Microsoft Teams.²⁶

Lewis's Experience of Free Exercise Facilitation

Lewis describes the development and refinement of his approach toward facilitating the free exercise of religion through multiple experiences. He initially spoke of the formative impact of his chaplain in the National Guard.

²⁶ All quotes from this section come from Interview with Lewis, October 28, 2024.

I had early experiences in the National Guard a long time before I became a chaplain, which gave me the impression that chaplains were supposed to be oriented around showing interest in everyone's spiritual concerns and needs, more of a listening stance. The role of the chaplain was more of one who helps other people process their own values and live up to their own values. More than trying to commandeer conversations or experiences to promote their own ideals. So, I summarized that as the example of my National Guard chaplain for 10 years, from private to captain, he was Socratic.

Lewis describes several formative experiences during seminary and while he was part of the chaplain candidate program, albeit they are not all positive.

That continued in seminary. And also with my endorser. Through the chaplain candidate program, I was exposed to [sic], and he emphasized the difference between, you know, the denomination, our shared denominational role as elder teacher preacher in the reform tradition, to, you know, again, more of this Socratic approach to helping others mobilize their own belief system for their own goals. Yeah, very, very good. He was part of the endorsing commission, but my endorser was [sic], and he emphasized the same thing and modeled it.

I remember when our seminary was helping guys through their packets to apply for appointments as chaplains, and one sheet included a statement of support for pluralism. I love that. You know, I enjoyed reading it and enjoyed signing it. And I have always kind of celebrated that commitment. It showed me that I was supposed to actively and not begrudgingly work alongside other religious professionals who would have very different perspectives.

[Within seminary education itself], our seminary was dominated by part of the program [that]...attempted to engage with the culture, with people of different cultures, philosophies, and religions, by listening and focusing on existentialism. Or you know how they put it, people believe things because they get something out of it. And the other people's beliefs, no matter how different or odd. They may seem to us they do something for that person, and until we understand what they're getting out of that belief system or practice, we're not really ready to offer them anything.

As a chaplain candidate, I had a practicum at Fort Jackson and got some other distasteful images. I remember being farmed out to spend some time with some battalion chaplains, you know who are out, like in the infantry unit or the training units, Basic training. And one fellow was particularly, I think, disagreeable, and seemed to be the opposite of this other view of the Socratic stance. Yeah, I could see on the soldiers' faces and the other chaplain students, you know, that I was with, that this is not the way to win friends or influence people. He was very, very kind of dogmatic and judgmental. So I kind of got the picture from seminary, and then there are good examples that show a difference between what I was told is evangelical and fundamentalist. But evangelicals were interested in being in the world and not of it, you know, we bring a different message, but it doesn't have to be inherently rude.

Lewis described a similar dichotomy of approaches while he was a student in CHBOLC, where the instructors modeled a positive approach and the senior leader, the commandant, modeled a negative approach.

I would say that initially, going to the Chaplain Basic Course was somewhat troubling in the sense that the Commandant at the time seemed disturbed, very seemingly unable to model that himself. But, the instructors were doing it well.

I asked Lewis how this approach was encouraged or discouraged (SCM Bucket 4) as he joined the operational Army and what training or leader behaviors reinforced.

I would say that I was rewarded initially. I'm talking about within the first assignment on active duty as I served under [sic]. He was my group chaplain. And again, he modeled, but he also celebrated an educated approach to world religions. And the Army, in that case, the Special Operations unit operating all over the world depended upon us as chaplains to have a kind of academic or pluralistic interest in the in the locals. So, he was active at that time, around 9-11 involving us in realistic area analysis in Asia, which is centered on not only the, you know, the typical Asian eastern religion, but also Islam. And so, he appreciated and commended me and other people for paying attention to what's different between religious groups. So we understood that A as a command deployed to a land that had Muslims, but it is not just Islam as you read it out of a Wikipedia that there is nuance and there is difference in the traditions and that were not useful to the Army or to our unit if we didn't have a more critical thinking approach.

I then asked Lewis for recommendations for practices other locations should implement to be more inclusive and comprehensive.

I think having Chaplains [trained] without the chaplain assistants present would be helpful for guided discussions or possibly professional education, in-service training, or leadership professional development around Chaplains of different Religions and traditions within religions to talk more about how they see their own role, what they're expected by their endorser.

Lewis expanded upon the training concept by recommending a facilitator who can play devil's advocate to build religious empathy and critical thinking. I asked if

religious empathy is important for this model and what other recommendations he has for developing this skill.

Yes. Mm hmm. Yeah, very much. That was extremely helpful. I think the Chaplain candidate experience program can be critical. I remember being made deliberately go around and spend time with chaplains of extremely different endorsements as a chaplain candidate and observe them. Can I expose myself to their experience? And so very early on, I remember being involved with Catholic chaplains. And I got a book that I have in my hand which I have carried around for all these years. And it's called the Catholic Soldier Handbook series. And this this was either put together or reprinted by the head Catholic Chaplain. And, I think the earlier version says religious support for the Catholic soldier. And I thought this was brilliant because it's all about a chaplain producing something for commanders and for other chaplains, which would again help them have accurate awareness and hopefully something for the needs of Catholic soldiers.

As we concluded the interview, I asked Lewis what kind of feedback he received from fellow chaplains.

I think over the years I have periodically worked for people or worked alongside some people who really did not appreciate this kind of Socratic method. And so I think I have been perceived at times as some kind of a universalist. And sometimes it's gone the other way, because although I have this stance, I love the pluralism. My endorser is also very clear on the boundaries of religious practice for our chaplains. And you know, says that it's not appropriate for our chaplains to do certain things or participate with certain people in public religious practices. And then some people who would be farther on the progressive end have accused me of being too narrow...It's funny, you know. So on the one hand, I try to let it run off my back because I love, I love the pluralism. And yet at the same time, I think I suffered a bit professionally. At times, where people distance themselves from me, or suggested that there's something wrong professionally with me or not professionally but personally.

Participant 12 – Kate

Kate is a White female Army chaplain representing a mainline Protestant faith group. She is a Major with 10–20 years of uniformed service. I selected Kate because she

scored second lowest for the last five questions. The interview was conducted virtually with audiovisual capability through Microsoft Teams.²⁷

Kate's Experience of Free Exercise of Facilitation

Kate described multiple situations where she facilitated the free exercise of religion and the immediate and delayed feedback she received. Two notable examples she relayed involve public prayer and support for religiously dissimilar groups.

I've seen a couple. I know that the chaplain corps goes back and forth in the discussions regarding Christian chaplains praying in Jesus' name. We talked about that when I was in CHBOLC in the summer of 2011. One of the chaplain facilitators said we should use the phrase, "I invite you to pray in your tradition as I pray in mine." This is the first time I'd heard that. Now, he did say I offered this prayer in Jesus' name at the end, but that whole conversation got me thinking about the most hospitable way to pray at an event with mandatory attendance. I'll open the prayer with that, but I don't pray in Jesus' name. First of all, it's not required by my endorser, and I think that's one of the things driving a lot of the way it goes back and forth and back and forth. And just like I said, my 13 1/2 years in the army, but my endorser doesn't require it. My personal conscience is that I look at the Bible, and there is no requirement that the only place you know my personal theological beliefs in any case is, so I don't. And so my first battalion was at [sic] at a signal battalion. I said, please pray in your tradition as I pray in mine, and then I ended it with the doxology. My executive officer commended me. She's like, I'd never heard it like that before, and I like that. The other thing that came out of it was that I had soldiers who came to me because that approach built trust. In fact, one of the soldiers is Wiccan, and in fact, she served her term and got out and married a guy who's a drill Sergeant. But we stay in contact. She's like one of my Facebook friends. We have stayed in contact partly because she told me that my praying in that way seemed like I would not try to convert or proselytize her. And so I have carried that lesson with me my entire ministry, and I've shared it whenever it seemed like people were open to listening. But usually, when we're in a discussion about this. It's usually a senior chaplain saying, and there's no room for dialogue, and then they go on to the next topic they want to give wisdom about, and there's not really a conversation. So that is my experience and the benefit that came from it: it opened doors that might not have otherwise been opened or might have been harder to open and made me more trustworthy to some soldiers. I know some, there's a lot of chaplains that say, like in your holy

²⁷ All quotes from this section come from Interview with Kate, October 31, 2024.

name and various things. So, people are all over the board about it. But I can only speak to my experience in this instance.

The other thing that personally I have done is, at Fort Riley, I served as the chaplain sponsor for the Pagan Wiccan Open circle, and I would go. Just hang out with them before they start their instruction time. However, once I did stay there, where we made, like, a little craft because I just wanted to do the craft and learn about what they were saying. But. I would usually, when there were some new people, you know, because there's always a rotating group, and I'd say, yes, I'm a Christian chaplain and firmly Christian. However, I view hosting this as a matter of Christian hospitality. And that's providing a space for you all and following the golden rule to treat you all the way I want to be treated if I were in your position. And so phrasing, you know, I believe those, but until I thought about it, I would like to say and explain why I'm here to folks with different beliefs than mine. That's why I think it's important for me to be here, and I value being able to be here.

Kate summarized her practices and explained the foundation for her approach, particularly emphasizing instruction received during CHBOLC.

And I will probably go back to my reason for thinking of this besides my own personal religious beliefs. I vividly remember at CHBOLC. Umm, one of the first couple of weeks, they had Karen Defendorf come and talk about her experience and *Katcoff v. Marsh*.²⁸ And hearing from Karen and her overarching message, we exist constitutionally to provide for the free exercise of religion. And you know that that message came over loud and clear in CHBOLC. So besides my own personal beliefs, that shaping at CHBOLC, specifically from the block of instruction given by Karen Defendorf. I'm sure you've probably heard it, and it was formative. And me taking off from what already probably would have been my personal theological inclinations.

Because Kate spoke of her theological background as part of the reason for her approach and because she was selected for answering favorably about education and training, I asked about how her seminary and pre-chaplaincy training informed her approach.

Our seminary experience is 4 years, and that's if we aren't doing like the various hybrid models they have now. This is back in the 90s. So, you know, I went straight from college into seminary, so I'm going to college. Where you're already having your mind broadened and meeting people different from you, from

²⁸ *Katcoff v. Marsh*, 755 F.2d 223 (2d Cir. 1985).

different backgrounds, cultures, and beliefs, so I would say that part of that was already there for me personally and even predates that because of the way that my parents taught us to accept people for who they are. I remember there was this little plaque upstairs, kind of in between the door to my bedroom and the door to their bedroom, and it had some Native American saying. And it was something like we shouldn't judge someone until we've walked a mile in his moccasins or something similar. I don't know if it was authentically a Native American saying, but the message still holds true and stuck with me, so I had that formation undergirding before college and then seminary. We also have to take a unit of CPE as a graduation and ordination requirement in the [sic], so that is also where you learn to be around many different people. On my CPE side, there were three smaller medical facilities, including a dialysis center. You would do a rotation of a couple of weeks in the dialysis center. They rotated all the students through there at some point during the summer when you were there for a week or two. And I prayed with the Muslim patient. He asked me to pray with him, and he's like, well, you pray the way you're going to pray, and then I'll pray what I'm going to pray. I suppose that I met Muslims in college, but I had not had a situation like that where we're sharing a moment of faith together in kind of a parallel experience. So, I think that CPE is a valuable experience.

I followed this response with a question about how this approach might help the Army Chaplaincy.

I think it helps because the world, especially our nation, has many different beliefs. You know, people are able to be out in the open about their beliefs, too. It's not like something where people hide that they're, for example, an atheist or a Pagan, you know, a Norse Pagan. It's where we are both in our pastoral formation and in our encouragement from our endorsers as chaplains to be people of hospitality and grace. We ought to be someone who soldiers might seek out. And I am not saying that soldiers don't seek out chaplains from traditions that always pray in Jesus' name, but it provides an opportunity. Maybe when soldiers know that there are chaplains where, if they've come from positions where they have had bad experiences with Christians, it might make them more open to talking. So our presence in the Chaplain Corps ranks hopefully welcomes people to come speak when they're at wit's end, and they don't know where else to turn. And that there is someone out there who will listen to them and accept them for who they are. So that's why I think it benefits the chaplain corps overall.

Following this explanation of the benefits to the Chaplain Corps, I asked Kate if she had perceived any obstacles to adopting this approach.

I have experienced any overt occasions where. I have been told not to do something related to that. I think it's more in the teaching conversations where you're like, well, you should absolutely use Jesus' name. And there's no reason

why just senior chaplain conversation moments in a group conversation. They are speaking and clear about speaking from their personal opinion. It's always interesting; military and rank can sometimes make that cloudy. The Chaplain Corps is probably more challenging than some in that regard because we have the power of rank tied with very closely held beliefs, and we are all chaplains. With chaplains as ideologues or ideologues by nature, we're trained by our endorsers to be ideologues. You have to believe our theology, or you need to find another denomination to go to. For example, I take this in my ordination vows, which state that I will preach according to the [sic] confessions and creeds. And because we think passionately, we feel passionate, and they're like our closest-held beliefs. As you know, your capstone theological paper is at the end of seminary. It can sometimes make those things challenging in a pluralistic chaplain corps when there are folks who either overtly want things to go the way that they think they should go, or and I'm talking about from their theological perspective, or subconsciously think like a lot of things we do as human beings, we do it subconsciously, and we're not always tracking our motivations or even our behaviors that stem from those.

I followed this question with a request for recommendations for the Chaplain Corps. She recommends that senior chaplains demonstrate transparency and change, that we recognize the authority endorsers have, and that training on other religions involves practical suggestions with daily impacts for supporting those faith practices.

My initial inclination is that we could occasionally have instructors, whether they're chaplains or not, but clergy or religious leaders in their tradition, come to talk about their beliefs. I think it would be helpful to have senior chaplains talk about how they've done things and why they find, you know, value in that practice.

We know we have Jewish soldiers, but what does it mean to be Jewish? Like, OK. We make sure that they have access to Seder. But what does it mean to be Jewish for the rest of the year?

We can't tell endorsers what to do. But to empower people to think about things in such a way that they might reconsider options. And I think you know the endorser is kind of in a tough position because they have a certain, they have a lot of power. They certainly have power over individual chaplains because you need to find another endorser or career if you don't have an endorser.

Kate also highlights the need for chaplains to remain connected with chaplains and religious professionals from other faith traditions to avoid a shift away from comfort

and familiarity with religiously diverse others, noting that the formative experience in CHBOLC requires reinforcing mechanisms.

When you think about it, like most chaplains, once they get out of that training environment, they're in their unit, and they're in a chapel service, or whatever of their own, most of the time, tradition. You're losing that interconnected environment and learning. You don't necessarily have to, but you can get siloed.

Shared Themes Across Participants

Based on the preceding presentation and summary of the data generated by the study, a summary of findings/conclusions is

Shared Theme 1 – Education and Training

The interviews reveal significant gaps in preparing chaplains for pluralistic ministry. Most chaplains describe limited or no seminary training for supporting different faiths, with some noting that their theological education emphasized separation rather than engagement. Military training shows inconsistency, with Basic Chaplain Officer training providing initial exposure but lacking practical application. Installation-level training often reduces to superficial “parade of nations” presentations without addressing how to support different faith groups.

Several chaplains note that their endorser training focused on pastoral skills within their tradition rather than pluralistic ministry. The absence of standardized resources or guidance for religious accommodation leaves chaplains learning through trial and error. Many describe relying on personal growth experiences or mentorship rather than formal education to develop skills for pluralistic ministry.

Shared Theme 2 – Personal/Professional Tension

The interviews consistently highlight the tension between chaplains' religious convictions and their institutional role in supporting diverse faiths as government stewards of resources. Some describe initial struggles reconciling their theological training, emphasizing exclusivity, with the requirement to support all faiths. Others note challenges in balancing endorser requirements with military duties, particularly around religious accommodation requests.

This tension manifests differently across denominations. Some chaplains describe internal conflict over participating in interfaith events or supporting faiths they theologically oppose, while others struggle with institutional pressure to be less inclusive than their tradition allows. Several mentioned learning to maintain an authentic religious identity while creating welcoming spaces for other faiths, describing this as an ongoing process rather than a resolved tension.

Shared Theme 3 – Leader Influence

The interviews highlight leadership's crucial role in shaping religious support culture. Senior chaplains who model pluralistic ministry and actively support religious accommodation create environments where junior chaplains feel empowered to do likewise. Conversely, leaders who demonstrate resistance to accommodation or show bias toward certain faiths create obstacles.

Command support proves essential, with several chaplains noting how supportive commanders facilitate religious accommodation while resistant ones create barriers. Many describe rank dynamics complicating religious support discussions, as senior chaplains' theological positions can be amplified by their rank authority. Several

mentioned positive early-career experiences with mentors who demonstrated effective pluralistic ministry and shaped their entire approach to chaplaincy.

Shared Theme 4 – Approaches to Support

The interviews reveal several common support approaches that chaplains found effective. Many emphasize active listening and genuine curiosity about others' beliefs rather than imposing their views. They describe building trust through demonstrating respect for all faiths and creating welcoming environments where soldiers feel safe discussing spiritual needs.

Several chaplains stress the importance of hospitality, defined by one as “receiving another with pain” - acknowledging discomfort while still providing support. Many describe focusing on understanding how beliefs function in people's lives rather than judging their validity. These approaches emphasize practical support over theological debate, with chaplains noting how demonstrating authentic care while maintaining clear personal identity builds credibility with service members.

Shared Theme 5 – Systemic Issues

The interviews reveal several systemic challenges to effective religious support. Multiple chaplains cite misalignment between doctrine and practice, with religious support inconsistently placed within Army structures. Resource allocation presents ongoing challenges, particularly balancing demographics against actual needs and local religious options.

Chaplains describe a lack of standardized processes for religious accommodation, noting wide variation in implementation across installations—several mention

insufficient tracking systems for faith group demographics and religious support requirements. The absence of centralized resources or guidance leads to chaplains “recreating the wheel” at each location. Chaplains also highlight a need for integration with the command and command processes/systems.

Many highlight structural barriers between unit and installation religious support, describing challenges in coordinating resources and coverage across commands.

Shared Theme 6 – Transformation of Understanding

The interviews reveal a significant transformation in chaplains’ understanding of pluralistic ministry over their careers. Many describe moving from initial resistance or uncertainty to embracing support for diverse faiths through direct engagement with service members. This transformation often begins through formative experiences with mentors or colleagues demonstrating effective pluralistic ministry.

Several chaplains detail personal theological journeys, reconsidering previous rigid positions after witnessing authentic faith in others. These experiences led to a broader understanding of maintaining personal religious identity while supporting different beliefs. Some describe this transformation as extending beyond professional practice into personal life, affecting family religious practices and relationships.

The progression typically moves from viewing pluralistic support as compromising beliefs to recognizing it as enhancing their effectiveness as chaplains. Many note that this transformation continues throughout their careers as they encounter new situations and faith traditions.

Summary of Findings

This analysis examined themes regarding religious support across 12 chaplain interviews. Key findings include significant gaps in education and training for pluralistic ministry, ongoing tension between personal faith and professional duties, and the crucial impact of leadership in shaping religious support culture. Chaplains described evolving approaches emphasizing listening, hospitality, and authentic engagement while navigating systemic challenges like doctrinal misalignment and resource allocation. Most noted personal transformation from initial resistance to embracing pluralistic ministry through experience and mentorship. The interviews highlighted progress and continuing challenges in facilitating religious free exercise in military settings.

Forecast of Chapter Five

Chapter five will present an overview of the findings in detail in this chapter and proceed into a detailed interpretation of the findings within each of the six shared themes. The chapter will then analyze the study for intersections with existing leadership theories, its contributions to research literature, recommendations for future research, and a conclusion.

CHAPTER FIVE

Discussion

Introduction

This chapter examines research findings of the lived experiences of active-duty U.S. Army Chaplains and the facilitation of the free exercise of religion. Using Brinkerhoff's Success Case Method,¹ the research analyzed individual experiences and shared patterns among participants. The discussion explores significant themes from the data, interprets findings relative to existing literature, and considers implications for practice, leadership, and future research in supporting the free exercise of religion within military settings.

Summary of the Study

The study explored how chaplains experienced receiving, facilitating, and witnessing religious support, based on the premise that facilitating the free exercise of religion is a core requirement of the Army Chaplain Corps and assuming that proactive facilitation benefits individuals and teams preparing for or conducting operations under challenging conditions.

The research began with an overview of the practice of military chaplaincy that frames a quantitative survey. The survey was sent to 1,478 active-duty Army Chaplains and achieved a 23% response rate. Of those who completed the survey, 162 volunteered for follow-up interviews; twelve participated in follow-up interviews, representing

¹ Robert O. Brinkerhoff, *The Success Case Method: Find Out Quickly What's Working and What's Not* (San Francisco: Barrett-Koehler Publishers, INC, 2003), Kindle.

diverse ranks, genders, and faith traditions. The selection process identified respondents from both ends of the response spectrum to understand what was present in the most and least successful responses.

The guided interviews used open-ended questions to solicit participants' experiences and recommendations. The research utilized Microsoft Teams to conduct interviews, with recordings automatically transcribed and carefully reviewed for accuracy. Interview responses were coded using qualitative analysis to identify common elements across participants' experiences. The goal was to understand individual experiences and shared patterns in how chaplains navigate supporting religious free exercise in military settings.

Summary of Major Findings

The research revealed six major themes across chaplain experiences facilitating religious free exercise. First, significant gaps exist in education and training, with most chaplains describing limited preparation for pluralistic ministry and learning primarily through experience rather than formal instruction.

Second, chaplains consistently described a tension between personal religious convictions and professional duties. This manifested differently across denominations. Some struggled with supporting faiths they theologically opposed, while others faced pressure to be less inclusive than their tradition allowed. Many developed strategies to maintain authentic religious identity while creating welcoming spaces for other religions or spiritual traditions.

Third, leadership proved crucial in shaping religious support culture. Senior chaplains who modeled pluralistic ministry created environments where junior chaplains

felt empowered to do likewise, while resistant leaders created obstacles. Command support significantly influenced religious accommodation success.

Fourth, successful approaches emphasized active listening and hospitality rather than imposing views. Chaplains described building trust by respecting all perspectives and traditions and creating safe environments for respectful dialogue. Several stressed the importance of “receiving another with pain”—acknowledging discomfort while providing support.

Fifth, systemic challenges included doctrinal misalignment, inconsistent resource allocation, and lack of standardized processes for religious accommodation. Many chaplains noted insufficient support or guidance systems and the need to “recreate the wheel” at each location.

Finally, most chaplains described significant transformation in their understanding of pluralistic ministry. Many moved from initial resistance to embracing support for diverse faiths through direct engagement with service members. This transformation often began through formative experiences with mentors demonstrating effective pluralistic ministry.

The Researcher as Person

As interviews were conducted, participants often shared experiences that raised personal concerns about ethical challenges within the Army Chaplain Corps. To control for biases against these behaviors, the phrase “curious engagement” remained visible at the top of the journal and handwritten at the top of the guided interview questions worksheet as a reminder to focus on understanding and asking questions to fill the five

buckets of SCM. I also engaged in focused breathing exercises or took a break to clear my mind in preparation for the next interview.

In drafting and revising Chapter Four, the dissertation chair perceived a bias against conservative Evangelicals because I grouped faith groups into low-density, mainline Protestant, and conservative Evangelicals. Upon reflection, it was determined that the term “conservative Evangelical” is laden with judgmental connotations. It is also my experience, as an evangelical, that conflict within the Baptist tradition sorted people and churches along a conservative-liberal spectrum. For that reason, increased attention was focused on fair and balanced analysis and interpretation of interview data, and the term “conservative evangelical” was replaced with “evangelical Protestant.” I considered more specific faith terminology when such identification did not risk the reidentification of the participants but was unable to do so without risking reidentification.

Conclusions Related to Research Purpose

The following interpretations of the guided interviews directly correlate to the research question with practical application implications.

Conclusions About the Research Question

The research question sought to explore how the successful and unsuccessful facilitation of the free exercise of religion offers practical insights and exemplars to improve the Chaplain Corps’ effectiveness in fulfilling its core mission. Coded analysis of the interviews provides conceptual and practical insight into best practices for improving organizational and individual facilitation of the free exercise of religion. Participants’ intermingling of practical and conceptual concerns underscores the importance, in research, of reading and rereading the data (iterative consideration) in

developing a strong practical framework, including conceptual understandings, practical behaviors, and processes.

Interpretation of Findings

A coded analysis of the guided interviews revealed six shared themes with practical and conceptual implications for the research questions. For this reason, the interpretations below draw from the participants' interviews, juxtaposing the most and least preferred examples and concluding with implications for the Chaplain Corps.

Shared Theme 1 – Education and Training

The most commonly shared theme across the twelve participants was education and training. Participants discussed pre-chaplaincy education, formal military training and education, installation and unit-level UMT training, and religious organization endorser training. Most of the participants provided recommendations that included education and training.

Most participants recounted little or no pre-chaplaincy education focused on providing religious support in a pluralistic setting. Most recounted education focused on separating from those theologically different, with increasingly stringent expectations and measures within theologically similar groups. Jonathan characterizes it rather succinctly, “As far as my upbringing and then my initial transition into chaplaincy, it was honestly almost as antithetical to ministering in a pluralistic environment as I could conceive.”² For these participants, education or training on working with theologically different

² Interview with Jonathan, October 30, 2024.

groups focused on missions or evangelism. Three participants described formative experiences in seminary or as part of the certification process that broadened their theological apertures and appreciation for working with and supporting the theological other.

The Basic Officer Leader Course (BOLC) classes received varied receptions at the institutional level of education and training. One participant highlighted the importance of a now-retired chaplain talking through chaplains as instruments to remove a government-imposed burden on free exercise:

I vividly remember at the Chaplain Basic Officer Leaders Course (CHBOLC). Umm, one of the first couple of weeks, they had [sic] come and talk about her experience and Katcoff V. Marsh. And hearing from someone and her overarching message, we are here. We exist constitutionally to provide for the free exercise of religion. And you know that message came over loud and clear in CHBOLC. So besides my own personal beliefs, that shaping at CHBOLC, specifically from the block of instruction given by [sic]. I'm sure you've probably heard it, too, was formative.³

Another positive experience within the institutional training environment was attending meetings of other faith groups and interacting with peers from other faith groups. Installation or unit-level training is often viewed as a “parade of faiths”⁴ with little emphasis on practical suggestions.

Participants said religious organizations that endorse them offer training and education focused on pastoral care, evangelism, preaching, and discipleship. Only three remembered training emphasizing comprehensive religious support in a pluralistic setting.

³ Interview with Kate, October 31, 2024.

⁴ Interview with Jonathan, October 30, 2024.

Several participants related the importance of mentoring relationships as formative experiences in understanding the role of chaplains in providing care for the entire population while remaining rooted in their respective faith practices and beliefs. (This will be discussed further under Shared Theme 3 – Leader Influence.)

These experiences and participant recommendations suggest that the Chaplain Corps would benefit from improving its approach toward religious pluralism. This would include reintroducing the World Religions Handbook, providing subject matter experts at the U.S. Army Institute for Religious Leadership, and reviewing installation or unit-level Chaplain Corps training for practical emphasis alongside content-based overviews. Another important item extrapolated from these interviews is that ongoing education and training is the responsibility of the Chaplain Corps, not the endorsing agents who represent a homogenous perspective.

Shared Theme 2 – Personal/Professional Tension

Each participant described an inherent tension associated with serving in the Army Chaplaincy, which is described in theological conflicts, role navigation, and institutional pressures. While several outlined transforming their outlooks on this tension, reserved for the sixth shared theme, this discussion focuses on the conceptual and structural concerns.

An internal tension exists between chaplains' personal theological views and the practical implications of providing religious support through curriculum, sacred texts, space for faith practices, and other resources. The participants articulated the nexus of this tension as theological from ontological claims of exclusivity. This tension is exacerbated by communicated priorities of endorsing agents focused on conversions and

presentations of their respective religious perspectives to religious others and nones.

Conversely, the institutional norms and expectations of the Army create a requirement for comprehensive religious support to a pluralistic population in a manner that communicates equal respect and support for all perspectives, be they religiously, spiritually, ethically, philosophically, or morally derived.

Within this environment, Army Chaplains navigate a tension related to roles: that of a religious leader representing a specific religious tradition and that of a religious support staff officer supporting each individual's free exercise of religion, even those opposed to one's religious tradition. The tension increases as one moves from supporting a theologically similar tradition to a markedly divergent one, e.g., a Nazarene supporting a Lutheran relative to a Nazarene supporting a Satanist. Understanding the differences between the two roles, that of a representative and that of a steward of resources provided by congressional appropriations, creates tension for the individual. Two other challenges within this role-derived tension are defining appropriate support for the religious other and questions about maintaining personal boundaries or seeking integration into a diverse team of similar theological perspectives.

Institutional pressures likewise increase this tension, as some reported being pressured to be less inclusive by more theologically conservative peers and vice versa. Within this context, participants experienced career-related implications, overtly or subtly, over their recommended accommodations or religious support requests.

This tension implies that the Chaplain Corps should learn to acknowledge the inherent tension or discomfort for initial entry chaplains and create conditions for appropriate dialogue and supportive mentoring relationships within the Chaplain Corps

grounded in respect and meaning-making as chaplains grapple with this tension. The Chaplain Corps can benefit from assisting chaplains in transitioning from seeing pluralistic support as a compromise to seeing it as enhancing the effectiveness of the individual and team and building the credibility and relevance of the Chaplain Corps. The Chaplain Corps should also recognize the enduring nature of this tension, necessitating iterative dialogue and sustainment to prevent atrophy or homeostatic rebalancing due to chapel service-based affinity grouping.

Shared Theme 3 – Leader Influence

Each participant discussed the importance of leader influence concerning senior chaplain impact, command influence, mentorship, and organizational climate. Senior chaplains who model flexible religious support and personal religious integrity empower junior chaplains to “lean in” and support the religious other while authentically representing their respective religious organizations. Meanwhile, resistant leaders create obstacles and encourage similar behavior among their subordinates. This dichotomous approach and outcome often form the catalyst for the resultant religious support climate within the organization. It is further challenged when rank forms the basis for resource-related conversations and religious support decisions. As one participant illustrated, a Captain is hard-pressed to advocate for resources when a Lieutenant Colonel is unfamiliar and unsympathetic to another style of worship or religious tradition.

Command influence was viewed as positive when the command was supportive and negative when the command was unsupportive or indifferent. In some instances, lack of command support created barriers, whereas most participants articulated overwhelming support. The principal impact seemed to be resources, either in the form of

time and funding or in prioritizing free exercise within the bounds of military necessity. When commands prioritized free exercise, manageable solutions or accommodations were actively sought and supported without negatively impacting the mission or the individual(s).

Participants also highlighted the importance of mentoring relationships early in their careers that positively impacted and shaped their approaches. These role models demonstrated the positive effects of pluralistic ministry on the individual requestors and the organization to which they belonged. Participants also noted the formative experience of negative examples by senior chaplains and the importance of ongoing guidance that affects continued development.

From an organizational perspective, the participants highlighted that leadership from the command and the Chaplain Corps sets the tone for religious support. Within this climate, rank potentially complicates religious prioritization conversations if the leader demonstrates unhealthy behaviors relative to supporting the free exercise of religion. If the climate is unhealthy or psychologically unsafe, career advancement concerns often negatively impact individual willingness to advocate for themselves or others. James highlighted the importance of empowering subordinates while setting expectations and demonstrating transparency and openness to dialogue.

The implications of this shared concern for the Chaplain Corps cannot be underestimated, given the role and function of supervisory chaplains in creating the appropriate climate for supporting the free exercise of religion. The Chaplain Corps should consider ongoing professional education, supervision, and assessment of the organizational climate created by supervisory chaplains.

Shared Theme 4 – Approaches to Support

Participants shared varied approaches to religious support, from proactively broad support to minimalist and responsive. The participants also emphasized building trust and developing professional approaches.

After conducting an in-depth demographic analysis, the proactively broad support approaches built resource tables or shelves reflecting a “Barnes and Noble style”⁵ approach. The minimalist approach provided “only what is required, and nothing more”⁶ for assigned personnel. In practice, this often provided Christian and limited Jewish resources. Service members were then required to request additional support. The rank differential was described as a potential barrier to requesting support. In the proactive approaches, the participants described positively surprised responses from junior and low-density faith group service members. In defense of the minimalist approach, the participant demonstrated the same limited material resourcing to service members of his religious tradition.

Participants emphasized the importance of building trust by listening and engaging service members with genuine curiosity that consistently demonstrated respect. Part of this required building a welcoming environment and emphasizing constructive conversations focused on understanding the function of beliefs in other people’s lives. This also led to building relationships across faith boundaries, intentionally focusing on practical support rather than theological debates.

⁵ Interview with Amy, November 05, 2024.

⁶ Interview with Michael, November 05, 2024.

.This shared theme also discussed the professional understanding of practicing chaplaincy in terms of understanding roles, role limitations, and boundaries. Developing an emphasis on facilitating access to resources and space counteracts an unhealthy focus on perceived endorsement that contradicts the underlying tensions described earlier. This shifts the focus to meeting needs while maintaining professional integrity.

.The implications for the Chaplain Corps involve articulating the processes for creating a demographic analysis and defining the religious support requirements in consultation with the supported population. It also requires examining how chapels and chaplain offices order, display, and distribute resources. Are displays relatively homogenous representations of the majority faith group to the exclusion of other faith groups? Are chapels neutralized between services and available for anyone to use for meditation or prayer without feeling out of place or unwelcome? Are chaplains actively communicating their availability and approachability to support all service members? What is the correlation between espoused Chaplain Corps values and demonstrated support of those values to the larger community?

Shared Theme 5 – Systemic Issues

.While most participants identified a highly supportive system for facilitating the free exercise of religion, participants identified four general systemic obstacles: doctrinal/policy challenges, resource issues, procedural challenges, and structural barriers.

.One participant highlighted a perception that religious support doctrine should be aligned under support doctrine rather than command and control doctrine. George argues that placing the Chaplain Corps doctrine under command and control relegates it to

unimportant and overlooked. In contrast, alignment under sustainment doctrine (historical alignment) maintains religious support as a priority for personnel services and, therefore, an item tracked as a commodity required for sustaining the force. From a policy perspective, several participants highlighted concerns over the religious accommodation procedures, e.g., the clarity of the process, the appropriateness of Christians assessing the sincerity of non-Christian requests, and the systemic inability to process requests promptly.

Several participants highlighted inconsistent resource allocations within installations, across faith groups, and relative to the chaplain's ranks or the faith community's size. Some argue that major religious groups or services are favored for resources, even if another group is numerically larger, and especially if the group's chaplain is junior in rank or a low-density religious group leader/chaplain. That said, several participants reported no such concerns about their experience.

Procedural challenges included concerns about a lack of standardized religious accommodation procedures, insufficient guidance and support systems for religious accommodation requests, limited coordination between units and the installation, and varied implementation processes that require relearning the new process at each installation.

Perceived structural barriers included gaps in communication between units and installation religious support offices, challenges coordinating resources across commands, limited integration with command systems, and inconsistent support for low-density faith groups. James' interview provided a positive view of these perceptions and outlined the processes he implemented to address these issues.

The implications of these systemic issues indicate the Chaplain Corps's challenges in implementing a process across a geographically dispersed branch assigned within subordinate organizations with divergent mission priorities and organizational structures. Given that these systems and procedures exist, the Chaplain Corps should consider re-implementing Command Inspection Programs and Staff Assistance Visits by subordinate Army Command and Corps Chaplain Sections with a centrally-approved checklist and training support packages. As part of the visits, there should also be a feedback process for process improvement.

Shared Theme 6 – Transformation of Understanding

This theme focuses on practical applications of transformative education to support operating in a pluralistic setting through initial transition, personal growth, and ongoing transformation.

Most participants related to the initial transition process upon entering the Chaplain Corps, where they shifted from resistance to acceptance of religious support in a pluralistic setting. This involved shifting from viewing support as a compromise to an essential enhancement of individual and organizational wellness in preparation for combat operations. While a few mentioned their initial military training impact on this transition, most discussed their transition as derived from learning through direct engagement with service members in real-world ministry settings. This practical engagement led to a transformed theological understanding built upon their pre-chaplaincy education without negatively impacting their theological identities.

The transformational understanding led to personal growth at home and within their respective religious communities. Previously untested assumptions and practices

were replaced by experientially informed theological questioning and reflection. In the process, theological others previously deemed threats and adversaries were now engaged as colleagues and friends.

A critical aspect of this transformation is the iterative nature of the process. Each reflected an awareness of continuous learning through new situations where their faith grew, and they learned how to adapt to interacting with different faith traditions. A common warning from several participants is to continue building on formative experiences to avoid regression to the mean. An example given is recent graduates of the Army Chaplain School returning to chapel services with like-minded religious leaders, losing the religiously diverse connections and perspectives gained during Chaplain School training. The result of this limited exposure is decreased religious empathy.

This shared theme for the Chaplain Corps implies understanding the importance of iterative learning and exposure to various faith group members in multiple settings. As members of relatively homogenous religious groups, decreased interactions with religious others naturally lead to decreased familiarity and connection. The continued cultivation of religious empathy and curious engagement is critical for chaplains to serve members of all faith groups and supervise chaplains from any faith group.

Conclusions Relative to Literature

The interpretation of findings by each of the six themes finds multiple intersections with the literature referenced in chapter two. While each shared theme demonstrated multiple intersections with the literature, the following discussion limits each to the most critical intersection(s) for each.

Shared Theme 1 – Education and Training

Education and training most notably intersect with Schein's emphasis on teaching the organizational culture to newcomers and the impact of individual agency on group affinity. Participants also raised issues related to adult learning and educational design.

Schein defines culture as

the pattern of basic assumptions that a given group has invented, discovered, or developed in learning to cope with its problems of external adaption and internal integration, and that have worked well enough to be considered valid, and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems.⁷

This definition clarifies that organizations have a culture and that new members must learn it. It likewise assumes that individuals come with preconceived cultures from other organizations and that these ways of doing things might conflict. Kate outlines the inculturation process for each religious organization and the potential conflict over competing underlying assumptions as chaplains join the Army:

It can sometimes make those things challenging in a pluralistic chaplain corps when there are folks who either overtly want things to go the way that they think they should go, or and I'm talking about from their theological perspective, or subconsciously think like a lot of things we do as human beings, we do it subconsciously, and we're not always tracking our motivations or even our behaviors that stem from those.⁸

Kate was building upon a prior statement where she referred to chaplains as ideologues, suggesting that chaplains join the military from relatively homogenous groups with their own culture and must integrate into the Army Chaplain Corps and adapt to its respective culture. Teaching culture requires considerable time, resources, and

⁷ Edgar H. Schein, "Coming to a New Awareness of Organizational Culture," *Sloan Management Review* 25, no. 2 (Winter 1984): 3.

⁸ Interview with Kate, October 31, 2024.

oversight by trusted members. Given the limited preparation provided by religious training institutions, chaplains face a profound transition when entering pluralistic environments where they must support and respect those they previously viewed as adversaries. This cultural shift demands extensive education, engagement opportunities, and reflective integration to help chaplains effectively operate in their new roles. The strength of Schein's approach to teaching culture in this setting rests in its emphasis on individual agency, where culture is a social construct. New members choose to join the group and subsequently accept the new culture through social affinity for the group and its culture or separate from the group. With several participants pointing to initial military training or their first duty station as a formative experience, Schein's emphasis on teaching newcomers the culture finds congruent emphasis.

Building upon Malcolm Knowles's ideas about working with adult learners, Susan Imel examines the theory and practice of adult learning within groups, noting that "adult education's connections to the group dynamics tradition has meant...adult educators tend to focus on helping learners work effectively together rather than on helping them understand the learning processes that may be occurring in the group."⁹ Two significant practical implications related to the participants' experiences and recommendations are the role of facilitators in cooperative learning groups, where they "develop exercises and activities and manage[sic] time and resources,"¹⁰ and structuring the groups based upon expectations of the learning outcomes. For education on

⁹ Susan Imel, "Using Groups in Adult Learning: Theory and Practice," *The Journal of Continuing Education in the Health Professions* 19, no. 1 (1999), 55.

¹⁰ Imel, "Using Groups in Adult Learning, 57.

facilitating the free exercise of religion in a pluralistic setting, several participants recommended more practical engagement and division of the learners by enlisted or commissioned officer status, noting the educational background and divergent pragmatic focal points. Self-directed learning is another critical factor in education and training, as only a few participants mentioned. Sharan Merriam outlines a brief history of adult learning, emphasizing self-directed learning with three goals: developing “the learner’s capacity to be self-directed...transformational learning...[and] emancipatory learning and social action.”¹¹ An emphasis on empowering and supporting self-directed learning seems appropriate for this topic. While Sharan Merriam’s emphasis on social action might seem misaligned with military chaplaincy due to its placement within a hierarchical organization, the role of chaplains as advocates and supporters of the free exercise of religion requires social action in the form of advocacy and proactive support. Michael offers that the lack of education creates challenges in effective advocacy:

It's not just writing the memo, but it sounds like then also at the advocacy and education on behalf of the process. It's also a challenge because you're trying to argue a position that isn't your position and kind of on unstable ground trying to make an argument on behalf of the other. When you want to support the free exercise, but you yourself are not, or you don't share the common ground, to be able to make the make a solid argument, if that makes sense..¹²

¹¹ Sharan Merriam, “Andragogy and Self-Directed Learning: Pillars of Adult Learning Theory,” *New Directions for Adult and Continuing Education* 89, no. 1 (Spring 2001), 9.

¹² Interview with Michael, November 05, 2024.

Shared Theme 2 – Personal/Professional Tension

The personal/professional tension is best understood through Schein's three-tiered organizational culture framework and Weick's work on sensemaking and sensegiving.¹³

Schein's three-tier framework provides a means of understanding where the artifacts and espoused values comprise the tangible aspects of culture, and underlying assumptions comprise the conceptual understanding of organizational culture that drives decision-making, problem-solving, and organizational behavior. The underlying assumptions articulated by participants demonstrated a conceptual tension around identity, values, exclusive religious claims, and institutional requirements. Schein's framework likewise provides a lens for viewing organizations like the Chaplain Corps, recognizing that there are espoused values "that are rationalizations or only aspirations for the future."¹⁴ The challenge for leaders and individuals is the conceptual work of sensemaking¹⁵ and sensegiving.

Most participants describe a tension between what they believe and practice in their respective religious traditions and the expectations of the government as they enter the Army, which is characterized by pluralism. Jonathan articulates the process, "I was interpreting pluralism and operating in ministering in a pluralistic environment as having

¹³ Karl E. Weick, Kathleen M. Sutcliffe, and David Obstfeld, "Organizing and the Process of Sensemaking," *Organization Science* 16, no. 4 (July-August 2005), 409-421.

¹⁴ Schein, *Organizations*, 20.

¹⁵ Karl E. Weick, Kathleen M. Sutcliffe, and David Obstfeld, "Organizing and the Process of Sensemaking," *Organization Science* 16, no. 4 (July-August 2005), 415.

to be all things to all people without retaining any individual theological position, almost as if I had to forfeit everything and become, by default, nothing.”¹⁶ Joshua describes the tension resolution as, “The government has entrusted me with the operations of the building, but it’s not mine. I’m not giving them anything, just facilitating it. I am less than comfortable doing it, but externally, there would be no difference in my support.”¹⁷ Jonathan and Joshua are engaging in sensemaking. Karl Weick offers that “explicit efforts at sensemaking tend to occur when the current state of the world is perceived to be different from the expected state of the world.”¹⁸ As chaplains enter the Army, they adopt a new identity and role within an organization where inherent tension leads to questions of maintaining religious integrity while faithfully fulfilling the requirements to support all assigned personnel. Sensemaking, as an iterative framework, can facilitate this process.

Karl Weick’s sensemaking theory posits itself as the socially derived process by which individuals and organizations build a comprehensive understanding through words and categories, in written and spoken texts, through iterative processes as leaders or members of an organization seeking to shape normative organizational conduct. Adrianna Kezar¹⁹ builds upon Weick’s theory; individuals look for meaning, significance, and

¹⁶ Interview with Jonathan, October 30, 2024.

¹⁷ Interview with Joshua, October 31, 2024.

¹⁸ Karl E. Weick, Kathleen M. Sutcliffe, and David Obstfeld, “Organizing and the Process of Sensemaking,” *Organization Science* 16, no. 4 (July-August 2005), 409.

¹⁹ Adrianna Kezar, “Understanding Sensemaking/Sensegiving in Transformational Change Processes from the Bottom Up,” *High Educ*, no. 65 (2012): 762-763, <https://doi.org/10.1007/s10734-012-9575-7>.

connection in the workplace. This means any change in approach or practice requires individual and collective connections that legitimize change through new heuristics that align with individual and collective understandings of the past, congruence with the present, and connection with a promising future.

For Chaplains, adopting a new role or identity as a steward of government resources for a pluralistic population is challenging. James articulates this sensemaking process and highlights the importance of leaders creating space for sensemaking by subordinates. In so doing, the leader engages in sensegiving through trust and respectful dialogue:

What is the government's role in all of this? And for those who, I think sometimes, the education process is, you got to somewhat separate; I have to kind of have a split personality. Like, what's my role as a Christian pastor and what is my role as a government functionary? And that is both in the overseeing of religious support programs part...we're motivated by our service to God and country and all that. But at the end of the day, just government functionary stuff, people need to go places and fill needs and we have people that do that. And so in my mind, there's some things, it's the over spiritualizing function that causes us challenges and then we need to be honest and discuss this. This is the world we're in, and we don't have to necessarily agree. But you gotta agree that the government owes our people something, and we are agents of that government. So that's kind of how I shaped it. I think the honesty part, people are receptive once you like, when you just speak freely and frankly in groups. I think people are, you know, it's always a tension. There's a tension between those two dynamics all the time, and that's where we always live. And I would propose that if we don't feel the tension. From whatever faith tradition we're in, if we don't feel the tension, that's probably either because we're naive or we've compromised. Because we should have a tension between that. I think it's inherent in the system.²⁰

²⁰ Interview with James, November 12, 2024.

Framing the navigation of this inherent tension within the framework of sensemaking, at the individual and collective level, provides a helpful heuristic for successful navigation of tension for chaplains at all phases of their respective careers.

Within the personal/professional tension of roles, identity, and service in a pluralistic setting, education and training should account for sensemaking and sensegiving as part of an iterative process in a dynamic and shifting environment across chaplains' professional lifecycles.

Shared Theme 3 – Leader Influence

The influence of leaders figured prominently across the participants' responses, with positive and negative impacts. The primary intersections with literature were Edmondson's discussion of psychological safety in dialogue, Chern's principles of STS design, and mentoring relationships.

Whether it is creating healthy mentoring relationships, engaging in sensegiving, or conducting lifelong learning within a field of certified professionals with highly divergent ontological perspectives, "if the leader is supportive, coaching-oriented, and has non-defensive responses to questions and challenges, members are likely to conclude that the team constitutes a safe environment."²¹ This explains James' approach and encouraged Lewis and Jonathan to embrace broader facilitation of the free exercise of support. Lionel highlighted the impact of his first supervisory chaplain on his commitment to advocacy and support:

²¹ Amy Edmondson, "Psychological Safety and Learning Behavior in Work Teams," *Administrative Science Quarterly* 44, (1999): 356.

His professionalism really helped me to see my role in making sure I took care of others too. And so then when I have a soldier come to me, and they were, whether they're Muslim or whether they're Norse or whether they were 7th Day Adventist had a couple and they asked, I realized that me fighting for their values was incredibly important because of the way I felt when he was fighting for mine. And so I really made it a priority and said I will fight.²²

Dialogue is central to influential leadership, mentoring, and sensemaking.

Kaplan's discussion of the means of communication in framing contests²³ and Simoes and Esposito's discussion of authentic dialogue put the participants at the center. Genuine dialogue is when participants feel respected and heard; they have a voice in the process.²⁴ Healthy dialogue leads to decreased resistance to change and increased sensemaking by the employees with increased opportunity for sensegiving by the managers. James offers that this requires leaders willing to create an environment where differences are discussed in an open forum characterized by respect for the differences, "I think the honesty part, people are receptive once you like, when you just speak freely and frankly in groups."²⁵

As Lewis shared, this influence takes place informally and formally through examples or directed professional development:

I had early experiences in the National Guard a long time before I became a chaplain, which gave me the impression that chaplains were supposed to be oriented around showing interest around everyone's spiritual concerns and needs, more of a listening stance. That the role of the chaplain was more of one who helps other people process their own values and live up to their own values. More

²² Interview with Lionel, October 30, 2024.

²³ Sarah Kaplan, "Framing Contests: Strategy Making Under Uncertainty," *Organization Science* 19, no. 5 (2008): 733.

²⁴ Paula Simoes, Matos Marques, and Mark Esposito, "Improving Change Management: How Communication Nature Influences Resistance to Change," *Journal of Management Development* 33, no. 4 (2014): 329.

²⁵ Interview with James, November 12, 2024.

than trying to commandeering conversations or experiences to promote their own ideals.

Within the first assignment on active duty as I served under [sic]. He was my group chaplain. And again, he modeled, but he also celebrated an educated approach to world religions. And the Army, in that case, the Special Operations unit operating all over the world depended upon us as chaplains to have a kind of academic or pluralistic interest in the locals...and so, he appreciated and commended me and other people for paying attention to what's different between religious groups..²⁶

Lewis's experience illustrates the ninth principle of Chern's nine principles of STS design. The ninth principle is supporting congruence through actions reinforcing desired behaviors. This principle ensures that leaders' actions align with organizational values and priorities..²⁷ Participants' experiences of supervisory chaplains modeling appropriate support and openness to dialogue demonstrate the importance of supporting congruence.

In addition to formal leader influence, mentoring relationships provided a significant formative relationship for several participants' understanding of their professional identity and subsequent perceptions of acceptance into the Chaplain Corps and commitment to emulating the same support and advocacy for the religious others. Venkataraman et al. outline the importance of mentoring with a longitudinal study that examines the impact of competency-based approaches to mentoring on professional identity formation. The resultant outcomes, although focused on competencies, included changes in values, beliefs, and principles that positively informed the mentees'

²⁶ Interview with Lewis, October 28, 2024.

²⁷ Albert B. Cherns, "Principles of Socio-Technical Design," *Human Relations* 29, (1976): 785-792.

professional identity relative to stakeholders' desires.²⁸ For the Chaplain Corps, informal mentoring demonstrates positive potential for increased practice.

Shared Theme 4 – Approaches to Support

The research showed how support systems relate to two key theories: Open Systems Theory (which focuses on external adaptation) and Socio-Technical Systems theory (which balances organizations' social and technical aspects).

Amy describes two successful approaches to providing religious support, one centered on demographic analysis for resources and the other informed by temporally aware advisement and support.

I would scrub that list [unit personnel roster] and see and make sure there was something for everyone if possible in the office. Even atheists. And I did not have a lot, but I did have an atheist textbook in there. Apparently, one of ours was a First Lieutenant. He saw that and was excited to see that book. So, apparently it was good. So I mean that you know what it did was it makes them more willing to come to you and trust you as someone who just genuinely cares about them, not someone who's just there to sway them into their own faith.

We had a field exercise, and it was on Easter, so of course, the command and everyone decided to move it, but the date they moved it to fell on Ramadan, and I think I might have shared this with you. Long story short, there wasn't a plan in place for soldiers who were fasting. To either come out of the fields when they break their fast or have lighter duties. Or it just wasn't well organized. I mean, not to say you could never do a field exercise in Ramadan, but you know, at least you were intentional about accommodating those soldiers, and it wasn't.²⁹

In the second account, Amy describes purchasing Halal MREs from a private vendor and committing to proactively planning and advising as part of the unit's staff. Amy's proactive approach to religious support is driven by demographic analysis and a

²⁸ Vaishnavi Venktaramana, et al., "Understanding Mentoring Relationships Between Mentees, Peer and Senior Mentors," *BMC. Medical Education* 23, no. 26 (2023), 7-8.

²⁹ Interview with Amy, November 05, 2024.

welcoming approach where everyone is respected, valued, and supported. This demonstrates Open Systems Theory's emphasis on remaining relevant and providing products or services based upon external stimuli. These shifting external stimuli necessitate modification of the acquisition process to increase the spectrum of available resources to match perceived environmental demands..³⁰ As religious demographics shift, the Chaplain Corps must increase its interactions with service members, civilian religious organizations, and subject matter experts. Through these enhanced connections, chaplains can better understand emerging needs, expand recruiting foci, acquire appropriate supplies, and develop religious support programs that respond to changing requirements and environmental feedback – reflecting the interdependence indicative of open systems. The feedback mentioned by James' discussion of assessing available on-post and off-post resources ensures both relevance and sustainability of the organization as it supports multiple external demands for religious support.

Michael proposes a different approach to providing material support to service members and their dependents:

I think, ultimately, the onus is on the individual and the soldier to requisition that [religious publications], so that's kind of the way I read that question. Sir, it is probably more logistical in nature, but also with my faith group, I'm not gonna actively, you know, I guess evangelize, you know, with other groups' material. But I've been sent, I've been deployed, and I've been sent any number of items, and I've always made those available in Chapels. But on the person, let's just say for that, I'm not gonna, obviously, I'm not gonna carry those other materials with me..³¹

³⁰ Mary Jo Hatch, *Organization Theory: Modern, Symbolic, and Postmodern Perspectives* (Oxford: Oxford University Press, 2018), 132-133.

³¹ Interview with Michael, November 05, 2024.

Michael demonstrates the interdependence within systems where the technical aspects of religious support - including facilities, equipment, material resources, and procedures - create demands on the social system. These demands affect chaplains who act as resource stewards and impact the working relationships between chaplains, religious affairs specialists, and those they serve. Michael views acquiring and distributing religious material as a logistical (technical system) and a theological (social system) challenge. Michael addresses his experience of tension in both systems by limiting proactive acquisition or increasing the distribution of materials that contradict his faith tradition. While Amy focused on external stimuli, Michael focused on issues of internal homeostasis.

From an Open Systems Theory perspective, as religious curricula, meals, or space utilizations increase for one group, a corresponding decrease is required from other groups to offset demands from limited resources. The subsequent internal reprioritization of the distribution of resources either positively or negatively impacts each group with ontological exclusivity claims that create potential friction points. This interdependency within the two aspects of the system requires leader engagement to seek co-optimization that ensures relative homeostasis of the overall system through clear identification of goals and standards of religious support delivery relative to environmental factors like access to external support and relative freedom of movement by individuals or collective faith groups. The disparity between Amy's and Michael's approaches suggests that the Chaplain Corps requires clearly defined standards of expected logistical support for assigned personnel and their dependents.

Shared Theme 5 – Systemic Issues

With systemic issues including perceptions of doctrinal misalignment, lack of access to resources, confusion over standardization of processes, and perceived structural barriers, the literature intersections range from Max Weber's work on bureaucracy³² to Elliott Jaques's Stratified Systems Theory³³ to the complexities associated with communicating effectively through nested STSs within a larger STS.

Max Weber's work on bureaucracy emphasizes standardized processes through written policies, establishing a hierarchy with graded authority levels to supervise subordinate levels, and understanding positional duties as vocational responsibilities with inherent devotion to the organization's "culture-values."³⁴ This requires leaders or managers to embody the values personally and then inculcate and enforce adherence to those values across subordinate levels of the organization.

The participants referenced the hierarchical nature of the Chaplain Corps and the expected responsibilities of commanders and chaplains in support of organizational values. James, in particular, discussed integrating priorities and tasks within the command relationship order, providing bureaucratic authority to coordinate support: "But we gotta create the systems that allow that to happen...in our command relationship order...we added that every unit in the [sic] is in a general support reinforcing

³² Jay M. Shafritz, and J. Steven Ott, *Classics of Organization Theory*, 5th ed. (Orlando: Harcourt College Publishers, 2001). Chapter 7.

³³ Elliott Jaques, *Requisite Organization*, (Arlington: Cason Hall & Co., 1996), 93-97.

³⁴ Jay M. Shafritz, and J. Steven Ott, *Classics of Organization Theory*, 5th ed. (Orlando: Harcourt College Publishers, 2001). Chapter 7.

relationship...that's the legal authority for things to make that happen.”³⁵ In a similar approach, Luther Gulick³⁶ outlines the division of labor and span of control, another critical aspect raised in the interviews regarding exercising oversight and conducting appropriate reviews and assessments of lower echelons, notably in a negative example by Michael:

The brand new chaplain who just assessed shows up to his installation and, you know, is confronted with this. They have no clue. And again, we always go back and say, it's a brigade chaplain's responsibility, and I get that. But there are those. There's one here who doesn't really have that oversight, and you know he's, you know, the senior chaplain here has made arrangements for him to be covered. But still, It's wow. Imagine if we had a POC that he would just reach out to...He falls up under a brigade chaplain who is actually pulling on his own boots. And he is a first Lieutenant, a brand-new chaplain. And he is essentially a stepchild. I think he gets left out. He just doesn't have that, you know that day-to-day oversight that perhaps would be very beneficial.³⁷

Elliott Jaques addresses the processes of prescribing accountability and authority with subsequent discussions about the distance from a manager to a subordinate and issues related to functional capability and process management.³⁸ Michael's and other participants' concerns regarding the lack of standard procedures, access to supervisory advisement, the ability to request assistance, and staffing delays suggest that an analysis of the span of control and distance from the management level with appropriate authority to decide or advise is lacking.

³⁵ Interview with James, November 12, 2024.

³⁶ Jay M. Shafritz, and J. Steven Ott, *Classics of Organization Theory*, 5th ed. (Orlando: Harcourt College Publishers, 2001). Chapter 8.

³⁷ Interview with Michael, November 05, 2024.

³⁸ Elliott Jaques, *Requisite Organization*, (Arlington: Cason Hall & Co., 1996), 93-97.

Shared Theme 6 – Transformation of Understanding

Transformation of understanding intersects with multiple areas of the literature, most notably Action Research's emphasis on motivating and empowering subordinates' active participation in learning as an iterative process. As Cameron and Quinn's Competing Values Framework posits, this individual change is necessary for organizational change.

Jonathan describes his initial resistance to change in CHOBC after viewing any change as compromising his faith. He then outlines undergoing a seismic shift while deployed:

The seismic shift started began during the deployment. I went to Iraq, and honestly, It began with my fellow chaplains, where, at that time, I was still of the mindset of secondary separation and thinking if you didn't go to the same school, then everything is at stake. We are not the same flavor denomination, training, and mentality, and everybody else has compromised the truth, and I need to keep a distance. Well, that's a little bit harder to do in a deployed setting. And as I was interacting with other chaplains of other denominations, I know it sounds silly, but I started looking to my left and right going. Wait a minute! They are way more godly than I am. They love the Lord Way more than I do. And it was a sweet gift from God that I started interacting with my colleagues, and seeing their lives, and their dedication, and their selfless service, and the way they lived out their calling. It profoundly impacted me and caused me to go back to the book and examine what I was doing. What do I really believe and why?

Jonathan essentially describes what Kurt Lewin refers to as the unfreezing stage of organizational change.³⁹ Within this model, Lewin's identification of gatekeepers, where leaders "determine whose psychology has to be studied, who has to be educated if a change is to be accomplished,"⁴⁰ provides a framework for conceptualizing chaplains

³⁹ Kurt Lewin, *Field Theory in Social Science* (New York: Harper & Row, 1951), 228-229.

⁴⁰ Kurt Lewin, "Frontiers in Group Dynamics: Channels of Group Life; Social Planning and Action Research," *Human Relations* 1, no. 2 (1947): 146.

as gatekeepers for the free exercise of religion. As gatekeepers, chaplains require iterative cycles of Lewin's three stages of change to transform understanding in support of the organization and its members. The unfreezing stage disrupts existing knowledge structures through cognitive dissonance and challenges to prior assumptions. For several participants, this started in the Chaplain Basic Officer Leader Course or at their first duty station. Individuals encounter and integrate new information during the changing phase through experimentation and learning.⁴¹ For Jonathan, this initially took root during his first deployment. Finally, refreezing occurs as new understanding becomes stabilized and internalized into the person's cognitive framework.⁴²

While presented as linear, the change process often operates iteratively, with individuals cycling through stages multiple times as they encounter new challenges or insights. This recursive pattern allows for deeper integration of learning as people repeatedly unfreeze their understanding, incorporate new perspectives, and stabilize their transformed knowledge structures.⁴³ The iterative nature of change acknowledges that transformation of understanding is rarely a one-time event but rather an ongoing process of growth and adaptation.⁴⁴ For chaplains, this iterative nature accompanies requirements to supervise, mentor, and resource an increasingly more religiously diverse population.

⁴¹ Bernard Burnes, "Kurt Lewin and the Planned Approach to Change: A Re-appraisal," *Journal of Management Studies* 41, no. 6 (2004): 998.

⁴² Stephen Cummings, Todd Bridgman, and Kenneth G. Brown, "Unfreezing Change as Three Steps: Rethinking Kurt Lewin's Legacy for Change Management," *Human Relations* 69, no. 1 (2016): 37.

⁴³ David Coghlan and Nicholas S. Rashford, *Organizational Change and Strategy* (London: Routledge, 2006), 73-75.

⁴⁴ Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization* (New York: Doubleday, 2006), Kindle, 57-58.

Kim S. Cameron and Robert Quinn outline the Competing Values Framework for assessing organizational culture and reinforce the understanding that individual change is a necessary precursor to organizational change, noting that “unless the change process becomes personalized, individuals are willing to engage in new behaviors, and the managerial competencies demonstrated in the organization are altered, the organization’s fundamental culture will not change.”⁴⁵ In conjunction with the transformation of individual outlook, Cameron and Quinn argue that leader influence (third shared theme) plays a significant role in facilitating this process through critical managerial competencies associated with the four identified culture types. Lewis’ experience demonstrates the criticality of leader competencies for facilitating this understanding transformation: “I would say that initially, going to the Chaplain Basic Course was somewhat troubling in the sense that the commandant at the time seemed disturbed, very seemingly unable to model that himself. But, the Instructors were doing it well.”⁴⁶

Leaders are well advised to consider aligning the individual or team's needs with the mentor or facilitator's demonstrated competencies to address initial and iterative cycles of outlook transformation.⁴⁷ Quinn and Rohrbaugh propose that balanced approaches across all four quadrants of the CVF benefit the organization and individuals

⁴⁵ Kim S. Cameron and Robert E. Quinn, *Diagnosing and Changing Organizational Culture: Based on the Competing Values Framework*, 3rd ed. (Hoboken: John Wiley and Sons, 2011), Kindle, 165.

⁴⁶ Interview with Lewis, October 28, 2024.

⁴⁷ Cameron and Quinn provide a useful tool for assessing the critical managerial competencies required for various organizations and organizational life-cycles while noting that well developed managers recognize the complexity of operating within all four quadrants simultaneously despite demonstrating a preponderance of one particular culture type. Kim S. Cameron and Robert E. Quinn, *Diagnosing and Changing Organizational Culture: Based on the Competing Values Framework*, 3rd ed. (Hoboken: John Wiley and Sons, 2011), Kindle, 166-171.

as this approach respects the inherent dialectical tension between the four approaches, thus demonstrating mimetic congruence with the individuals navigating this transformation of understanding.⁴⁸

Summary of Conclusions

The six themes address critical issues related to the organizational culture and professional development of the Chaplain Corps. While the literature review for this research examined Open Systems Theory, Action Research, and Edgar Schein's assessment framework for organizational culture, participant interviews demonstrated increased opportunities for engaging literature from adult learning theory, mentorship, and multiple organization design approaches.

Education and Training align with Schein's emphasis on teaching organizational culture to newcomers and adult learning principles. Personal/Professional Tension connects Schein's three-tiered framework and Weick's sensemaking theory. Leader Influence relates to Edmondson's work on psychological safety and mentoring relationships. Approaches to Support intersects with Open Systems Theory and Socio-Technical Systems (STS) theory regarding external adaptation and internal co-optimization. Systemic Issues align with Weber's bureaucracy theory and Jaques's Stratified Systems Theory, addressing standardization and hierarchical challenges. Finally, Transformation of Understanding connects with Action Research and Cameron and Quinn's Competing Values Framework, emphasizing the necessity of individual

⁴⁸ Robert E. Quinn and John Rohrbaugh, "A Spatial Model of Effectiveness Criteria: Towards a Competing Values Approach to Organizational Analysis," *Management Society* 29, no. 3 (1983): 375.

change for organizational transformation. It is also noted that each shared theme is interdependent with the others.

Discussion of Implications

This study's findings and interpretations, exploring the lived experiences of chaplains facilitating the free exercise of religion, led to practical and conceptual implications for practice, leadership, and future research suggesting that the Army Chaplain Corps requires a refined comprehensive approach to improving the facilitation of the free exercise of religion balancing individual religious integrity with institutional requirements for operating in a pluralistic environment.

Implications for Practice

Practical implications of this study include improved communication of the standardized processes for religious accommodations, potential republication of the world religions handbook, and consideration of increasing access to subject matter experts on world religions and the religious accommodations process. The participant interviews also highlighted the importance of assessing the process of defining whether a burden to free exercise exists or has been reasonably removed. This definition of the burden and relief of the burden belongs to the individual adherent, and assessment requires direct engagement in an environment characterized by trust and respect. Another practical implication requiring significant attention is improved interfaith training with practical engagement opportunities and a focus on expanding awareness, individual preparedness, and willingness to provide appropriate support.

Implications for Leadership

Leadership implications of this study include emphasizing the importance of modeling inclusive religious support while maintaining religious integrity, creating psychologically safe environments for religious dialogue where leaders demonstrate healthy emotional management and transparency, strengthening informal mentorship programs, and prioritizing reviews and assessments of subordinate level chaplain sections' systems and approaches to facilitating the free exercise of religion.

Implications for Research

As a novel approach, this paper makes several key contributions to the body of literature. First, it expands on research on organizational culture in religious institutions, particularly examining how religious professionals navigate pluralistic environments while maintaining authentic religious integrity. Second, it applies Brinkerhoff's Success Case Method in a novel context (Army Chaplain Corps), demonstrating its utility for studying organizational culture in hierarchical institutions. Third, it integrates multiple theoretical frameworks (socio-technical systems theory, open systems theory, action research, and Schein's organizational culture framework) to understand religious support in complex organizations. Fourth, it provides empirical evidence of how leadership influences religious accommodation in diverse settings, adding to the literature on psychological safety and organizational change. Fifth, it contributes to understanding professional identity development among religious leaders in secular institutions. Sixth, it fills a gap in military chaplaincy by providing the first peer-reviewed research on applying organizational design theories to the U.S. Army Chaplain Corps. Last, it offers insights into iterative professional development in contexts requiring enduring worldview

transformation. In summary, the study's mixed methods approach and focus on lived experiences provide rich data for understanding how religious professionals balance personal convictions with institutional requirements in pluralistic settings.

Future Research

Potential future research could examine different or expanded populations, evaluate the effectiveness of specific interventions, conduct longitudinal studies, assess standardizations and implementations, and examine demographic and cultural factors.

The limited population of this study leaves open the need to study the same experiences within the Army Reserve or National Guard, religious affairs specialists within each of the three components, directors of religious education, unit commanders, and the service members and authorized dependents receiving religious support. Another area for more focused study and potential comparative analysis would be rank and time in grade-stratified studies.

The perception of limited pre-chaplaincy education or training suggests that a focused study examining one or several pre-chaplaincy training programs from several religious academies or universities might be beneficial. Along the same lines, studies researching the effectiveness of initial military training, ongoing professional development, and self-development on the facilitation of the free exercise of religion would be beneficial and add to the understanding of effective approaches.

Longitudinal studies on chaplains' outlook transformation, the impact of mentoring, and the effectiveness of the Chief of Chaplain's directed change initiatives on facilitating the free exercise of religion could provide valuable insight.

Concerns regarding standardization of processes and access to resources suggest that assessment of the religious accommodation process, resource allocation systems and approaches, and structural or organizational barriers to communication between unit and installation religious support teams are worthy research concerns.

Given shifting religious demographics and articulated concerns about support for low-density faith groups, studies assessing the impact of chaplain demographics on religious support, cultural or religious barriers to inclusive religious support, or leadership styles that promote welcome and psychological safety are also promising.

Summary and Concluding Remarks

This study was a novel approach examining the lived experiences of U.S. Army chaplains facilitating religious free exercise through a mixed-methods approach using Brinkerhoff's Success Case Method. The research revealed six major themes: gaps in education and training, the tension between personal faith and professional duties, the crucial impact of leadership, the importance of proactive support approaches, systemic challenges, and the transformation of understanding through experience.

Through quantitative surveys and subsequent qualitative interviews, the study found that successful facilitation of religious free exercise requires comprehensive education, psychologically safe environments for dialogue, standardized processes, and intentional leadership development. The research highlighted how chaplains navigate supporting diverse faiths while maintaining religious integrity, often experiencing significant personal and professional transformation through direct engagement with service members.

The findings suggest that the Army Chaplain Corps needs to refine its comprehensive approach to improving religious support delivery that balances individual religious convictions with institutional requirements for pluralistic ministry. This includes enhancing pre-chaplaincy and ongoing professional education, strengthening mentorship programs, standardizing accommodation processes, and creating conditions for constructive dialogue about religious support in diverse settings.

Future research opportunities include examining the perspectives of other stakeholders like commanders and service members, evaluating the effectiveness of training interventions, conducting longitudinal studies on chaplain development, and assessing the standardization of religious support processes across installations. The study contributes to understanding how religious professionals support diverse faiths while maintaining authentic religious identity in pluralistic settings.

APPENDICES

APPENDIX A

Quantitative Instrument

ARMY SURVEY CONTROL NUMBER: **AAES-RMC-23-082**

AGENCY IDENTIFIER: Academic

Expiration Date: 03/16/24

Please use the scale below to signify your perception of current practices or prior experience with the statements.

Scale

1. Strongly Disagree
 2. Slightly Disagree
 3. Neither Agree nor Disagree
 4. Slightly Agree
 5. Strongly Agree
-
1. I am comfortable providing ethical or moral counseling for non-religious military community members.
 2. I am comfortable referring military community members to other chaplains or civilian faith communities.
 3. I am comfortable providing religious material to military community members contradicting my faith perspective.
 4. I will actively advocate for resources (space, material, and time) for religious traditions that contradict my faith perspective.
 5. I am committed to supporting religious and non-religious service members, dependents, and authorized civilians.
 6. Supporting the Free Exercise of religion is a primary function of the Chaplain Corps.
 7. Providing non-religious counseling is the responsibility of chaplains.
 8. I have experienced supervisory chaplains committed to the free exercise of religion by all faith groups.
 9. I have experienced peers committed to the free exercise of religion by all faith groups.
 10. Chaplains of different faith groups freely share products and assist one another.
 11. My civilian education prepared me to support the free exercise of religion in the Army.
 12. My military training and education increased my commitment to supporting the free exercise of religion in the Army.

13. Policy, regulation, and doctrine increase my understanding of facilitating the free exercise of religion in a pluralistic setting.
14. Local religious support training increases my understanding of facilitating the free exercise of religion in a pluralistic setting.
15. My endorsing agent provides training that increases my understanding of facilitating the free exercise of religion in a pluralistic setting.

Demographic Data:

1. What is your rank? [Drop down menu]
2. What is your gender? [Drop down menu]
3. Who is your endorsing agent? [50-character free text entry]

Interview Participation:

If you are willing to participate in a follow-on interview regarding this topic and your experience/observations, please provide your email and a preferred phone number for the researcher to contact you. (A follow-on Interview is strictly voluntary as well, pseudonyms will be applied, and it will take approximately 30-45 minutes.)

Email: _____

Phone Number: _____

APPENDIX B

Guided Interview Questions

The guided interview questions, grouped by the SCM bucket methodology, are:¹

1. (What was Used Bucket) What practices have you employed or witnessed that indicate a strong commitment/reluctance to support the free exercise of religion within your unit or installation?
2. (Results Bucket) What changed, who noticed, and how did you receive the feedback?
3. (Value Bucket)
 - a. How are these results significant for the Army Chaplain Corps?
 - b. How does this approach help the larger community?
 - c. How does this approach help the Army Chaplain Corps fulfill its assigned role within the Army?
4. (Help Bucket)
 - a. Were there incentives or obstacles to adopting this approach?
 - b. What tools, references, or other resources were used?
5. (Suggestions Bucket) What specific practices at this installation should other locations consider implementing or incorporating into their current practices to be more inclusive and comprehensive?
6. Request a copy of the artifacts: Religious Support Schedule, Training Calendar, and Religious Referral Agencies (on and off-post)

¹ Questions created based upon Adapted Impact Model from Brinkerhoff, *Success*, Chapter 6.

APPENDIX C

Institutional Review Board Clearance and Informed Consent

INFORMED CONSENT FORM

--- Assessing Free Exercise Attitudes Among Army Chaplains---

You are invited to participate in a research study to assess attitudes, behaviors, and education/training on facilitating the free exercise of religion in the military community by active-duty Army Chaplains. Your candid responses provide no risk to yourself but help us gain greater clarity of attitudes, behaviors, and education/training on a vital topic for my research. Your data will be anonymously reported and kept confidential, with no attempts to re-identify your identity.

This study is conducted by Geoff Bailey, a Ph.D. candidate at Anderson University, under the supervision of Dr. Kyle Small. You were selected as a possible participant because you are an active-duty Army Chaplain.

If you decide to participate, we ask that you complete a brief survey with Likert-scale responses and indicate your willingness to participate in a follow-on interview. We anticipate the survey will take approximately 10-15 minutes of your time. If you are willing to participate in a follow-on interview, please annotate as such after the survey and include a preferred email address and phone number.

Disclosure of demographic data might create concerns regarding the reidentification of respondents, especially low-density groups. We will utilize the aggregate to maintain anonymity, cross-referencing various internal strata to guarantee the highest level of anonymity. (E.g., aggregating female responses across ranks or grouping religious organizations into general categories like “Protestant,” “low-density,” etc., to maximize anonymity.)

While there are no direct benefits for participation in this study, like financial rewards or gift cards, your participation will positively impact the researcher’s ability to understand perceptions across ranks, genders, and faith groups in a manner that helps us understand potential impacts on both facilitating the free exercise of religion and education and leadership related to facilitating the free exercise of religion.

Any information obtained in connection with this study that can be identified with you will remain anonymous. Data collected through participation may be used to fulfill an educational requirement at Anderson University. None of your identifiable information will be included.

Participants may withdraw from participation at any time, without penalty, and may withdraw any data which has been collected about themselves, as long as that data is identifiable.

Your decision whether or not to participate will not jeopardize your future relations with Anderson University, the United States Army Chaplain Corps, or the United States Army.

The DoD will have access for inspection and copying any records documenting compliance or noncompliance with DoDI 3216.02.

If you have any questions, Geoff Bailey, gbailey103@andersonuniveristy.edu, [REDACTED], or Dr. Kyle Small, ksmall@andersonuniversity.edu, [REDACTED] will be happy to answer them. You may print a copy of this screen for your records.

For more information regarding your rights as a research participant, you may contact the Co-Chairs of the Institutional Review Board by phone or email. The HSC Co-Chairs, Dr. Joni Criswell, and Dr. Robert Franklin, can be reached at [REDACTED] or by email at hsc@andersonuniversity.edu.

Please click on the following link to signify your consent and to participate in the survey.
https://anderson.qualtrics.com/jfe/form/SV_3eEWrtbM4V8ggWa

APPENDIX D

Survey Participant Request Letters

All active-duty chaplains will receive the following email forwarded from the Army Chief of Chaplains Office on behalf of Geoff Bailey.

Chaplain Corps Teammates -

A hallmark of any profession is its ability to see itself, analyze that data, assess potential interventions or modifications to training and education, implement solutions focused on engendering the desired climate and culture within the organization, and assess progress. One key way in which we can do this as religious support professionals in the Army Chaplain Corps is by evaluating our attitudes, behaviors, and best practices regarding facilitating the free exercise of religion within the military community.

I am researching this topic in my personal capacity as part of an academic program at Anderson University. I would appreciate your voluntary participation in a survey that will take 10-15 minutes to complete. The results of this research will be published as part of a Ph.D. dissertation focused on organizational leadership. Participation is strictly voluntary, and any demographic data collected will not be used to re-identify respondents. The last part of the survey includes a question about willingness to participate in a follow-on interview in which pseudonyms will be assigned to protect participant identities.

I am grateful for your dedication to serving those entrusted to your care and for your time assisting us in seeing ourselves with increased granularity as a result of this research.

The survey is located at:

https://anderson.qualtrics.com/jfe/form/SV_3eEWrtbM4V8ggWa

Please address any questions to Geoff Bailey at gbailey103@andersonuniversity.edu or

[REDACTED]

Thank you for your time and commitment to serving Service Members, their Families, and authorized civilians.

Respectfully,
Geoff Bailey
Ph.D. Candidate, Anderson University

SURVEY CONTROL NUMBER: **AAES-RMC-23-082**

AGENCY IDENTIFIER: Academic

Expiration Date: 03/16/24

APPENDIX E

Anderson University Institutional Review Board Approval

Anderson University
Human Subjects Committee (HSC)
Institutional Review Board (IRB)

To: Geoff Bailey

Proposal Number and Title: AU2023-0105 Assessing Best Practices of Facilitation of the Free Exercise of Religion by Army Chaplains Utilizing the Success Case Method

Date: 1/18/2023

The Human Subjects Committee (HSC) received the above-titled research proposal. The following committee members reviewed the proposal: Dr. Pamela Larde, Robert Franklin. The HSC decision is indicated below:

☒ **Approved via Expedited Review.** The study may be conducted during the timeframe outlined in the proposal. Should you find it necessary to make any adjustments to the study as approved, please contact the HSC/IRB Chair in advance of implementing such changes.

If you need clarification regarding the committee's decision, please contact Dr. Robert Franklin, Chair at HSC@andersonuniversity.edu.

Sincerely,



Dr. Robert G. Franklin, Jr.
Chair, Human Subjects Committee

APPENDIX F

Army Human Research Protection Office Approval



DEPARTMENT OF THE ARMY
OFFICE OF THE SURGEON GENERAL
7700 ARLINGTON BOULEVARD
FALLS CHURCH, VA 22042

DASG-HRPO

20 March 2023

MEMORANDUM FOR Geoffrey N. Bailey, Ph.D. Candidate, Anderson University, 316 Boulevard, Anderson, SC 29621

SUBJECT: Assistance Review Completion for Protocol, a-FY23-27, "Assessing Best Practices of Facilitation of the Free Exercise of Religion by Army Chaplains Utilizing the Success Case Method," (AUS2023-0105), Key Investigator: Geoffrey N. Bailey, Ph.D. Candidate, gbailey103@andersonuniversity.edu

1. Review Outcome.

The Army Human Research Protections Office (AHRPO) Assistance Review of the above referenced protocol is complete, and AHRPO accepts the Anderson University's Institutional Review Board's (IRB) approval of the protocol.

The AHRPO assistance review is required to ensure that Department of Defense (DoD) assisted human subjects research (HSR) is compliant with DoD requirements in DoD Instruction (DoDI) 3216.02 and the AHRPO policy for the provision of assistance titled, "Department of the Army Review Requirements for Research Assistance to Non-DoD Institutions". Assistance is defined as non-financial resources that are provided by the DoD to non-DoD institutions for research, including, but not limited to facilities, equipment, access to information about DoD-affiliated personnel for recruitment, access to DoD-affiliated personnel, data, or specimens. Funds that are provided by the DoD through a contract or similar arrangement subject to the Defense Federal Acquisition Regulation Supplement (DFARS); grants, cooperative agreements, technology investment agreements; or other non-procurement awards are not considered assistance. Assistance is a subset of support.

The DoD is providing assistance for the above referenced activity by providing access to DoD-affiliated personnel for recruitment.

2. Requirements.

Substantive Changes to the Protocol: The AHRPO must review and accept the IRB's determination when substantive modifications are made to this research protocol and any modifications that could potentially increase risk to subjects, before the changes are implemented to ensure compliance with the DoDI 3216.02. Substantive modifications include a, change or addition of an institution, elimination or alteration of the consent

SUBJECT: Assistance Review Completion for Protocol, a-FY23-27, "Assessing Best Practices of Facilitation of the Free Exercise of Religion by Army Chaplains Utilizing the Success Case Method," (AUS2023-0105), Key Investigator: Geoffrey N. Bailey, Ph.D. Candidate, gbailey103@andersonuniversity.edu

process, change to the study population that has regulatory implications (e.g., adding children, adding active duty population) or a change that could increase risks to subjects.

Furthermore, if after project initiation, the project changes such as that it is no longer in the scope of the AHRPO assistance policy, the project must receive additional DoD Human Research Protection Program (HRPP) review before the expenditure of funds and/or the initiation of revised activities. Such activities that would require a different type of review include:

- Addition of any activities that will be supported by the DoD through funds provided to non-DoD institutions through a contract, grant, or similar agreement
- Addition of DoD-affiliated personnel serving as investigators in such a way that engages the DoD institution in HSR.
- Addition of study procedures involving DoD-affiliated personnel as subject when those study procedure are determined to involve greater than minimal risk to subjects, and/or test articles subject to the Food and Drug Administration (FDA) regulations 21 CFR Parts 312 and 812.
- Addition of any activities that require a Component Level Administrative Review (CLAR) in accordance with DoDI 3216.02, §3.6.a(1)(a)-(f).
- Addition of prisoners as subjects.

Access to Records. Records maintained by non-DoD institutions IAW the non-DoD institutions' record retention policies as specified by 45 CFR 46/32 CFR 219 that are directly related to the DA assistance must be accessible for inspection and copying by AHRPO.

Notification. The investigator should immediately notify the AHRPO of the occurrence of any of the following:

- When the IRB used to review and approve the research changes to a different IRB;
- Suspension or termination of this research study by the IRB, the institution, the sponsor, or any regulatory agency;
- Substantiated unanticipated problems involving risks to subjects or others related to this research study; and
- Substantiated serious or continuing noncompliance related to this research study.

3. Other Considerations.

SUBJECT: Assistance Review Completion for Protocol, a-FY23-27, "Assessing Best Practices of Facilitation of the Free Exercise of Religion by Army Chaplains Utilizing the Success Case Method," (AUS2023-0105), Key Investigator: Geoffrey N. Bailey, Ph.D. Candidate, gbailey103@andersonuniversity.edu

If your activity includes an information collection (IC) (i.e., surveys including focus groups, questionnaires, etc.) IAW AR 25-98, DoDI 1100.13, and DoDI 8910.10, review of the activity by the U.S. Army Records Management and Declassification Agency (RMDA), Records Management Division (RMD), Information Collections Branch, may be required. This is a separate review from AHRPO's review. For more information, contact the Army Information Management Control Officer (IMCO), Mr. Kurt Hedberg [REDACTED]. AHRPO acknowledges that you have already obtained approval from RMDA (Control No. AAES-RMC-23-082).

4. Caution.

Do not construe this AHRPO memorandum as IRB approval, DoD Institutional approval, or other DoD support agreement. This review confirms only that the above reference project is deemed by AHRPO to be compliant with the requirements identified in the AHRPO assistance policy and DoDI 3216.02.

5. Point of Contact.

The AHRPO Point of Contact for any questions regarding this memorandum is Sarah P. Rule, MPH, CCRP, at [REDACTED] or [REDACTED]

[REDACTED]
SARAH P. RULE, MPH, CCRP
Deputy Director
Army Human Research Protections Office

APPENDIX G

Anderson University Revised Institutional Review Board Approval

-

Anderson University
Human Subjects Committee (HSC)
Institutional Review Board (IRB)

To: Geoff Bailey

Proposal Number and Title: AU2023-0105 Assessing Best Practices of Facilitation of the Free Exercise of Religion by Army Chaplains Utilizing the Success Case Method

Date: 3/20/2023

The Human Subjects Committee (HSC) received the above-titled research proposal. The following committee members reviewed the original proposal: Dr. Pamela Larde, Robert Franklin. The revisions submitted by email on 3/17/2023 were reviewed as well. The HSC decision is indicated below:

☒ **Approved via Expedited Review.** The study including revisions may be conducted during the timeframe outlined in the proposal. Should you find it necessary to make any adjustments to the study as approved, please contact the HSC/IRB Chair in advance of implementing such changes. This approval is valid for one year from the date of the letter submitted above.

If you need clarification regarding the committee's decision, please contact Dr. Robert Franklin, Chair at HSC@andersonuniversity.edu.

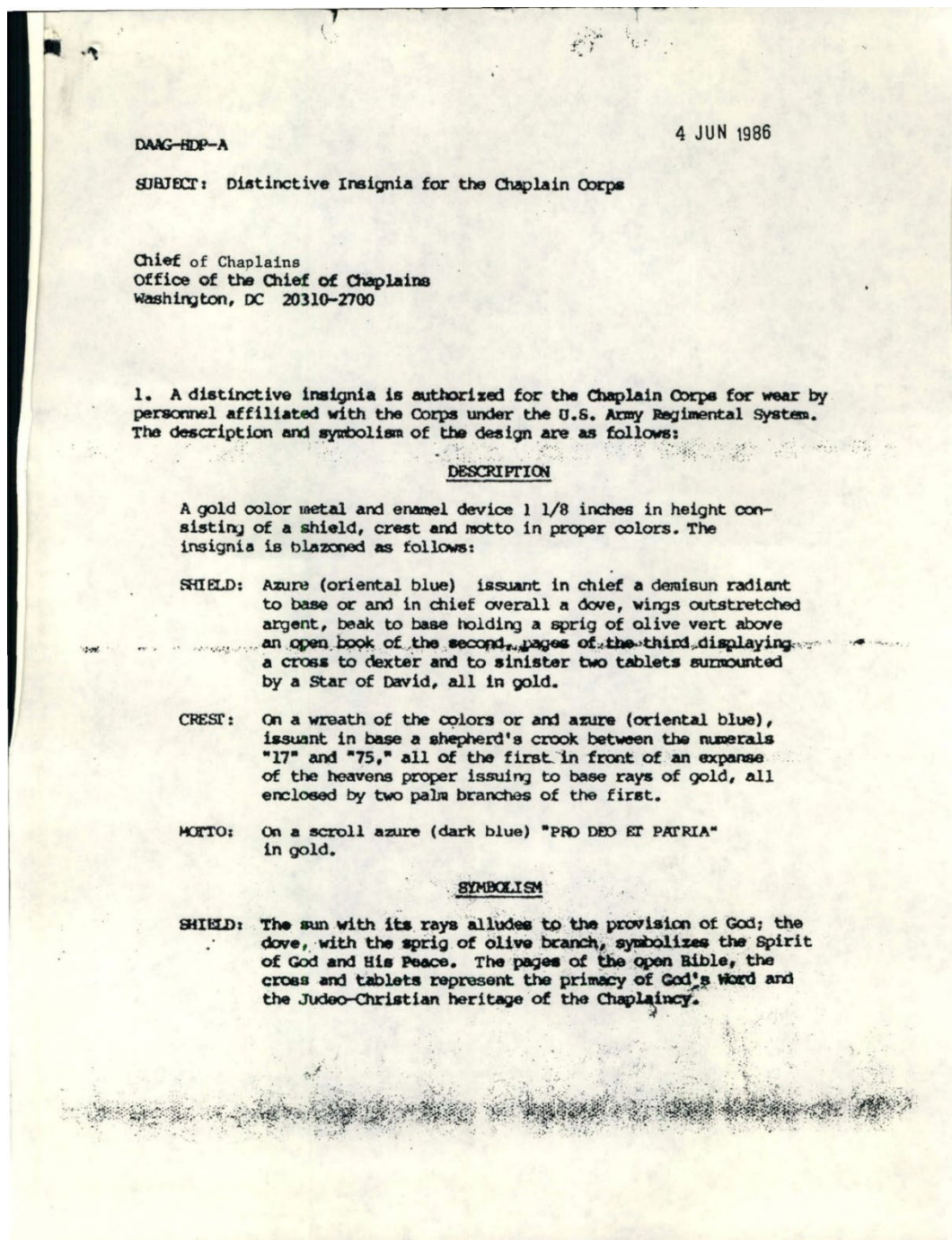
Sincerely,



Dr. Robert G. Franklin, Jr.
Chair, Human Subjects Committee

APPENDIX H

1986 Chaplain Distinctive Insignia Authorized²



² Gerald T. Luchino, Memorandum to the Chief of Chaplains 04 June 1986, "Distinctive Insignia of the Chaplain Corps," Emailed to the researcher from the digital archives of the U.S. Army Institute of Heraldry.

4 JUN 1986

DAAG-HDP-A


SUBJECT: Distinctive Insignia for the Chaplain Corps

CREST: The color blue representing the heavens alludes to the spiritual nature of the mission of the Chaplain Corps. The rays represent universal truth and the surrounding palm branches spiritual victory. The shepherd's crook is emblematic of pastoral ministry and the numerals "1775" commemorate the date of the establishment of the Army Chaplaincy.

MOITO: The motto is translated "For God and Country."




2. This authorization is in accordance with paragraph 31-21a, AR 670-1.

3. This authorization letter will become a part of the permanent organizational history files of the organization in accordance with File No. 228-08, AR 340-2 or AR 340-18-2, as applicable.


GERALD T. LUCHINO
Colonel, GS
Director

APPENDIX I

1992 Chief of Chaplains Design Request³

	<p>DEPARTMENT OF THE ARMY OFFICE OF THE CHIEF OF CHAPLAINS WASHINGTON, D.C. 20310-2700</p>	
REPLY TO ATTENTION OF		
CHSA-ZB (840)		20 August 1992
MEMORANDUM FOR Director, Institute of Heraldry, Cameron Station, Alexandria, VA 22304-5050		
SUBJECT: Revision of Distinctive Chaplain Corps Designs		
<p>1. It is essential that the emblems of the chaplain branch be revised in order to reflect the growing pluralism within our ranks.</p> <p>2. I would like to retain as much of the historical symbols as possible, perhaps simply removing the cross and tablets from the current emblems on the crest, shield, and flag and redefining the symbols remaining.</p> <p>3. I know you are the authorities on symbols in art; nevertheless, I have attached some suggested ideas for your consideration.</p> <p>4. If you will furnish me with an artist's concept of a revised design and your interpretation of the symbols, I will be glad to share a copy with the appropriate religious bodies in an attempt to secure their support. With that agreement, we can minimize any controversy.</p> <p>5. Thank you for your cooperation in this emotionally charged endeavor.</p>		
Encl	 MATTHEW A. ZIMMERMAN Chaplain (MG), USA Chief of Chaplains	

³ Matthew A. Zimmerman, Memorandum to the Director of the Institute of Heraldry 20 August 1992, "Revision of Distinctive Chaplain Corps Designs," Emailed to the researcher from the digital archives of the U.S. Army Institute of Heraldry.

SYMBOLISM OF THE CHAPLAIN CORPS REGIMENTAL CREST

SHIELD AND CREST

Sun: The sun with its rays alludes to the provision of God and the presence of God in nature.

Dove: A long-time symbol of peace, the dove carries an olive branch in its beak. The Chaplain Corps embodies the Army's mission to deter war and, if that fails, to achieve peace.

1775: The year the Chaplain Corps was established.

Open Book: The open book represents the sacred writings and religious documents which reflect the belief systems of the faith groups which are represented in the Army.

PRO DEO ET PATRIA: The motto of the Chaplain Corps translated, "For God and Country".

CREST ONLY



Shepherd's Crook: The first insignia used to identify chaplains in the Army.

Palm Branches: Spiritual victory.

encl 1

APPENDIX J

.1992 Chief of Chaplains Approval of Redesign⁴

	<p>DEPARTMENT OF THE ARMY OFFICE OF THE CHIEF OF CHAPLAINS WASHINGTON, D.C. 20310-2700</p>	
REPLY TO ATTENTION OF		
CHSA-ZB (840)		19 November 1992
MEMORANDUM FOR Director, Institute of Heraldry, Cameron Station, Alexandria, VA 22304-5050		
SUBJECT: Revision of Distinctive Chaplain Corps Designs		
<p>1. I have fully staffed the revised designs for the Chaplain Regimental color, crest, and seal, as well as the flags for the Chief of Chaplains and the U. S. Army Chaplain Center and School.</p> <p>2. I concur with your design and the description of the symbols provided.</p> <p>3. Request you institute the changes.</p> <p>4. Thank you for the superb artistry provided in these new designs.</p>		
<div style="background-color: black; width: 350px; height: 45px; margin: 10px auto;"></div> <p>MATTHEW A. ZIMMERMAN/ Chaplain (Major General) USA Chief of Chaplains</p>		

⁴ Matthew A. Zimmerman, Memorandum to the Director of the Institute of Heraldry 19 November 1992, "Revision of Distinctive Chaplain Corps Designs," Emailed to the researcher from the digital archives of the U.S. Army Institute of Heraldry.

APPENDIX K

1993 Memo of New Authorization and Cancellation of Old Distinctive Unit Insignia.⁵

THE INSTITUTE OF HERALDRY
Bldg. 18, Cameron Station
Alexandria, VA 22304-6060

TAPC-PDH-R (840-10a) 11 FEB 1993

MEMORANDUM FOR Chief of Chaplains, Office of the Chief of
Chaplains, Washington, DC 20310-2700

SUBJECT: Distinctive Unit Insignia for the Chaplain Corps

1. The distinctive unit insignia authorized for personnel affiliated with the Chaplain Corps, by letter DAAG-HDP-A, The Institute of Heraldry, 4 June 1986, is cancelled effective this date.

2. A new distinctive unit insignia is authorized for The Chaplain Corps for wear by personnel affiliated with the Corps under the U.S. Army Regimental System. The description and symbolism of the design are as follows:

DESCRIPTION

A gold color metal and enamel device 1 1/4 inches (3.18 cm) in height overall, consisting of a shield, crest and motto, blazoned:

SHIELD: Azure (Oriental blue) issuant in chief a demi-sun radiant to base or and in chief overall a dove, wings outstretched argent, beak to base holding a sprig of olive vert above an open book of the second. Attached below the shield a blue scroll inscribed "PRO DEO ET PATRIA" in gold.

CREST: On a wreath of the colors or and azure (Oriental blue), issuant in base a shepherd's crook between the numerals "17" and "75," all of the first in front of an expanse of the heavens proper issuing to base rays of gold, all enclosed by two palm branches of the first.

SYMBOLISM

SHIELD: The sun and rays allude to the provision and presence of God in nature. The dove with olive branch, a traditional symbol of peace, embodies the Corps' mission in the Army to deter war and strive for peace. The pages of the open Bible represent the primacy of God's Word.

⁵ Gerald T. Luchino, Memorandum to the Chief of Chaplains 11 February 1993, "Distinctive Insignia of the Chaplain Corps," Emailed to the researcher from the digital archives of the U.S. Army Institute of Heraldry

TAPC-PDH-R

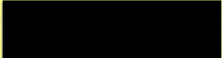
SUBJECT: Distinctive Unit Insignia for the Chaplain Corps

CREST: Blue is representative of the heavens and alludes to the spiritual nature of the mission of the Chaplain Corps. The rays represent universal truth and the surrounding palm branches spiritual victory. The shepherd's crook is emblematic of pastoral ministry and was the first symbol used to identify Chaplains in the Army. The numerals "1775" commemorate the date of the establishment of the Army Chaplain Corps.



MOTTO: PRO DEO ET PATRIA (For God and Country).

3. This authorization is in accordance with paragraph 28-21, AR 670-1.

4. This authorization letter will become a part of the permanent organizational history files of the organization in accordance with File No. 870-5a, AR 25-400-2.


GERALD T. LUCHINO
Director

CF:
CMH
Tech

Concurrence: D&I 
Tech 

AO: M Seid 1/26/93

APPENDIX L

2022 The Institute of Heraldry Email.⁶

Bailey, Geoffrey N (Geoff) COL USARMY CEHQ (USA)

From: Geoffrey Bailey [REDACTED]
Sent: Thursday, June 9, 2022 6:04 AM
To: [REDACTED]
Subject: Fwd: [URL Verdict: Neutral][Non-DoD Source] Army Chaplain Crest RFI (UNCLASSIFIED)
Attachments: TIOH HIST_CHAPLAIN CORPS_REGIMENTAL INSIGNIA_AUTH.pdf

Sent from my iPhone

Begin forwarded message:

From: USARMY Ft Belvoir HQDA Mailbox TIOH Webmaster <[REDACTED]>
Date: June 8, 2022 at 11:42:57 PM EDT
To: Geoffrey Bailey [REDACTED]
Subject: RE: [URL Verdict: Neutral][Non-DoD Source] Army Chaplain Crest RFI (UNCLASSIFIED)

CLASSIFICATION: UNCLASSIFIED

Thank you for being so patient sir,

TIOH issues official memos authorizing/canceling wear when insignia is created or updated. Attached has both memos for the Chaplain Corps Insignia.

The first memo authorizes the new insignia (pages 11-12). The second cancels the previous design (pages 22-23). Consequently, the older insignia design is no longer authorized for wear or production, effective 11 Feb 1993.

V/R

TIOH Webmaster

Please help us improve by completing a short Customer Comment Card:

[REDACTED]

-----Original Message-----

From: Geoffrey Bailey [REDACTED]
Sent: Wednesday, June 1, 2022 09:33 PM
To: USARMY Ft Belvoir HQDA Mailbox TIOH Webmaster <[REDACTED]>
Subject: [URL Verdict: Neutral][Non-DoD Source] Army Chaplain Crest RFI

All active links contained in this email were disabled. Please verify the identity of the sender, and confirm the authenticity of all links contained within the message prior to copying and pasting the address to a Web browser.

⁶ TIOH Webmaster, email message to author, June 8, 2022

I am an active duty chaplain and have a question regarding the Army Chaplain Corps Crest.

(Caution-

<https://tioh.army.mil/Catalog/Heraldry.aspx?HeraldryId=15288&CategoryId=9362&grp=2&menu=Uniformed%20Services&from=search>

<

Caution-

<https://tioh.army.mil/Catalog/Heraldry.aspx?HeraldryId=15288&CategoryId=9362&grp=2&menu=Uniformed%20Services&from=search>

)

The 1986-1993 version had a cross and tablets on the open book. The 1993 revision removed the cross and tablets to communicate a more inclusive chaplaincy as we added Buddhist and Islamic Chaplains. Military Clothing Sales Stores and online vendors still offer the 1986-1993 version and chaplains often wear the older version.

The argument offered, is that there is no wearout date for the older version. Where can we find whether or not the older version is still authorized for wear? I personally view the older version as communicating a narrow view of the chaplaincy, especially for non Christian or Jewish members of the Army Chaplain Corps.

Thanks,



Sent from my iPad

CLASSIFICATION: UNCLASSIFIED

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