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# **JOURNAL OF MILITARY LEARNING**

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Welcome to this edition of the *Journal of Military Learning*. Since assuming the role of the U.S. Army Combined Arms Center, Deputy Commanding General for Education (DCG-E) this past June, I am humbled every day by what this organization does for our Army. It is also a distinct honor to serve as the fourth provost of The Army University, and I would like to personally thank my predecessors for their hard work and dedication to educating the future leaders of our Army.

The world continues to evolve and we, as an Army and as a Nation, must continually adapt to its changes and to emerging threats. The publication of Field Manual 3-0, *Operations*, in October 2017, marked a culture shift in the Army that has driven us to reevaluate the way we train and educate the force. As we look to the future, the Army must be ready to shape, prevent, prevail, and consolidate gains in large-scale combat operations. One of the ways we deter our adversaries and prevent conflict is by producing agile and innovative leaders who can think their way through the challenges that peer competition creates. The *Journal of Military Learning* is a way to deliver peer-reviewed professional writing and research from the operational field for the development of our Army's leaders.

Our purpose is to develop soldiers and Army civilians who are critical and creative thinkers capable of solving complex problems in a fluid and ambiguous environment. Our people are our Army's number one priority. Adaptive and agile leaders who are better educated create an environment of readiness that ultimately leads to mission success on the battlefield.

The peer-reviewed articles in this edition comprise a broad list of topics designed to generate thought, dialogue, and reflection



**Brig. Gen. Steve Maranian, U.S. Army**

Deputy Commanding General–Education  
Provost, The Army University  
Deputy Commandant,  
Command and General Staff College

with the ultimate goal of making us better soldiers, civilians, and leaders. I encourage educators, researchers, and military professionals to submit articles to the *Journal of Military Learning*. We must continually evolve the way we think and challenge the status quo. It is essential to examine alternatives and incorporate lessons learned into education that enables our leaders to shape the operational environment, prevent conflict, and if need be, prevail in large-scale ground combat. A detailed call for papers and the submission guidelines can be found at <http://www.armyupress.army.mil/Journals/Journal-of-Military-Learning>.

Winning Matters!

# Prioritizing Active Learning in the Classroom

## Reflections for Professional Military Education

Mark Hamilton

Inter-American Defense College

### Abstract

This article explores the value of active learning to enhance classroom engagement of military learners, as outlined in the *Army Learning Concept*. It establishes a framework of four criteria that faculty should weigh as they consider integrating active-learning exercises into their coursework. The author discusses three activities piloted in a graduate program for defense/security professionals and analyzes them according to established criteria. The article concludes by discussing key lessons and observations on active-learning innovations that are relevant to broader military and adult education environments.

Whether sitting through lectures, participating in kinetic exercises, or drilling for exams, military learners (like other adult students) carry their ideas, concerns, and experiences to class with them. Faculty can ignore this dynamic but often at the cost of “losing” students and leaving learning outcomes unfulfilled (Butler, Phillmann, & Smart, 2001; Cashin, 1985; Freeman et al., 2014).

Recognizing learner context in an ever-evolving operational environment is one reason why many professional military education (PME) faculty embrace active learning (AL) as an alternative or supplement to traditional lectures. This reflects insights from the Scholarship of Teaching and Learning, or SOTL (Sawyer et al., 2017; Westler & French, 2019). An AL approach values students’ problem-solving capabilities and prior experiences, acknowledging that these factors influence how learners process and utilize new information (Richardson, 2003).

In well-designed AL activities, students “take ownership of the knowledge-acquisition process ... via consistent collaboration with each other” (Glasgow, 2014, p. 526). This peer engagement does not diminish faculty importance; rather, the role of teacher expands to that of trusted mentor.

McTighe and Willis (2019) present a construction metaphor to elucidate teaching/learning practices linked to neuroscience: professors act as “cognitive contractors” in a dynamic learning process, facilitating critical opportunities and resources that students’ “brains need and want in order to construct knowledge” (p. 1), often in collaboration with peers and mentoring faculty. Active learning ultimately seeks payoffs in how well students comprehend and apply the assigned content and engage in their learning community (Shaw, 2010; Thatcher, 1990).

The *U.S. Army Learning Concept for Training and Education: 2020-2040* embraces AL ideas: “Learner-centric environments engage students in frequent context-based problem solving exercises, and, depending on the student population, by encouraging peer-to-peer learning” (U.S. Department of the Army, 2017, p. 17). Per Lira and Beurskens (2017), the Army’s Center for Teaching and Learning emphasizes content mastery and teaching with diverse methods, focusing increasingly on learner-centered approaches. Problem-solving, experience-based reflection, and peer engagement are constituent elements for *Army Learning Concept* learner-centered priorities.

This article outlines a framework of four criteria to support faculty decision-making on integrating AL approaches. A few sample activities are analyzed according to these criteria, considering impacts based on faculty and student observations and relevant assessments. In conclusion, the article addresses benefits, challenges, and tips for integrating AL activities in PME and adult education classrooms.

## Active-Learning Methods in Theory and Practice: Key Criteria

Based on broad literature review and reflections from classroom practice, these four criteria merit critical faculty attention in implementing AL activities: *complexity*, *learning model*, *targeted benefits*, and *potential risks* (Hamilton, 2018). Brief descriptions follow for each criterion, supplemented by an analysis of applied practice in the next section.

**Levels of complexity: Low, medium, and high.** In a practical sense, complexity is the first criterion faculty will consider in course development. Active-learning activities are usually added to existing course content, so professors must assess the limitations of class and preparation time and available resources.

**Dr. Mark Hamilton** serves on the permanent faculty of the Inter-American Defense College, and his teaching reflections build on experience at a variety of academic institutions. He has facilitated professional workshops in the Americas, the Middle East, Europe, and South Asia. He publishes actively and has presented research at national and global conferences. Hamilton received an MA in international development and a PhD in international relations at American University in Washington, D.C.



- ♦ *Low-complexity activities* require minimal faculty preparation and make minimal use of physical resources/props. They are short (often less than 30 minutes) and are used to stimulate engagement and complement lectures.
- ♦ *Medium-complexity activities* require more from faculty, including preparation of resources/props. Debrief time is also required to reinforce student learning, so these activities require an entire class session (50 minutes or more).
- ♦ *High-complexity activities* involve even more preparation and planning. They demand significant resources and may include the development of participant scripts. Activities usually span multiple class sessions, requiring prior student preparation and significant time for classroom debriefs. They may require collaboration from external actors.

**Learning model: Experienced-based reflection versus problem-based learning.**

Per Richardson (2003, p. 1625), AL activities usually prioritize one of two learning models: they focus on students' previous or present (problem-solving) experience.

The first model highlights students' *critical reflection of previous experience*. Faculty facilitate student opportunities to engage and share what they bring to class—military, academic, and professional background, prior successes and failures, even sociocultural biases—then link reflections to course content.

The second model focuses on *problem-based learning*. Professors construct projects and case scenarios that “prompt students to immediately use the knowledge they discover, to apply the information, and to explain it to others” (Burch, 2000, p. 32). In this latter model, students learn by doing.

**Targeted benefits: Content and/or process focus.** Almost 50 years ago, Greenblat (1973) categorized potential benefits of AL activities in fulfilling learning outcomes. The list is adapted in Figure 1 (on page 6), incorporating ideas from Asal (2005) and Shaw (2010).

Effective AL programming requires careful attention to desired learning outcomes. Faculty may prioritize *content-focused benefits*, prizing cognitive learning or longer-term learning. Alternatively, the focus may be on *process-focused benefits*, enhancing students' affective learning, motivation, self-awareness, or faculty-student (classroom) relations.

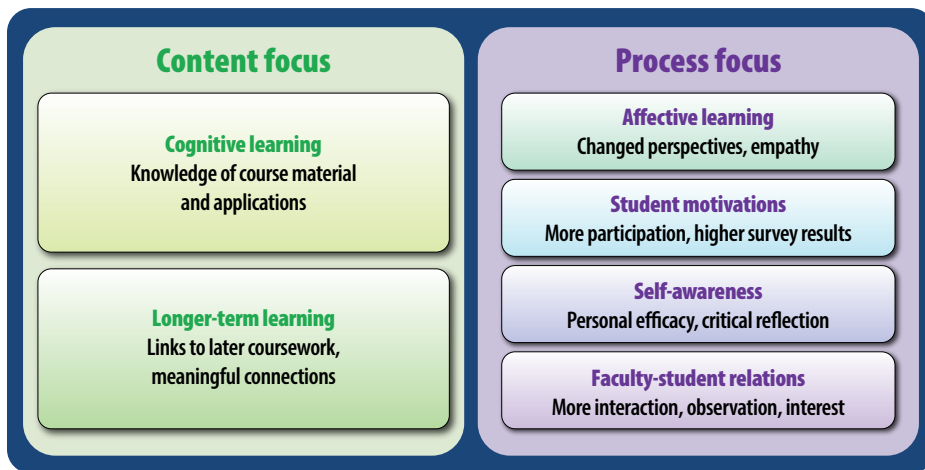
Most AL activities address both content and process benefits, with one or the other more dominant. Generally, per Asal (2005), “content-focused simulations emphasize the amount of information the student needs to absorb about the background scenario or case while process-focused simulations emphasize and require more student effort in the process of interaction” (p. 361).

One of several helpful guides for developing outcome-driven and “authentic” curriculum is the three-stage “Backward Design” process from Wiggins and McTighe (2011): identifying the desired learning outcomes (benefits); determining appropriate assessment tools; and then planning the teaching-learning experience, which may include AL activities.

**Potential risks for implementation.** Finally, it is important to consider potential risks in using AL activities. Risk categories follow, with empirical engagement in the next section.







*Figure 1.* Benefits of classroom active learning activities. Figure drawn by author from “Playing Games with International Relations,” by V. Asal, 2005, *International Studies Perspectives*, 6(3), 359–373; “Teaching with Simulation Games: A Review of Claims and Evidence,” by C. Greenblat, 1973, *Teaching Sociology*, 1(1), 62–83; “Designing and Using Simulations and Role-Play Exercises,” by C. Shaw, 2010, in R. Denemark (Ed.), *The International Studies Encyclopedia*, Blackwell Reference Online.

*Potential loss of control.* Use of AL, including simulations, games, and other exercises, means giving up some control in the classroom. Faculty abandon the comfort of a lecture podium in “passing the chalk” to their students (Chambers, 1997). Faculty with a strong internal locus of control—and years of anticipating canned responses—may feel unprepared for the unpredictability and moving parts of AL activities (Shaw, 2010).

*Potential excess time requirements.* This risk is linked to complexity criterion. Active-learning activities can take longer than a lecture. Faculty considering AL activities should estimate the preparation and class time required (and it is always more than expected). The same unpredictability that can contribute to loss of control can also contribute to time management challenges without a mitigation strategy.

*Potential for student confusion/frustration.* Lack of clarity in the initial instructions or during gameplay of AL activities may create confusion and/or a sense of general frustration for students. Faculty must consider this engagement time and be prepared to respond.

*Potential audience sensitivities.* This risk can emerge due to inadequate attention to student profiles or simply a lack of available information. Results may be serious and can undermine student motivation and classroom trust. For example, participants may take offense or feel alienated by a case-based characterization striking too close to home, a risk particularly relevant to military actors. Other students may feel bullied in role-play exercises, reinforcing their inability to engage with peers. Finally, there may be audience mismatch: exercise lingo may not resonate culturally, and

students may lack motivation for activities that do not connect with their interests or experiences. For these reasons, it is critical for faculty to carefully consider audience alongside targeted benefits in activity development.

*Potential inability to meet expectations.* A final AL risk factor considers unsatisfied expectations. An exercise may fail because its value is oversold or—as often occurs in PME settings—students have prior experience with similar activities, and a new exercise does not measure up in some way.

To close this discussion of potential risks, it bears mention that many can be mitigated with effective faculty planning.

## Application and Assessment of Active Learning in a Classroom Environment

The author's classroom is a fascinating laboratory to analyze AL activities according to the aforementioned criteria. Exercises have been piloted in an academic program focused on defense and security cooperation. The Inter-American Defense College (IADC), based in Washington, D.C., offers an accredited master's degree and features international military leadership and a diverse, mainly civilian PhD faculty. IADC seeks to develop strategic advising capabilities in its student body: military, police, and civilian officials nominated by member governments of the Organization of American States (OAS).

IADC's student body is extremely diverse, drawing from up to fifteen countries and four languages in its recent cohorts. Institutional commitments include multilingual instruction, alumni-facilitated discussion groups, and collaborative problem-solving activities, in line with AL priorities (Hamilton, 2016).

Several AL exercises have been implemented in a course titled Multidimensional Security in the Americas (MDS), which analyzes shared human, public, and national security threats across the Americas. A trio of selected AL activities—Roving Comments, Tragedy of the Commons, and a Cyber Crisis exercise—are organized below by complexity (progressing from low to medium to high) and then analyzed according to the other three criteria recently introduced: learning model, targeted benefits, and potential risks.

**AL Activity #1: Roving Comments exercise.** Roving Comments is employed the first day of class to preview students' background knowledge and document critical reflections on the syllabus, assignments, and course themes. This activity, adapted from Francek (2016) and Brookfield (2011), allows for active student participation and knowledge sharing in a limited time frame and has proven an efficient course launch exercise.

After a brief welcome and introduction, students are assigned to one of four groups (numbering off verbally). They receive basic activity instructions and then move with numbered cohorts to one of four whiteboards preset in corners of the classroom. The boards contain a simple prompt written at the top of each one:



1. Interesting Aspects of the Syllabus
2. Questions/Doubts about the Syllabus, Assignments, etc.
3. Previous Knowledge of Course Themes (“Multidimensional Security”)
4. Questions/Doubts about Course Themes (“Multidimensional Security”)

When groups are sent to assigned whiteboards, they are asked to draft collective responses to their prompt within five minutes. When the time limit is reached, the professor calls “Rotate,” and groups shift to the next station/whiteboard: group 1 to station 2, group 2 to station 3, group 3 to station 4, and group 4 to station 1. Groups are expected to take along an assigned marker, unique in color. At the next whiteboard, groups mark (+), (–), or (?) symbols alongside drafted responses to document agreement, disagreement, or confusion with other groups’ comments. Each group then adds their responses (in a new color).

When “Rotate” is called, groups shift to the next station and follow the same procedure. Usually, one minute less is granted per rotation, under a practice-proven assumption that latter groups focus on review (adding symbols) more than adding new content, which take more time. At the close of the activity—after the students have moved through all stations—they return to their seats and faculty can offer a more comprehensive overview of the course, referencing and responding directly to the collective comments and concerns written on the whiteboards.

What follows is focused analysis of AL criteria, applied to the Roving Comments exercise implemented for course introductions.

***Level of complexity: Low***

This is a simple activity calling for minimal preparation, other than the setup of the whiteboards and drafting of prompts. It also requires minimal resources (other than whiteboards/markers) and under 20 minutes of class time for rotations. The time required for faculty debrief (to engage student responses) depends on the desired level of detail and time available in plenary. For MDS, the professor usually dedicates an additional 20–30 minutes.

***Learning model: Experience-based reflection***

The activity offers students an opportunity to reflect on prior experiences (related to course content), share knowledge and areas of interest, and expose doubts and concerns for the new course. The emphasis here is not solving student problems per se but rather opening a dialogue to support future learning.

***Targeted benefits: Content—longer-term learning; Process—student motivation and faculty-student relations***

Roving Comments permits faculty to observe gaps in students’ content understanding and respond directly to commonly expressed concerns. It sets the stage for longer-term learning because the ideas raised may be referenced in future class sessions.

The AL activity also adds process value via increased efficiency and student engagement. In a limited time, the entire class can express their ideas and compare perspectives with peers. Student motivation—particularly for military learners—is heightened by its physical movement and informal peer interactions. Faculty-student



relations are improved through increased mutual understanding, and professors can also observe subtle classroom dynamics (participation, engagement, cliques, etc.) to prepare them for future classroom interactions.

***Risk factors: Potential loss of control, excess time***

Allowing students to move all around the classroom may feel to some professors like a loss of faculty control. In reality, it represents an intentional sharing of control as part of the AL facilitation process. Still, this can be disquieting for faculty mostly accustomed to traditional lecture. Excess time can also produce “free riding” (lack of engagement by some participants). It is critical to keep the activity moving and encourage diverse writers for each rotation. Ultimately, though, activity risks are very limited, especially given the benefits and the low complexity and preparation required of the professor.

***Activity summary.*** Roving Comments is a good example of a low-complexity, medium-high impact AL activity. It sets a participative tone from the first day of class, and most students respond affirmatively in course surveys on the value added by this AL activity.

**AL Activity #2: Tragedy of the Commons.** A second AL activity, Tragedy of the Commons, was incorporated into the MDS course after reviewing the relevant literature and adapting existing exercises focused on sustainability issues (Barnett, n.d.; Szerlip, 2003). It is implemented early in the course to highlight collective-action problems related to social and environmental vulnerabilities, which is a new topic for many military officials. The exercise addresses collective costs of overusing nonrenewable resources, building on the “tragedy” outlined by Hardin (1968), among others. What follows is a brief analysis of AL criteria applied to the exercise.

***Level of complexity: Medium***

This activity is more complicated than the previous Roving Comments. For faculty preparation, Tragedy of the Commons requires purchase of materials, like bowls (one for every five students), forks, spoons, and cups (for majority of students), packages of goldfish crackers (sufficient to refill the bowls multiple times), and a few reward prizes.

Before class, the professor fills a predetermined number of the bowls (representing lakes) with goldfish crackers (representing the fish). Also apportioned are a specified number of utensils—spoons or forks—for the players to use as “fishing poles.” A student volunteer is selected for each group to act as a sort of referee/administrator to oversee the “fishing process.”

The professor leads multiple “fishing” seasons (rounds of play), and communication among fisherman is usually banned during the first season. After each season/round, the number of fish caught is tabulated per student and collectively per group.

Students are initially incentivized to fish as much as possible. At the start of the game, they are told the winner will receive a prize. They lack communication (banned initially) as well as regulatory norms or a “shadow of the future” critical to game theory “prisoner’s dilemma” (Axelrod, 1984). Based on experience at IADC (with a large class of 60 or more students), the activity needs approximately 60–75 minutes for implementation, including final debrief.



### ***Learning model: Problem-based learning***

Tragedy of the Commons focuses on problem-based learning. In the first fishing season, students' focus is relatively simple: How should I maximize points? They are prompted to win without any consideration for community implications. In subsequent seasons, the strategy becomes more complex: How should I maximize points in context of limited resources? Students discover that future spawning depends on the number of fish available in the lake. The professor will only replace goldfish crackers in proportion to the number still in the bowl. During debrief, students are asked to reflect on implications/cases from their previous experience; still, the primary focus is problem-based learning: reinforcing key concepts by doing.

***Targeted benefits: Content—cognitive learning and longer-term learning; Process—affective learning and faculty-student relations***

The Tragedy of the Commons activity addresses at least four of six benefits discussed by Greenblat (1973). To support students' content mastery, it facilitates cognitive learning on sustainability challenges, reinforcing ideas from class discussions and assigned readings. Additionally, lessons from the exercise can be linked to and referenced in many other courses, thus contributing to longer-term learning.

On the process front, the activity usually strengthens affective learning, as students practice more collaborative strategies in each round. Finally, the general excitement of the activity and students' chance to eat goldfish crackers during class contribute to improved faculty-student relations; playing the game and reflecting on implications is perceived as fun and worthwhile. Scheduled at a stressful juncture of the academic year at IADC, this activity helps to reset student engagement and inspire renewed interest (drawing on faculty observation and student comments).

***Risk factors: Potential loss of control, excess time, confusion/frustration***

The multistep decentralized nature of Tragedy of the Commons presents the potential risks of losing control, exceeding time limitations, and fomenting student confusion/frustration. It is incumbent on faculty to acknowledge and mitigate these risks with proper planning, and it bears mention that none have served to undermine implementation to date at IADC.

***Activity summary.*** The scope of potential benefits for Tragedy of the Commons exceeds the prior low-complexity AL activity. Meanwhile, the potential risks are assessed as medium but very manageable. Tragedy of the Commons is an example of a medium-complexity, high-impact AL activity.

**AL Activity #3: Cyber Crisis exercise.** A third analyzed activity at IADC—a Cyber Crisis exercise—requires at least a four-hour teaching block. It features key operational support from the OAS, a partner/parent organization for IADC. The primary goal of the AL exercise is to provide an experiential platform for students to critically analyze the coordination, privacy, and communication challenges likely to emerge during a widespread cyberattack. It fulfills a diagnosed “practice” gap on cybersecurity that emerged in prior class assessments.





After months of dialogue between faculty and the OAS information management team, the activity was adapted from a technical cyber exercise implemented as a mobile laboratory for OAS member states. For IADC, it has been refocused at a strategic level and takes place in a large room with space for six hardwired pods, each comprised of a table with four laptop computers. Students are asked to simulate leadership roles for critical infrastructure institutions facing simultaneous cyberattacks.

Six groups populate the exercise, representing major public and private institutions in a fictitious country: the presidency, the defense ministry, the national airport, a private bank, a university, and a regional utilities company. Simulated cyberattacks prompt each institution to engage senior leadership, manage expectations via external media (Twitter/online newspapers), and direct (outsourced) technology staff to manage the cyberattack.

In the background of the simulation, OAS information management leaders assume the roles of senior leadership and (email-based) technology staff for all institutions. They guide the exercise and exert pressure on student groups. IADC staff and interns play a critical media role, interviewing groups' public affairs specialists and often provoking controversy with sensationalist journalism published in online newspapers (broadcasted both online and on large screens visible to all groups). IADC faculty move between actors and provide support as needed.

After a fast-paced 90–120 minute simulation, groups draft their critical reflections on assigned whiteboards: (1) analysis of the cyberattack and key challenges, (2) helpful responses employed by the group, and (3) general lessons learned. After a short break, students circulate to review reflections of other groups. Much like the simple Roving Comments exercise explored previously, this activity increases debrief efficiency because it limits the time for verbal sharing in plenary. A brief faculty-facilitated conclusion includes summary insights from the students and OAS partners. What follows is an analysis of AL criteria, applied to the Cyber Crisis exercise.

***Level of complexity: High***

The Cyber Crisis exercise is far more complex than the prior two activities. It requires coordination with diverse actors, and activity development starts months before the class session, including brainstorming sessions, script adaptations, and sequencing decisions based on prior lessons learned.

To satisfy equipment requirements, locale has traditionally been off campus at the OAS. This brings key coordination challenges: buses must be contacted, building access secured, and class size divided in half (two cohorts of 30 or more students). Transportation is arranged to efficiently support morning and afternoon schedules. Student time is planned for four hours (4.5 hours with travel), and faculty and staff/partners manage a very long day (more than nine hours).

A final layer ratcheting up activity complexity is its political nature: IADC's relationship with the OAS raises the profile for institutional leadership. Coordination is thus challenging in a logistical and political sense. The decision to incorporate external actors adds complexity for any AL activity.



### ***Learning model: Problem-based learning***

This activity targets problem-based learning: students respond in real-time with assigned roles to several cyberattacks and media challenges. After one year using a real-country scenario, it was decided to focus on a fictitious country to help level the playing field in terms of harnessing students' prior knowledge.

***Targeted benefits: Content—cognitive learning and longer-term learning; Process—student motivation, self-awareness, faculty-student relations***

The Cyber Crisis exercise addresses five of the six targeted benefits framed by Greenblat (1973). To support content-area knowledge, it targets cognitive learning on cybersecurity, highlighting institutional coordination and preventative action, as discussed by OAS and Inter-American Development Bank (2016) and Vautrinot and Beard (2013). Another key benefit is longer-term learning: students are exposed to the real-time stresses of a cyber crisis and learn experientially on cyber-related issues.

Process-focused benefits also are supported by this AL activity. Based on surveys, essay discussion, and informal interactions, it usually increases student motivation. It elicits benefits for self-awareness and faculty-student relations, at least when the potential risks, discussed below, are overcome.

***Risk factors: Potential loss of control, excess time, confusion/frustration, inability to meet expectations***

This exercise presents higher potential risks, as compared to the other two activities discussed in this article. The first concern is potential loss of control, as it involves approval, participation, and support from many actors. As configured at IADC, the exercise requires voluntary support from an external partner, multiple bus trips through a major U.S. city (during rush hour), and coordinating the schedules of 70 or more students and staff. Finally, due to financial and political dynamics, it requires top-level support from IADC and OAS leadership. In other words, the "loss of control" from a faculty perspective is a reality that must be managed.

In terms of excess time, delays can always emerge the day of the exercise but most can be mitigated via effective preparation. More challenging is the faculty time commitment required for planning and evaluation. This activity requires significant coordination with internal and external actors. Particularly in the first year of implementation, time dedicated to proposals, scripts, logistics, and approval meetings far exceeded the planning requirements for all other class activities combined.

Student confusion/frustration is another potential risk for any complex simulation. Participants need to understand the objectives, requirements, and available tools. For this activity, students not only experience the realistic frustrations of managing a complex cyberattack; additionally, they must adapt to new computer tools and an unfamiliar classroom setting. At IADC, language differences further complicate activity coordination, so student confusion/frustration is a risk worth consideration.

A final potential risk is addressing student expectations. Most military learners are quite familiarized with war-gaming and tabletop exercises, so AL expectations



for similar activities are heavily conditioned. Simulations (a subset of AL activities) have prepared soldiers tactically and operationally for field engagement but often with less emphasis on how they may engage strategically in the face of incomplete information. Previous military experiences heighten student expectations for detailed operational instructions, which are purposefully limited for this cyber exercise (to highlight coordination challenges amid uncertainty).

Still, to overcome unnecessary student frustration and potential resistance, a short prebrief on activity expectations has now been added. Additionally, students receive clear guidance on norms for intergroup communication and are granted additional time in the preattack stage to explore their group roles and experiment with available software tools. There are trade-offs with these adjustments (adding time requirements, potentially limiting groups' creativity, etc.); however, as with other AL activities classified as somewhat higher risk, it is key to manage student expectations and mitigate potential problems.

**Activity summary.** In synthesis, the complexity and potential risks for the Cyber Crisis exercise are relatively high; however, learning benefits and impacts (measured via surveys, faculty observation, and student writing samples) make it a high-value addition to IADC's curriculum. The activity is highly interactive and builds students' critical engagement in content and process realms, overcoming common shortcomings of PME technology simulations (Sevcik, 2011). It exemplifies a high-complexity, high-impact AL activity.

## Comparative Analysis of Sample Activities: Criteria Application

Figure 2 (on page 14) summarizes criteria application for the three classroom activities described in this section and may also be used as a tool for faculty developing and validating other AL activities.

## Reflections on Active-Learning Practice: Observations for Other PME Settings

These are just a few AL activities that have been implemented to enrich teaching in a particular course. Activities vary in their complexity, learning model, targeted benefits, and potential risks. Each contributes to the learning outcomes in the course syllabus and also at the broader institutional level at IADC. All three activities may work in other institutions (and support students in their own learning process), but the emphasis here is the decision-making process for faculty looking to integrate AL activities more generally in a PME environment.

**Variety as a priority in selecting teaching modalities.** Effective teaching requires variety in styles and methods to maintain students' interest and connect content to pre-



Activity name	Complexity level	Learning model	Targeted benefit	Potential risks
	L: Low M: Medium H: High	ER: Experience-based reflection  PB: Problem-based learning	<b>Content focus</b> CL: Cognitive learning LL: Longer-term learning  <b>Process focus</b> AL: Affective learning SM: Student motivation SA: Self-awareness FS: Faculty-student relations	1) Loss of control 2) Excess time requirements 3) Confusion/frustration 4) Audience sensitivities 5) Inability to meet expectations  (Seriousness) <i>Match complexity</i>
<b>Roving comments</b>	L	ER	<b>Content:</b> LL <b>Process:</b> SM, FS	1,2 (L-Potential)
<b>Tragedy of the commons</b>	M	PB	<b>Content:</b> CL, LL <b>Process:</b> AL, FS	1,2, 3 (M-Potential)
<b>Cyber crisis exercise</b>	H	PB	<b>Content:</b> CL, LL <b>Process:</b> SM, SA, FS	1,2, 3, 5 (H-Potential)

Figure 2. Applying criteria to active learning activities at Inter-American Defense College. Figure by author.

vious experience (Sawyer et al., 2017; Westler & French, 2019). Too many lectures may keep students at a distance; however, the overreliance on AL activities may become tiresome (especially for faculty) and can distract from critical content. It is important to change the pace in adult education and build in feedback mechanisms to adapt to students' diverse learning needs and perceptions (Wiggins & McTighe, 2011).

**Low-complexity activities also support student engagement.** Some professors simply default to lecture because of a perceived barrier to AL activities. Developing simulations is perceived as complex, time consuming, and risky, so faculty often give up on AL activities before even trying (to the detriment of student engagement). It is important to offer feasible alternatives. Low-complexity AL



activities (like Roving Comments) can enhance participation in large classroom environments. There are still potential trade-offs for preparation, class time, content focus, and professor control, but complexity barriers are relatively low and learning benefits still high (vis-à-vis lecture).

**Beware of activities too close to students' experience.** Given military students' highly specialized experience, their learning receptiveness is often greater for unfamiliar exercises (such as Roving Comments or Tragedy of the Commons). The closer an activity approaches students' previous competencies (like the Cyber Crisis exercise), the more resistance may be expected. Students usually enjoy familiar activities; however, military actors may shift their focus to differences in activity implementation (thinking as military planners) rather than opening themselves as students to desired learning outcomes.

**Relationships matter for professional military education.** In addition to content benefits, AL activities implemented in the IADC classroom show significant value added in the process realm. AL activities often catalyze or deepen affective learning (healthier class relations), student motivation, self-awareness, and faculty-student relationships.

Military learners arrive to class with rich, often conflicted experiences, and they appreciate opportunities to share their stories, provide feedback, ask questions, and investigate areas of interest. At IADC and elsewhere, highly motivated students are more likely to achieve class objectives and take ownership for their own learning. Military students, like other learners, thrive when they feel respected by their professors, accepted by their peers, and incentivized by results. Professors are wise to value relationships and process in AL activity development to enhance student learning.

## Conclusion

In conclusion, this article has explored the benefits and a few relevant challenges of incorporating AL activities in PME and adult education settings. It provides a framework and set of four criteria to help professors to develop, analyze, and make relevant adjustments to AL activities in their own classrooms. Finally, critical reflections and analyses of several activities applied at IADC are provided as lessons learned to strengthen AL implementation in other military and adult education settings. ❧

*The opinions, conclusions, and recommendations expressed or implied within this article are those of the author and do not necessarily reflect the official policy or position of the Inter-American Defense College, the Inter-American Defense Board, the Organization of American States, or the U.S. Department of Defense.*





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# Developing an Inclusive Outcomes Statement

## Adapting the Degree Qualifications Profile to a Military Context

Erin N. O'Reilly

Defense Language Institute Foreign Language Center

### Abstract

This article explores the application of the Degree Qualifications Profile (DQP) framework at the Defense Language Institute Foreign Language Center to revise an institutional learning statement for inclusiveness, sufficiency, and distinctiveness appropriate to the institutional mission. Using a structured Tuning process, which Jankowski and Marshall (2017) define as a “faculty-driven process of determining in a specific field of study what a student should know and be able to so upon completion of a degree” (p. 7), a matrixed team of stakeholders rewrote an outcomes statement suitable for diverse external audiences. The results of the process suggest that adapting the DQP framework to military training and education contexts has merit.

**A**rticulating the value of training and education programs for diverse stakeholders has become a necessary undertaking for both higher education and the U.S. Army. For the former, a variety of factors have shifted public perceptions of college education, including the increase in the cost for degrees and concerns about student preparedness (Jankowski & Marshall, 2017; Jones & Kleiner, 2015). Similarly, while the military has a strong history of outcomes-based training and education programs, only in recent years has Army University launched a concerted effort to capture the learning experiences across a service member’s career through formal certification, licensure, and educational credentials in partnership with academia and industry (Army University, 2017; Kem & Hotaling, 2017). The parallel evolution of higher education and the Army training mission has resulted in a common need to effectively communicate our stories of learning to diverse audiences, including institutional partners, future employers, and students. Academia

has turned to qualifications frameworks, or outcomes rubrics, to communicate value (Jankowski & Provezis, 2011; Jones & Kleiner, 2015). These frameworks, if adapted, may be suitable tools to help define program quality in a military training context.

This article explores the application of the Degree Qualifications Profile (DQP) framework (Lumina Foundation for Education, 2011) to articulate the program learning outcomes for military service members who graduate from the Defense Language Institute Foreign Language Center (DLIFLC), Monterey, California, with an Associate of Arts degree in foreign language. The article then explores the application process and the challenges in working with the framework. Finally, it closes with recommendations for programs concerned with defining the value of military training and education for audiences external to the Department of Defense (DOD), including academia and future industry employers of program graduates.

### Qualifications Frameworks

In the early 2000s, leaders in the higher-education arena identified accountability as a critical issue surrounding the public's perceptions of quality. This was an unsurprising find considering the majority of assessment reviews were internally oriented using specialized language not intended for public audiences (American Council on Education, 2004). Since that time, differences in vocabulary and assessment processes have continued to be problematic for stakeholders, opinion makers, and the public in their attempts to define and assess quality in higher education (Gaston, 2014; Suskie, 2015). Qualifications rubrics, or frameworks, evolved in response to these challenges and have received increased attention in academia in their deployment at the local, state, and national levels over the past decade (Adelman, Ewell, Gaston, & Geary Schneider, 2014; Markle, Brenneman, Jackson, Burrus, & Robbins, 2013).

These frameworks describe the knowledge, skills, and abilities (KSAs) of a training and education program and their interlinkage based on a qualification, or qualification level, within a system. At the national level, frameworks may be quality assured by governments, accountability offices, or education nonprofits. A framework's purpose is twofold: to instill learner confidence that their learning will be recognized and to assure employers of the learners' skill sets. Frameworks can link together to form overarching

**Erin N. O'Reilly** serves as the quality assurance officer and accreditation liaison officer for the Defense Language Institute Foreign Language Center, Monterey, California. O'Reilly holds a PhD in education from Northcentral University and an MA in English as a second language from Arizona State University. She is a graduate of the Defense Language Institute Foreign Language Center and served one tour overseas with the Multinational Forces and Observers and the U.S. Army. Her interests include faculty development, institutional assessment, and language program administration.



systems, as with the European Qualifications Framework and the Qualifications Framework for the European Higher Education Area (“How Does the EQF Work?” 2019). These interlinking systems accommodate learners who actively move between programs.

Frameworks offer several advantages for institutes working on outcomes (“Connecting Credentials Framework,” 2016). First, they provide a common reference point to compare levels of KSAs that are integrated into degrees, certificates, or licensures within academia and industry. Additionally, frameworks can link knowledge at discrete points across diverse credentials by using a common language. This facilitates translating learning from one credential to subsequent learning programs to ensure continuity of learning and potentially to reduce completion time in a given program.

In 2011, the Lumina Foundation published the DQP, subsequently updated in 2014 (Adelman et al., 2014). The developers of the DQP designed the tool to be flexible enough for any context and to serve “as a universal translator, allowing various groups to talk with each other” (Jankowski & Marshall, 2017, p. 8). Within the United States, the DQP framework has emerged as one of the primary tools to form a consensus on a public definition of quality in higher education at three distinct levels: associate, baccalaureate, and master’s (Jones & Kleiner, 2015). Without a shared definition of quality, higher education cannot self-assess and provide accountability metrics understood by diverse audiences.

The DQP functions as a tool to focus conversations on appropriate outcomes and levels of rigor (Ewell, 2016; Suskie, 2015). Since 2011, more than 780 institutions have used the DQP for a range of purposes, including to assess the connection between general education and major course sequences; to reorient the mission statement and curriculum following a DQP review; to engage in discussions with stakeholders, including employers, about current and future needs; and to perform a gap analysis when reviewing learning statements (Jankowski & Marshall, 2017). This article explores the application of the DQP as a tool to review the inclusiveness of a programmatic outcomes statement. Here, inclusiveness refers to the extent to which the outcomes statement can be understood by diverse audiences, including professionals in higher education outside of the DOD, program graduates, and industry employers.

A statement’s appropriacy can be assessed through a Tuning process. Faculty within the European Union developed Tuning, a “faculty-driven process of determining in a specific field of study what a student should know and be able to so upon completion of a degree” (Jankowski & Marshall, 2017, p. 7), as a means to define learning competencies in such a manner that students moving between countries during their higher education would be prepared regardless of where they had previously studied. Marshall, Kalina, and Dane (2010) describe Tuning as answering the fundamental question: When students complete a specific program, what should they know, understand, and be able to do? In U.S. higher education, Tuning consists of five constituent elements: (a) identifying core competencies for a discipline, (b) identifying possible career pathways, (c) gathering stakeholder input, (d) revising core competencies based on input, and (e) implementing results at the local level. While the exact method of Tuning can





take on different forms, broad stakeholder involvement serves as a cornerstone of Tuning, which fundamentally encourages faculty to transition thinking from the local to the discipline level (Institute for Evidence-Based Change [IEBC], 2012). This stakeholder involvement, in turn, promotes integrative thinking about the students' learning experiences between field-specific knowledge and general education and also across levels (e.g., associate to bachelor's degrees). Finally, those engaged in Tuning have a greater understanding of how other types of institutions approach learning and the description of learning as they work to identify core competencies within a discipline.

Tuning and the DQP are complementary (IEBC, 2012). While Tuning encourages programs to consider discipline-specific expertise across levels, the DQP offers a general framework for five areas of knowledge that may fall outside of a given discipline. These areas include (a) specialized knowledge, (b) broad/integrative knowledge, (c) intellectual skills, (d) applied learning, and (e) civic learning (Adelman et al., 2014). Identifying these five proficiency areas of learning promotes a comprehensive review of the intellectual skills learners develop over a sequence of instruction.

The first area, specialized knowledge, encompasses the outcomes specific to a particular program. This accounts for those concepts, theories, and bodies of knowledge considered fundamental for a given area of study (i.e., field or major). The framework does not prescribe pedagogy but rather a reference point for the level of learning. Second, broad and integrative knowledge refers to learning that fosters global, cultural, and democratic perspectives. While broad and integrative knowledge typically comes from a general education course sequence, the DQP framework allows learning to be articulated at all levels, thus providing support and context for specialized studies. Next, intellectual skills capture learners' fluency in communication (both oral and written) as well as analytical inquiry. Applied learning, the fourth area, is defined as the ability to recall information from prior learning and to combine it with new information in novel situations. The fifth area, civic learning, captures the students' ability to engage with diverse perspectives and to form their own responses to social challenges.

An additional sixth area, institution-specific outcomes, allows institutions to identify learning outcomes unique to their missions (Adelman et al., 2014). Institution-specific outcomes are appropriate for programs that have incorporated mission-based outcomes in their curricula (e.g., faith-based or military programs). This final area allows for increased flexibility in adapting the DQP framework to different contexts.

### Program Overview

Since 2002, DLIFLC has awarded Associate of Arts (AA) degrees in foreign language to program graduates through its regional accreditation (Defense Language



Institute Foreign Language Center [DLIFLC], 2019). The institute currently offers 17 credit-bearing language programs that share standardized learning outcomes related to foreign language proficiency.

As a small, nontraditional federal degree-granting program, one ongoing challenge for the institute involves communicating the value of its credit-bearing courses to audiences external to the DOD, including partnerships with civilian educational institutions through formal articulation agreements, and through the credit-transfer process for individual graduates.

In a recent initiative to review the course catalog documents, the institute convened an accreditation working committee. The catalog's contents meet several accreditation requirements set forth by the accreditor, one of which is the inclusion of a concise statement on programmatic learning outcomes. Clear outcomes statements using accessible language appropriate for a range of audiences serve to bridge the gap for service members interested in continuing their higher education or seeking employment in industry. The original statement was written as follows:

At the end of the DLIFLC language program, students will be able to demonstrate and utilize speaking, reading, listening and writing skills of the language along with the cultural and ethical knowledge of the country and language they are learning. These skills are measured through assessment processes such as Oral Proficiency Interview (OPI), Defense Language Proficiency Test 5 (DLPT5), student learning behavior, and immersion. (DLIFLC, 2017, p. 26)

The previous statement had two limitations. First, it conveyed limited information about the actual KSAs of the program's graduates. The field of foreign language has rich, discipline-specific outcomes that were not included in the original statement (American Council on the Teaching of Foreign Languages, 2015). Second, the statement referenced DOD assessment processes that would be unfamiliar to stakeholders outside of the government. Synthesizing the value of any military training or education in a manner that corresponds to a parallel program in higher education or industry licensing body can support service members throughout their military and civilian careers. As such, the committee adapted the DQP framework to develop an inclusive outcomes statement for the institute's AA degree program.

## Purpose

The objective of this applied project was to explore the suitability of adapting the DQP framework in the development of an inclusive outcomes statement for a military foreign language training and education program.



## Methodology

**Participants.** Using the Tuning approach, a matrixed committee with 13 members participated in the statement revision process. Participants were selected in consultation with academic leadership to ensure broad input from across the institute, as well as expertise in higher education. Led by the institute's accreditation cochairs, the team consisted of administrative representatives from senior academic leadership, shared governance representation, including members of the faculty and Academic Senate, staff representation from the Office of the Registrar and the academic library, and military representation from past graduates serving in administrative appointments.

**Process.** The statement-review process involved a series of four one-hour meetings spanning six weeks. Prior to the first meeting, the accreditation cochairs benchmarked outcomes statements at peer institutions in higher education. Several programs had applied the DQP framework to their foreign language majors. The cochairs provided these statements, copies of the DQP framework, and a handout of DQP definitions to the working group during the first meeting. The cochairs took notes independently during meetings by annotating participants' comments and input and then cross-checked the notes immediately following each meeting.

In the first meeting, the committee cochairs introduced the DQP tool and framework. Participants were asked to brainstorm graduates' KSAs related to each of the six areas in the framework independently. During the second meeting, the members shared examples through discussion and began filling in the framework. Next, the committee chairs consolidated the comments and drafted a statement. The committee reviewed the draft statement and refined the language with collective input at the third meeting. Between the third and fourth meetings, the draft statement was shared with the institute's Academic Senate for feedback. The committee incorporated this input and completed the statement in the fourth and final meeting.

## Discussion

**Application process.** The DQP framework facilitated a discussion that mirrored conversations at peer institutions in academia, namely by understanding that the end product of education, regardless of major or focus area, is individuals capable of thinking critically, communicating clearly, and adapting specialized knowledge needed in the workforce of tomorrow (Jones & Kleiner, 2015). Prior to coming to a consensus about outcomes, however, the group needed to develop a shared understanding of the DQP framework terminology. Below, the revised statement is broken down into three sections, each preceded by a discussion of how the group applied the DQP terminology for that section: specialized knowledge and applied learning, broad and integrative learning, and civic learning.



**Specialized knowledge and applied learning.** First, the committee interpreted specialized knowledge as those foreign language proficiency outcomes taught at peer institutions in academia. This involved benchmarking similar civilian degree programs and mapping outcomes referencing commonly accepted standards and practice for the level of instruction (i.e., two-year foreign language degrees).

Added to these outcomes were institution-specific emphases, covering skills unique to military foreign language professionals outside of the scope of foreign language programs offered at civilian colleges. This specialized knowledge included regional security issues, U.S. foreign policy, and military linguists' job-specific skills.

Next, the committee discussed applied learning and intellectual skills. These areas required a holistic consideration of the learning taking place over the program of instruction (e.g., the graduates' ability to function in diverse groups or synthesizing information when faced with unknowns). Outcomes in applied learning and intellectual skills may be found in general education courses or discipline-specific courses. The faculty members led a discussion focused on classroom and formal coursework experiences that required students to demonstrate content mastery, including problem-solving, dealing with ambiguity, and integrating background knowledge. This discussion covered examples of how these skills develop throughout the program of instruction.

Beginning with the areas of specialized knowledge, and applied learning and intellectual skills, the new statement was expanded as follows:

Service members who graduate DLIFLC with an AA degree achieve a minimum functional and working proficiency in listening and reading (receptive skills) at the Advanced Low Level (2) and proficiency in speaking (productive skill) at the Intermediate High Level (1+) commensurate with the Interagency Language Roundtable guidelines. They have an understanding of the linguistic components and lexicon of the target language; a fundamental knowledge pertaining to the cultural institutions, patterns of behavior, history and geography of the target culture(s) and how these affect values and traditions; and a demonstrated respect, understanding and sensitivity for the cultural norms and values, contributions, social issues, and political institutions of the language's native speakers. Graduates demonstrate problem-solving skills and the ability to deal with knowledge gaps on the job through the application of their education, training, skills, and abilities in the foreign language. They have basic knowledge and awareness of security issues of the target language region and have demonstrated the foundational skills of a military linguist, including transcription, translation, and interpretation. (DLIFLC, 2019, p. 27)

**Broad and integrative learning.** For the second section, the team identified broad and integrative knowledge outcomes through the students' specialized studies and general education coursework. The DQP emphasizes that broad and integrative learning

can happen at all levels to support specialized learning (Adelman et al., 2014). A pre-disposition to focus on the narrow training mission (foreign language acquisition as a technical skill) challenged the team's ability to move beyond field-specific outcomes, which had been included in the first part of the statement. Reorienting the discussion around a shared definition of broad and integrative knowledge led to a statement that more accurately reflected the rich learning that occurs throughout the degree program:

Service members who hold an AA degree in foreign language from DLIFLC possess broad integrative knowledge, skills, and perspectives supportive of the military linguist mission. This knowledge promotes life-long learning in a wide range of human interests and is considered foundational to critically engage with personal, cultural, moral, civic, and societal issues. (DLIFLC, 2019, p. 27)

**Civic learning.** Finally, the committee considered several elements for the civic learning knowledge area, including (a) the service members' participation in a diverse, cross-cultural training context; (b) general education and specialized military studies; and (c) military experiences that are a part of the indoctrination process but take place outside of the classroom during the service members' time at the institute. Combined, these experiences support the development of global citizens prepared for civic responsibilities, as articulated in the final part of the statement:

DLIFLC graduates represent the U.S. as global citizens through their civic responsibilities. At the AA level, graduates develop as global citizens through their educational and military experiences that promote awareness of and respect for complex cross-cultural interactions with individuals who have diverse religions, socio-economic backgrounds, and linguistic perspectives. (DLIFLC, 2019, p. 27)

Overall, the committee's experience in applying the DQP framework was similar to that of other colleges. According to Lederman (2014), one of the strengths of the DQP is that it encourages deeper conversations among faculty members and administrators about what is happening in the classroom, what students should be learning, and what students are learning. The committee discussed student assignments, work products, and assessments as evidence during the statement revision process, further supporting the finding that the DQP framework promotes dialogue around learning outcomes (Ewell, 2013). Additionally, the DQP encouraged the committee to broaden its consideration of learning outcomes beyond the technical skills focus and across the graduates' experiences at the institute. Examining the nexus between the technical learning and the holistic training experience resulted in a richer and more accurate description of what service members have achieved upon degree conferral. The logical next step in the DQP process would involve further mapping and assessment of the degree-level learning outcomes across the training program.





## Barriers to Successful Implementation

Adapting the DQP to a nontraditional education program presented unique challenges. Different audiences possess different levels of understanding and distinctive ways of speaking, a truism for any military training program. Added to this, every field has its own technical language to describe what it does but at the risk that “audiences may take that language as jargon that interferes with their understanding” (Jankowski & Marshall, 2017, p. 156). Through Tuning, faculty develop a greater awareness of how colleagues at other institutions describe learning. When crafting a holistic outcomes statement, the language needed to be inclusive and accessible for the diverse audience of professionals in higher education and private industry. As a military training institution with a well-defined mission, however, committee members had difficulty moving beyond the specialized knowledge and terminology used within the DOD to describe language learning and language proficiency. For example, while the DOD uses the Interagency Language Roundtable scale to measure foreign language proficiency, the institute’s academic peers rely on the American Council on Foreign Language Teaching scale. The final statement includes descriptors for both scales. Similarly, common student-learning outcomes descriptors, which were understood within the working group, needed to be refined for an external audience. To that end, including representatives from the Office of the Registrar and faculty representatives with experience in U.S. higher education on the working team was crucial to the process’s success.

A separate challenge was presenting the DQP framework in a manner so that group members understood its purpose. The DQP framework is not aspirational nor is it designed to capture the ideal outcomes of a program. Rather, the framework articulates what every learner can do at the end of the instructional sequence (Ewell, 2013). This can be a paradigm shift for trainers and educators working with a range of learner capabilities, as the tendency is to focus on the exemplars (Adelman et al., 2014).

A final administrative challenge involved workload. Tuning’s intentional involvement of diverse stakeholders, including faculty representatives, administrators, student support services, and program graduates, resulted in a coherent narrative statement. However, these same individuals had conflicting time demands. While participation was viewed as a positive and valued service to the institute, the members could not dedicate time outside of the structured meetings to work on the project. Reviewing the framework, discussing as a group, and then coming back to continue brainstorming proved more effective than asking individuals to work independently.

## Recommendations


The DQP served as a tool to dialogue collectively about the learning experiences during a program and, arguably, across a lifetime of professional training and education.

Every program serves a unique mission, population, and curricular model. These will shape how a program chooses to engage with outcomes frameworks. Several recommendations can be made for others considering adapting the DQP. First, cross-matrixed working groups with representative stakeholders (i.e., Tuning) will ensure an inclusive end product and raise the collective consciousness of the holistic learner experience. Second, sufficient time needs to be dedicated to norm the group on a shared definition of the DQP terminology. Third, the group will need access to outcomes statements from peer programs in academia or licensing and credentialing bodies for benchmarking purposes (Ewell, 2013). Likewise, selecting programs that have used the DQP themselves further facilitates the process by providing working examples. This step brings attention to the common language used in a given field or sector outside of the military. Finally, teams will want to consider participants' workload to manage the project effectively.

A training program's breadth may determine the relevancy of each of the six DQP knowledge areas. The application of the DQP to the DLIFLC military training and education context was unique because the institute has a comprehensive degree program, including a general education component. As such, the committee addressed each area of the framework with the institute-specific category serving to capture the learning outcomes distinctive to the military mission. While those leading programs with narrower training missions might find only certain areas of the DQP relevant, they may also discover general-education outcomes embedded in the curricula. Reviewing statements from peer institutions and including team members with experience in higher education can foster this broader conversation.

## Conclusion

Institutions bear the responsibility for defining the value of a training or education program in a manner that clearly conveys learning outcomes to the program's stakeholders. Producing documents tailored to express the purpose, goals, and substance of a program to diverse groups promote inclusiveness by facilitating communication (Jankowski & Marshall, 2017). The designers of the DQP developed an adaptable tool capable of identifying and assessing learning outcomes using a common language. This article examined how the DQP framework can be employed to evaluate an institutional learning outcomes statement's sufficiency and strength within a military training and education context.

Military programs aspiring to translate their courses for civilian credits face a challenge familiar to higher education: a sector deeply committed to articulating the value of certifications and degrees to diverse stakeholders. The DQP may help administrators and instructors to think broadly about the learning competencies that military professionals acquire throughout their careers in different training settings and to define those competencies in an inclusive manner that enables academia and industry to better understand the value of the military learning experience. 



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# **Preparing Navy Nurses and Other Junior Officer Health Professionals in the U.S. Navy Reserve to be Ready Now, Anytime, Anywhere**

## **A Leadership Development Project**

Lt. Cmdr. Bermesola M. Dyer

Stevenson University School of Nursing

Cmdr. Amada Y. Avalos

Navy Reserve Expeditionary Medical Facility Bethesda

Kathleen M. White

Johns Hopkins Hospital

### **Abstract**

The U.S. Navy has historically developed leadership competencies as cornerstones for officer training curriculums. As the Navy revamped the training requirements for personnel at the end of 2012, it indicated that all officers, regardless of rank, specialty, or community, were to attend a Navy leadership course every five years (Henson, 2013). In keeping with Navy tradition, a strong emphasis has been placed on leadership development within the Navy Nurse Corps.

Consequently, to strengthen and sustain the Navy Nurse Corps, a group of Navy nurse executives developed a 10-year strategic plan to address eight competencies that Navy Nurse Corps officers should possess at all levels of leadership. To address these competencies and ensure Navy nurses effectively developed these skills, a leadership development pilot project was conducted with 24 Navy nurses and other junior officer health professionals (JOHPs) in two Navy Reserve medical detachments. The purpose of the project was to increase confidence in three recommended leadership skills among the JOHPs by using in-tandem,

online leadership development training resources, and monthly face-to-face group coaching sessions. The project had two goals: (a) provide and evaluate the impact on developing leadership skills through the use of face-to-face group coaching sessions and (b) increase utilization of online military leadership development resources.

A self-assessment survey given to the JOHPs pre- and post-project displayed an improvement in two of the three competencies and an increase in the utilization of online leadership development training resources. The implementation process and outcomes of this pilot project provides insight for future leadership trainings being developed for JOHPs in the Navy Reserve.

**T**he U.S. Navy Reserve Nurse Corps (USNR-NC) provides strategic depth and operational readiness as supplemental manpower in the execution of the U.S. Department of the Navy missions and requirements. Composed of an estimated 1,278 nurses, the USNR-NC accounts for nearly 31% of the total Navy nursing force (U.S. Navy Nurse Corps, 2018). While a wealth of research exists exploring nursing leadership traits, there is little empirical research examining this phenomenon in the U.S. Navy as it relates to nurses who are junior officers in the Navy Reserve.

**Lt. Cmdr. Bermesola M. Dyer, U.S. Navy Reserve-Nurse Corps**, is an assistant professor at Stevenson University School of Nursing. She holds a doctorate in nursing practice from Johns Hopkins University, an MS from Bowie State University, and an MS from the University of Baltimore. Dyer has served in various roles throughout her military career including as the leadership development officer for Expeditionary Medical Facility (EMF) Detachments P and Y.

**Cmdr. Amada Y. Avalos, U.S. Navy Reserve-Medical Service Corps**, is the interim director for administration of Navy Reserve Expeditionary Medical Facility (NR EMF) Bethesda. She received a BS in medical technology from Andrews University, an MA in international transactions from George Mason University, an MA in national security and strategic studies from the U.S. Naval War College, and a graduate certificate in cybersecurity technology from the University of Maryland University College. She has served in a variety of assignments for NR EMF Bethesda.

**Kathleen M. White, PhD**, maintains a joint appointment as a clinical nurse specialist at Johns Hopkins Hospital, where she served as director of the Master of Science in Nursing (MSN), Doctor of Nursing Practice, and master's programs. From 2010 to 2013, White served as a senior adviser to the Center for Health Workforce Analysis, the Division of Nursing, and the Office of Performance Management in the Bureau of Health Professions at the Health Resources and Services Administration.





As commissioned officers, nurses in the USNR-NC are expected to possess strong leadership skills and proficiency in core competencies that enable them to serve in management and leadership roles in complex Navy environments. Evidence suggests that an absence of leadership competence could prove detrimental to Navy missions (Palarca, Johnson, Mangelsdorff, & Finstuen, 2008). Historically, weak leadership skills have been shown to have a direct impact on the retention and recruitment of the Navy workforce as well as morale and safety (Gahol, 2005; Swearingen, 2009). As such, it is vital that junior officers in the USNR-NC be adequately prepared to lead and train other emerging leaders and that they are confident in core leadership competencies utilized while being deployed to a variety of operational environments.

A strong emphasis has been placed on leadership development within the USNR-NC (Palarca et al., 2008). To strengthen and sustain the Navy Nurse Corps and to align the corps' goals with the overall Navy goal of leadership competence, a group of Navy nurse executives developed a 10-year strategic plan, addressing eight core competencies that Navy Nurse Corps officers, both active duty and Navy Reserve, should possess at all levels of leadership (Swearingen, 2009). These competencies included communication skills, leadership abilities, professional development, clinical proficiency, personal growth, knowledge of regulatory guidelines, management abilities, and operational and deployment readiness (Swearingen, 2009).

During an informal roundtable discussion on a monthly training weekend, junior officers from a unit in the USNR-NC and other health professionals reported a lack of confidence in several recommended leadership competencies and expressed interest in increasing leadership proficiencies. Additionally, when asked if they were aware of recommended Navy leadership competencies, 29% ( $n = 7$ ) of the junior officer health professionals (JOHPs) reported they were aware, and 71% ( $n = 17$ ) reported they were unaware of the recommended competencies. A lack of awareness of essential leadership competencies could limit motivation to develop and strengthen these necessary skills. The officers also reported the Navy Knowledge Online (NKO) website, which holds a wealth of leadership development resources, to be somewhat useful (40%;  $n = 8$ ) or not useful (55%;  $n = 11$ ) in helping to develop their leadership skills.

To address these deficiencies, a five-month leadership development training program was piloted for a small group of USNR-NC nurses and other JOHPs. The training focused on three recommended competencies: communication skills, leadership abilities, and professional development. The project purpose was to increase confidence among USNR-NC nurses and other JOHPs in the above-mentioned leadership competencies, using monthly coaching sessions and online learning resources. The project had two goals: (a) provide and evaluate the impact on developing leadership skills through the use of face-to-face group coaching sessions and (b) increase utilization of online military leadership development re-



sources. This article discusses the implementation process and key findings of the leadership training undertaken by this piloted group.

## Review of the Literature

To determine best strategies to promote leadership competence, a comprehensive literature review on leadership development was completed. Evidence from the review supports the use of formal strategies such as having structured educational courses and career pathways in place within an organization, as it is not enough to assume that years of experience equates to competent leadership (Gahol, 2005; Huston, 2008; Raimondo, Pierce, & Bruzek-Kohler, 2008). In addition, the literature suggests that within the constructs of a training framework or a structured program, learned leadership skills must then be applied using real-time situations, role-playing, case studies, or simulations to provide opportunities to practice these new skills (MacPhee, Skelt-on-Green, Bouthillette, & Suruaprakash, 2012; Patterson, Henderson, & Trivella, 2010; Patton et al., 2013). Evidence also supports access to role models, coaching, and mentoring to help nurses navigate through their career choices (Patterson et al., 2010). The aforementioned strategies have been found to be effective in increasing competence and developing leadership skills (Liu, 2010).

In addition, online learning was found to be another effective strategy to build leadership knowledge and skills. (Liu, 2010). A key benefit of the online learning platform is it allows for frequent collaboration with peers within a course compared to face-to-face courses, provides additional opportunities to communicate outside of a classroom setting, increases flexibility, and presents opportunities for self-paced review of content (Liu, Chang Chen, Sun, Wible, & Kuo, 2010).

Social media outlets such as YouTube, blogs, Facebook, wikis, and bulletin boards have also become popular avenues to disseminate information because they provide opportunities for social engagement, rapid feedback, direct communication, and relationship building (Liu, 2010). These platforms also provide flexible learning and visual aids to better understand content and addresses different learning styles (Liu, 2010). Incorporating the use of technology and social media into leadership development can promote a more resourceful and enriched learning experience.

Overall, the evidence recommended leadership development includes systematic, reliable, lifelong strategies that are engaging and provide participants with an opportunity to interact with their peers and leaders and apply lessons learned to real-life experiences (Gahol, 2005; Liu et al., 2010; MacPhee et al., 2012). Using this evidence as a guide, a bundled approach was created for project implementation utilizing face-to-face group coaching sessions and online learning through the learning management system Blackboard Learn by Blackboard Inc.



This pilot project evaluated how face-to-face group coaching sessions and online learning impacted confidence in leadership development among JOHPs in the Navy Reserve. The project addressed three leadership competencies: communication skills, leadership abilities, and professional development. The three competencies of focus for this project, selected in collaboration with both active and reserve senior nurse executives, are defined below:

*Communication skills* are the abilities to communicate in all forms and at all levels within the organization; to actively listen; and to effectively use writing, conflict resolution, presentation, and interpersonal communication skills (Palarca et al., 2008).

*Leadership abilities* are the competencies to “lead and mentor junior personnel, build teams, identify a mission and the best way to meet that mission, maintain the utmost integrity, and achieve the trust of all members inside and outside of the organization” (Palarca et al., 2008, p. 224).

*Professional development* is learning to influence people, processes, and structures to bring about change; gaining morale-building, motivational, staff development, counseling, coaching, and educator skills; pursuing lifelong continuing education; creating an individual development plan; and obtaining advanced degrees/certifications (Palarca et al., 2008).

## Setting/Sample

The project was implemented over a five-month period during fiscal years 2015 and 2016 at Joint Base Andrews, Maryland, where two Navy Reserve medical detachments trained monthly. To make the project statistically significant, a sample size of 50 participants was needed; however, the small number of nurses and junior officers in the two units precluded achieving this sample size. Invitations were sent via email or in person to all 30 junior officers assigned to the two units, and 24 JOHPs agreed to participate. The participants in this project were U.S. Navy junior officers in health professions attached to Expeditionary Medical Facility Bethesda. More specifically, the participants were connected to Detachment P or Detachment Y.

## Method and Design

Prior to the start of the project, the Department of Research Programs at Walter Reed National Medical Center determined that the project was Institutional Review Board exempt and approval was given to begin implementation. Additional permissions were obtained from the senior nurse executive (SNE) from the Navy Reserve medical units and officers in charge from both of the medical detach-



ments. An SNE has a rank of captain, or O6 (pay grade officer 6), in the Navy and possesses extensive military and nursing leadership experience. SNEs oversee multiple nursing detachments within a Navy region. An officer in charge typically has a rank of lieutenant (O3) or higher and is responsible for one detachment within a designated Navy region.

The original project was designed for Navy Reserve nurses, but due to a small sample size of available nurses and the relevance of leadership competencies to all naval officers (as it relates to the overall Navy mission of leadership development), all junior officers working in a health profession were invited to participate in the training. Junior officers comprise ranks of ensign (O1), lieutenant junior grade (O2), lieutenant (O3), and lieutenant commander (O4).

The project was a mixed method of both quantitative and qualitative analyses of a pilot project, which used a convenience sample of 24 JOHPs. A paired *t*-test was used to compare the means from the preintervention and postintervention questionnaires for both the face-to-face group-coaching sessions and online learning modules. The group-coaching session questionnaires consisted of 20 self-assessment questions and the online-learning module questionnaires consisted of 15 self-assessment questions. Questionnaires were completed by the JOHPs during the first coaching session, collecting demographic information such as age, military rank, and years of military and leadership experience. JOHPs were also asked to appraise their leadership skills, knowledge, and abilities based on the three competencies: communication skills, leadership abilities, and professional development prior to the first coaching session (see Appendix A for the pre-coaching self-assessment questionnaire).

Questions for the self-assessment surveys were derived from the 2008 Navy Nurse Leadership Development Research Study (Palarca et al., 2008). To protect individual participants' confidentiality, information obtained from questionnaires and self-assessments were disidentified. During the first coaching session, JOHPs selected a self-generated identification code, which they used throughout the training. All surveys were administered online via computer or smartphone, and the data collected via Qualtrics Survey Software was placed on a secured database.

**Face-to-face group-coaching sessions.** The project consisted of five monthly, face-to-face, group-coaching sessions. Each session focused on a different competency. The first session provided an overview of the project and oriented JOHPs to the online training modules and resources. Prior to attending the four remaining face-to-face group-coaching sessions, JOHPs were asked to complete the online training module correlating to the competency being addressed during the session. The second through fourth sessions included group coaching/training sessions with subject-matter experts who provided short lectures and integrated case studies and role-playing into the training, addressing one of the three leadership competencies. At the end of each online module and coaching session, the JOHPs



had the opportunity to evaluate the session and its impact on their leadership competence. The fifth and final session was the wrap-up session, which brought all of the competencies together in a final project summary. To ensure consistency for each session, coaches were given learning objectives and key content to address during their respective sessions. A more detailed framework for each coaching session is listed in Appendix B.

A postintervention survey contained questions that assessed the JOHPs' level of confidence in communication skills, leadership abilities, and professional development. Pre- and postintervention survey questions are listed in Appendix A and Appendix C. To determine the impact of the coaching sessions on leadership development, a paired *t*-test was used to compare mean scores between each pre- and post-coaching session survey.

**Online leadership development course.** Prior to the start of the project, an online leadership development course was constructed through Blackboard Learn. The course consisted of five modules that coincided with each of the five face-to-face group-coaching sessions. To prepare for the coaching sessions, JOHPs were requested to read and review the content in the corresponding online module. JOHPs had continuous access to the Navy Leadership Development website including times they were not completing their monthly on base training weekend. The website was a secured course site, exclusive to participants in the project. Participants could access the site remotely through internet access with their username and password. Content for each module on the website provided JOHPs with leadership information specifically chosen from military and leadership resources and relevant to the competency being addressed during the monthly coaching sessions. JOHPs were required to use their military-issued Common Access Card for links directed to restricted military sites such as NKO and Army Knowledge Online (AKO). Website modules were composed of military leadership tools and activities that focused on communication skills, leadership abilities, and professional development. The leadership training was presented in a variety of modalities including stories, interactive videos, and simulations from the NKO and AKO websites, as well as leadership development content from YouTube, Ted Talks, blog posts, scholarly articles, and discussion boards.

In addition to evaluating the effectiveness of the coaching sessions, which addressed the three leadership competencies, JOHPs were also asked to evaluate the effectiveness of the online-training modules to improve their communication skills, leadership abilities, and professional development. The online modules were designed to work in tandem with the coaching sessions to increase confidence in leadership development for the specified competencies. Five questions were asked for each online module using a five-point Likert scale ranging from 1 (strongly disagree) to 5 (strongly agree). Each survey had a total score of 25 possible points. Sample questions for each post-module online survey are included in Appendix D.



## Measurements and Data Analysis

Several techniques were used to evaluate the effectiveness of the pilot project's ability to increase utilization of online leadership training resources including (a) comparing differences in mean percentages of participants' pre- and post-coaching sessions through a paired *t*-test, (b) using Blackboard Learn web analytics software to track frequency of usage for the leadership website, and (c) collecting postmodule surveys and project evaluations from online using the Qualtrics Survey software by Qualtrics LLC. In total, there were eight surveys distributed to JOHPs, five in-person surveys and three online postmodule surveys.

## Results

Overall, as shown in Table 1 (on page 38–39), 24 junior officers participated in the project with the majority being Navy nurses ( $n = 18$ ). Approximately 25% of the sample population were non-nurse health professionals, including medical doctors ( $n = 2$ ), a physician assistant ( $n = 1$ ), health care administrators ( $n = 2$ ), and a psychologist ( $n = 1$ ). Table 1 displays baseline demographic data for participants in the project. The majority of the sample had less than six years of experience as commissioned officers (75%) and more than half of the participants were lieutenants, who made up 54% of the sample population.

**Coaching sessions.** There was no significant difference in the mean scores in pre-versus post-self-assessment surveys after the communication skills coaching session ( $p = .829$ ). However, results for both the leadership ( $p = .007$ ) and professional development ( $p = 0.20$ ) coaching sessions did have an increase in mean scores after the two trainings with  $p < .05$ . Table 2 (on page 40) displays the results of the preintervention and postintervention scores.

**Online leadership development modules through Blackboard.** Utilization of the online website varied throughout the project. Module one had 100% participation with all 24 JOHPs accessing the Navy leadership resources. Usage for modules two through four had a total of 15 participants, or 63% of the sample. The most common site visited was the discussion forum, which had a total of 18 JOHPs (75%) posting a combined total of 57 posts in the forum during the five-month project implementation.

Response rates for each of the modules were based on the 14 JOHPs who accessed the modules consistently throughout the project and completed the online postmodule surveys. Table 3 (on page 41) shows the response rates for each of the surveys and Table 4 (on page 41) provides the mean scores for each of the modules. Overall, more than 85% of the selected survey answers by JOHPs were “agree” or “strongly agree” when asked if content provided within the modules was effective leadership development resources.





**Table 1.**  
*Junior Officer Health Professionals Participant Demographics*

Variables	Percentages %
<b>Age (years)</b>	<i>n</i> = 24
18-29	6(25)
30-40	14(58)
41+	4(16)
<b>Gender</b>	
M (5)	5(21)
F (19)	19(79)
<b>Current rank</b>	
Ensign (01)	1(4)
Lieutenant Junior Grade (02)	7(29)
Lieutenant (03)	13(54)
Lieutenant Commander (04)	3(13)
<b>Commissioned officer experience (years)</b>	
1-3	13(54)
4-6	5(21)
7-10	3(13)
11-15	1(4)
16+	2(8)
<b>Health care experience (years)</b>	
1-5	8(33)
6-10	10(42)
11-15	2(8)
16-20	2(8)
21+	2(8)

\* *n* = sample size of project participants

\*\* Others included: clinical psychologists, health care administrators, medical doctors, and physician assistants

Weekends were the most common time for JOHPs to access the website with 88% of utilization occurring during reserve weekends on Saturday (45.24%) and Sunday (42.86%). Table 5 (on page 42) describes the number of JOHPs who participated in each of the modules and forums. Monthly participation online ranged from 100%

**Table 1.***Junior Officer Health Professionals Participant Demographics (continued)*

Variables	Percentages %
<b>Current nursing specialty</b>	
Medical/surgical	6(25)
Obstetrics and gynecology	1(4)
Critical care	7(29)
Midwifery	1(4)
Perioperative	1(4)
Emergency	2(8)
**Others	6(25)
<b>Frequency accessing Navy Knowledge Online website (NKO)</b>	
Weekly	1(4)
Monthly	6(25)
Several times a year	5(21)
Rarely	6(25)
Never	6(25)
<b>Usefulness of NKO website</b>	
Extremely useful	1(5)
Somewhat useful	8(40)
Not useful	11(55)

\* *n* = sample size of project participants

\*\* Others included: clinical psychologists, health care administrators, medical doctors, and physician assistants

during the first session to 25% during the last session. Blackboard statistics tracking collected the number of resources used in the online modules. Month one had 62 hits on the training website (17%), month two had 12 hits (3%), month three had 109 hits (42%), month four had 214 hits (58%), and month five had 39 hits (11%). A “hit” is tracked each time a request is sent to Blackboard Learn to access content or resources on the website. In total, the five-month training had 369 hits from the 24 JOHPs for the online content and training resources.

**Final session (session five).** During the fifth month and final session of the training, JOHPs were asked open-ended questions to evaluate the overall training. One prompt was, “Please rate how the overall 5-month leadership training has helped to increase your confidence in the areas of communication skills, professional development and leadership abilities.” The JOHPs reported the following results: Very Effective—2 (33%), Effective—3 (50%), Somewhat Effective—0 (0%), Neutral—0 (0%), Somewhat



**Table 2.***Junior Officer Health Professionals Leadership Development Project Self-Assessment Outcomes*

Competency coaching sessions	Pre-scores mean	<i>n</i>	Post-scores mean	<i>n</i>	* <i>p</i> -value ( <i>t</i> )
Communication skills	29.42	12	29.92	12	.829
Leadership abilities	22.50	14	29.29	14	.007*
Professional development	22.13	8	27.25	8	.020*

Total points possible: communication = 40, leadership = 30, professional development = 30,

(*t*) = paired *t*-test

\*  $p < .05$

Ineffective—1 (17%), Ineffective-0 (0%), and Very Ineffective—0 (0%). Out of a total of one to seven choices on a Likert scale, the mean score for this prompt was 5.83 *SD* (1.47). These results suggest that for those who responded to the prompt, most believed the training was effective in increasing leadership competence.

JOHPs also reported that through the leadership training, they gained more specific ideas they can utilize in their professional civilian/military roles. Two (33%) JOHPs reported they learned a new or advanced skill to utilize in their civilian/military role. Three (50%) JOHPs stated the training may help them do a better job in their civilian and military roles. Four (67%) JOHPs reported being able to update their military skills, and zero participants reported they did not see the impact of the training course on their job.

In addition to the multiple-choice questions, JOHPs were asked open-ended questions, and given the opportunity to provide written feedback on the overall leadership development training project. Written answers provided additional insight and supplemented multiple-choice responses. See Appendix E for responses.

## Analysis and Discussion

The purpose of this leadership development pilot project was to increase confidence in developing three leadership competencies among JOHPs in the Navy Reserve. The

**Table 3.**  
*Online Response Rate*

<b>Competency</b>	<b>Included <i>n</i> %</b>	<b>Excluded* <i>n</i> %</b>
Professional development	11 78.6%	3 21.4%
Communication	9 64.3%	5 35.7%
Leadership	8 57.1%	6 42.9%

\* Excluded cases were junior officer health professionals who did not answer the online surveys based on a sample size of 14 participants

**Table 4.**  
*Online Blackboard Module Scores*

<b>Communication</b>	<b>Mean</b>	<b><i>SD</i></b>	<b><i>n</i></b>
Professional development	21.3 6	11	2.69
Communication	21.3 3	9	2.45
Leadership	21.7 5	8	2.44

Total points possible in module survey score = 25 points

five-month training addressed three out of eight recommended leadership competencies: (a) communication skills, (b) leadership abilities, and (c) professional development.

Findings from this pilot project suggest the use of coaching sessions coupled with online learning can positively contribute to improving JOHP's competence in professional development and leadership skills. The sessions did not seem to positively contribute to increasing competence in communication skills. This may be attributed to the higher number of skills and content addressed during the two-hour session for communication, which had eight skills, in comparison to the other two competencies, which



both had six skills. The communication subject-matter expert reported it was difficult to cover all eight of the skills in detail within the two-hour time frame.

JOHPs who accessed the online modules and completed the surveys reported they found the online leadership resources useful. They also believed the content in the online modules could help improve their confidence in the three competencies addressed during the project. During the initial self-assessment survey, 29% of JOHPs reported they accessed the NKO site weekly or monthly. The remaining 71% of JOHPs reported they accessed leadership resources on the NKO training site several times a year, rarely, or never. At the completion of the project, 56% of the JOHPs were found to have accessed the website on average at least once a month.

The discussion forum was frequently used on the site, which may indicate that JOHPs appreciated the opportunity to engage in thoughtful discussions online.

Over the course of the training, participation fluctuated as JOHPs transitioned in and out of the two medical detachments. Consequently, this impacted mean scores for both goals of the project. There were numerous reasons for the recidivism including

**Table 5.**  
*Online Leadership Development Resource Utilization*

Session participation		
Monthly coaching	<i>n</i>	%*
Project overview (Module 1)	24	100
Communication (Module 2)	13	54
Leadership (Module 3)	11	46
Professional development (Module 4)	13	54
Wrap-up session (Module 5)	6	25
Discussion forum	<i>n</i>	%
Project overview (Module 1)	7	29
Communication (Module 2)	13	54
Leadership (Module 3)	13	54
Professional development (Module 4)	18	75
Wrap-up session (Module 5)	6	25

\* All percentages were based on the initial sample size of 24 junior officers

mobilizing for deployment ( $n = 2$ ), transferring to other units ( $n = 2$ ), relocating out of state due to career or family obligations ( $n = 3$ ), and transitioning into the Inactive Ready Reserve ( $n = 3$ ). Attendance also fluctuated as JOHPs completed their two-week annual training requirements, which overlapped with monthly training sessions.

Despite the small sample size preventing generalizability to the entire JOHPs, important lessons can be learned from this leadership development project. One important observation was that providing designated time for USNR-NC and other JOHPs to access and review the online leadership resources, during the reserve training weekend, increased the level of participation in comparison to the participants accessing the content outside of the training weekend. The original intent of the training was for JOHPs to review the online content prior to training weekends, in preparation for the coaching sessions. During the second session for both units, there was a noticeable decline in website utilization despite several email reminders requesting that JOHPs review the modules. The JOHPs reported difficulty accessing the site due to forgotten user identifications or passwords and time constraints from other civilian and military obligations, which impacted the use of online resources. Some officers requested additional time be given during the reserve weekend to allow them to review the content.

The remaining sessions were adjusted to allow time prior to the coaching sessions for JOHPs to review online content during the training weekend. After this adjustment, the most frequent time the online content was accessed was on drill weekends during the designated training time frames. Additionally, the fourth month had the highest number of hits on the website. One probable reason for this was that more time was dedicated during that month to the coaching sessions in comparison to other months. Additionally, providing time during the reserve weekend to access the online material allowed the project facilitator to troubleshoot and resolve online access issues for JOHPs.

## Recommendations

Based on results of this project, there are several key recommendations that could help improve participation in and results of future training programs for reservists. They include the following:

- ◆ Designate time for the majority of training to occur during the monthly drill weekends including any online coursework that is required.
- ◆ Allow ample, uninterrupted time during the training day for JOHPs to complete coaching sessions.
- ◆ Offer coaching sessions several times throughout the project to adjust for absences.
- ◆ Record coaching sessions and place them on the leadership development website for JOHPs to access on demand at a later time; this may be an effective strategy to ensure important content is available for JOHPs who are unable to attend the face-to-face sessions.





- ◆ Allow flexibility in the training schedule. Roles and responsibilities in the Navy are continuously evolving, and it is essential for naval officers to embrace the changing dynamics. The anticipated completion time frame for the training may need to be adjusted as military demands and operational requirements fluctuate.
- ◆ In addition to self-assessments, a 360-feedback evaluation would be an insightful strategy to evaluate leadership competencies.

## Limitations

Due to time constraints, this training addressed three of the eight recommended leadership competencies for the pilot project. Further research is recommended to address the other five competencies and how best to develop leadership skills due to the transient nature of JOHP reservists. It may also be beneficial to perform a similar project with a larger sample size and include more Navy Reserve medical units to allow for more generalizability of the results. In addition, it could also prove useful to provide the training over a longer time frame to allow adjustments for the influx of junior officers and more participation in Navy leadership training courses.

## Summary and Conclusion

The purpose of this project was to increase confidence among JOHPs in developing three recommended leadership skills using monthly face-to-face group coaching sessions and online learning resources. Based on the pre- and postintervention self-assessment questionnaires, the results from this pilot project showed improved confidence in two of the three competencies and increased utilization of online Navy leadership training resources.

Consequently, these project results suggest that coaching sessions and online learning using a collaborative approach may positively impact leadership competency development among junior officer health professionals in the U.S. Navy Reserve. The results also support the premise that it is beneficial to allocate time during training weekends for junior officers to prepare, learn, and practice leadership skills in collaboration with their peers. JOHPs also appreciate the ability to interact with senior officers through organized mentoring opportunities during training sessions.

Evidence from studies on leadership development found that effective strategies included mentoring, coaching, teaching, role playing, case studies, and e-learning (MacPhee et al., 2012; Patterson et al., 2010; Patton et al., 2013). The evidence also proposed that strategies be systematic, reliable, and lifelong; consequently, many of the suggested strategies were incorporated into this pilot project (Liu et



al., 2010; Palarca et al., 2008; Patterson et al., 2010; Raimondo, Pierce, & Bruzek-Kohler, 2008). The Navy Reserve prides itself on developing exceptional leaders. Continued support and research on innovative leadership development strategies is an important way to ensure junior officer health professionals in the Navy Reserve are “Ready Now. Anytime. Anywhere.” ❧

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## Appendix A.

### *Pre-Coaching Self-Assessment Questionnaire*

#### **Instrument 1. Pre-coaching session self-assessment questions**

**Please describe your level of confidence in the following *skills* using the ratings below.  
Circle your selection:**

1. Strongly agree    2. Agree    3. Neutral    4. Disagree    5. Strongly disagree

#### **Communication**

1. I am confident in my ability to communicate through writing.      [ 1   2   3   4   5 ]
2. I am confident in my ability to communicate through speaking.      [ 1   2   3   4   5 ]
3. I am confident in my ability to communicate through presentation.      [ 1   2   3   4   5 ]
4. I am confident in my ability to communicate with junior personnel in the Navy.      [ 1   2   3   4   5 ]
5. I am confident in my ability to communicate with peers in the Navy.      [ 1   2   3   4   5 ]
6. I am confident in my ability to communicate with senior officers in the Navy.      [ 1   2   3   4   5 ]
7. I am confident in my ability to actively listen.      [ 1   2   3   4   5 ]
8. I am confident in my ability to manage conflict.      [ 1   2   3   4   5 ]

#### **Leadership**

1. I am confident in my ability to lead junior personnel.      [ 1   2   3   4   5 ]
2. I am confident in my ability to build and work within a team.      [ 1   2   3   4   5 ]
3. I am confident in my ability to communicate the mission to others effectively.      [ 1   2   3   4   5 ]
4. I am confident in my ability to meet the mission.      [ 1   2   3   4   5 ]
5. I am confident in my ability to maintain the utmost integrity: has trust of all members inside the U.S. Navy.  
[ 1   2   3   4   5 ]
6. I am confident in my ability to maintain the utmost integrity: has trust of entities outside of the U.S. Navy.  
[ 1   2   3   4   5 ]

#### **Professional development**

1. I am confident in my ability to influence people, processes, and structures to bring about change.  
[ 1   2   3   4   5 ]
2. I am confident in my ability to build morale and motivate others.      [ 1   2   3   4   5 ]
3. I am confident in my ability to develop individual staff.      [ 1   2   3   4   5 ]
4. I am confident in my ability to educate staff.      [ 1   2   3   4   5 ]
5. I am confident in my ability to pursue lifelong continuing education.      [ 1   2   3   4   5 ]
6. I am confident in my ability to create an individualized development plan.      [ 1   2   3   4   5 ]



**Appendix B.**  
*Monthly Coaching Session Framework*

<b>Coaching session</b>	<b>Coaching session activities</b>
<p><b>Month #1</b>  <i>Project Introduction</i>  Presented by project manager (PM)</p>	<ul style="list-style-type: none"> <li>A. JOHPs will be introduced to the leadership development project (15 min)</li> <li>B. Informed consent will be obtained (10 min)</li> <li>C. Leadership self-assessments will be completed during the session by JOHPs and results discussed (20 min)</li> <li>D. Instruction: content will discuss 8 Navy JOHPs competencies (30 minutes)</li> <li>E. Activity: roundtable discussion on JOHPs concerns and leadership needs (30–45 minutes)</li> <li>F. Demonstration of how to use and access leadership development website, electronic training modules and leadership toolkit will be discussed (20 min)</li> <li>G. JOHPs will be instructed to complete the online training module on leadership prior to the next coaching session</li> <li>H. One week prior to next coaching session an email will be sent to all participants reminding them to complete the online module for leadership</li> </ul>
<p><b>Month#2</b>  <i>Communication</i>  Presented by subject matter expert (SME)</p>	<ul style="list-style-type: none"> <li>A. JOHPs will complete online training module on leadership and access pertinent tools in electronic toolkit prior to session</li> <li>B. Coaching session will be facilitated by expert in leadership development</li> <li>C. Activities: <ul style="list-style-type: none"> <li>• 30–45 minute presentation by leadership development subject matter expert</li> <li>• 30-minute role play/case based problem solving activity</li> <li>• Self-reflection activity JOHPs will create leadership development goals</li> </ul> </li> <li>D. Peer networking post coaching session through online discussion forum on website</li> <li>E. Discussion question related to leadership will be posted on website for JOHPs to answer and discuss after session</li> <li>F. JOHPs will be instructed to complete the online training module on communication prior to the next coaching session</li> <li>G. One week prior to next coaching session an email will be sent to all participants reminding them to complete the online module for communication</li> </ul>



## Appendix B.

### *Monthly Coaching Session Framework (continued)*

Coaching session	Coaching session activities
<p><b>Month #3</b> <i>Leadership</i> Presented by SME</p>	<p>A. JOHPs will complete online training module on communication and access pertinent tools in electronic toolkit prior to session</p> <p>B. Coaching session will be facilitated by subject matter expert in communication development</p> <p>C. Activities:</p> <ul style="list-style-type: none"> <li>• 30-45 minute presentation by communications coach</li> <li>• 30-minute role play/case-based problem-solving activity on communication</li> <li>• Creation of communication goals</li> </ul> <p>D. Peer networking post coaching session through online discussion forum</p> <p>E. Discussion questions related to communication skills will be placed on website for JOHPs to answer and discuss after session</p> <p>F. JOHPs will be instructed to complete the online training module on personal growth and professional development prior to the next coaching session</p> <p>G. One week prior to next coaching session an email will be sent to all participants reminding them to complete the online module for professional development</p>
<p><b>Month #4</b> <i>Professional Development</i> Presented by SME</p>	<p>A. JOHPs will complete an online training module on professional development and access pertinent tools in the electronic toolkit prior to the coaching session</p> <p>B. Coaching session will be facilitated by subject matter expert in professional development</p> <p>C. Activities: 30-45 minute presentation by professional development coach subject matter expert</p> <ul style="list-style-type: none"> <li>• 30-minute role play/scenario facilitated by coach and co-investigator</li> <li>• Creation of professional goals</li> </ul> <p>D. Peer networking post coaching session through online discussion forum</p> <p>E. Discussion question related to professional development will be placed on website for JOHPs to answer and discuss after session</p>



**Appendix B.***Monthly Coaching Session Framework (continued)*

<b>Coaching session</b>	<b>Coaching session activities</b>
<p><b>Month #5</b>  <i>Wrap-up session</i>  Facilitated by PM</p>	<ul style="list-style-type: none"> <li>A. Question and answer panel discussion with senior nursing officers and chief petty officers facilitated by co-investigator</li> <li>B. Review of competencies discussed over past 4 months and brief overview of the additional competencies</li> <li>C. Introduction to additional leadership development resources will be provided (i.e., mentoring program, leadership training opportunities, additional leadership development website)</li> <li>D. Conduct postintervention self-assessment evaluation</li> <li>E. Distribute post-project evaluation to all participants</li> </ul>



## Appendix C.

### *Post-Coaching Self-Assessment Questionnaire*

#### **Instrument 2. Post-coaching session self-assessment questions**

**Please describe your level of confidence in the following *skills* using the ratings below.**

**Circle your selection:**

1. Strongly agree   2. Agree   3. Neutral   4. Disagree   5. Strongly disagree

#### **Communication**

1. This coaching session increased my confidence in my ability to communicate through writing.  
[ 1 2 3 4 5 ]
2. This coaching session increased my confidence in my ability to communicate through speaking.  
[ 1 2 3 4 5 ]
3. This coaching session increased my confidence in my ability to communicate through presentation.  
[ 1 2 3 4 5 ]
4. This coaching session increased my confidence in my ability to communicate with junior personnel in the Navy.  
[ 1 2 3 4 5 ]
5. This coaching session increased my confidence in my ability to communicate with peers in the Navy.  
[ 1 2 3 4 5 ]
6. This coaching session increased my confidence in my ability to communicate with senior officers in the Navy.  
[ 1 2 3 4 5 ]
7. This coaching session increased my confidence in my ability to actively listen. [ 1 2 3 4 5 ]
8. This coaching session increased my confidence in my ability to manage conflict. [ 1 2 3 4 5 ]
9. This coaching/training experience will be useful in my work. [ 1 2 3 4 5 ]
10. The topics covered in this coaching session were relevant to me. [ 1 2 3 4 5 ]

#### **Leadership**

1. This coaching session increased my confidence in my ability to lead junior personnel.  
[ 1 2 3 4 5 ]
2. This coaching session increased my confidence in my ability to build and work within a team.  
[ 1 2 3 4 5 ]
3. This coaching session increased my confidence in my ability to communicate the mission effectively.  
[ 1 2 3 4 5 ]
4. This coaching session increased my confidence in my ability to meet the mission. [ 1 2 3 4 5 ]
5. This coaching session increased my confidence in my ability to maintain the utmost integrity: has trust of all members inside of the U.S. Navy. [ 1 2 3 4 5 ]
6. This coaching session increased my confidence in my ability to maintain the utmost integrity: has trust of all members outside of the U.S. Navy. [ 1 2 3 4 5 ]
7. This coaching/training experience will be useful in my work. [ 1 2 3 4 5 ]
8. The topics covered in this coaching session were relevant to me. [ 1 2 3 4 5 ]





**Appendix C.***Post-Coaching Self-Assessment Questionnaire (continued)*

<p><b>Instrument 2. Post-coaching session self-assessment questions</b></p>
<p><b>Please describe your level of confidence in the following <i>skills</i> using the ratings below. Circle your selection:</b></p> <p>1. Strongly agree   2. Agree   3. Neutral   4. Disagree   5. Strongly disagree</p>
<p><b>Professional development</b></p> <ol style="list-style-type: none"> <li>1. This coaching session increased my confidence in my ability to influence people, processes, and structures to bring about change.   [ 1   2   3   4   5 ]</li> <li>2. This coaching session increased my confidence in my ability to build morale and motivate others.   [ 1   2   3   4   5 ]</li> <li>3. This coaching session increased my confidence in my ability to develop individual staff.   [ 1   2   3   4   5 ]</li> <li>4. This coaching session increased my confidence in my ability to educate individual staff.   [ 1   2   3   4   5 ]</li> <li>5. This coaching session increased my confidence in my ability to pursue life-long continuing education.   [ 1   2   3   4   5 ]</li> <li>6. This coaching session increased my confidence in my ability to create an individualized development plan.   [ 1   2   3   4   5 ]</li> <li>7. This coaching/training experience will be useful in my work.   [ 1   2   3   4   5 ]</li> <li>8. The topics covered in this coaching/training session were relevant to me.   [ 1   2   3   4   5 ]</li> </ol>



**Appendix D.**  
*Online Module Questionnaire*

<p><b>Instrument 3. Online module evaluation questions</b></p>
<p><b>Please describe your level of confidence in the following <i>skills</i> using the ratings below.</b>  <b>Circle your selection:</b></p> <p>1. Strongly agree   2. Agree   3. Neutral   4. Disagree   5. Strongly disagree</p>
<p><b>Communication</b></p> <ol style="list-style-type: none"> <li>1. I am confident that I have identified content on communication skills through the online module.  [ 1 2 3 4 5 ]</li> <li>2. I am confident that this online module covered critical content necessary for the mastery of communication skills.      [ 1 2 3 4 5 ]</li> <li>3. I am confident that I am developing the skills and obtaining the required knowledge from this online module to effectively communicate as an officer in the U.S. Navy.      [ 1 2 3 4 5 ]</li> <li>4. The materials presented through this online module will be useful in my work.  [ 1 2 3 4 5 ]</li> <li>5. The materials presented through this online module were relevant to me.  [ 1 2 3 4 5 ]</li> </ol>
<p><b>Leadership</b></p> <ol style="list-style-type: none"> <li>1. I am confident that I have identified content on leadership abilities through the online module.  [ 1 2 3 4 5 ]</li> <li>2. I am confident that this online module covered critical content necessary for the mastery of leadership abilities.  [ 1 2 3 4 5 ]</li> <li>3. I am confident that I am developing the skills and obtaining the required knowledge from this online module to effectively lead as an officer in the U.S. Navy.      [ 1 2 3 4 5 ]</li> <li>4. The materials presented through this online module will be useful in my work.      [ 1 2 3 4 5 ]</li> <li>5. The materials presented through this online module were relevant to me.      [ 1 2 3 4 5 ]</li> </ol>
<p><b>Professional development</b></p> <ol style="list-style-type: none"> <li>1. I am confident that I have identified content on professional development through the online module.  [ 1 2 3 4 5 ]</li> <li>2. I am confident that this online module covered critical content necessary for the mastery of professional development.      [ 1 2 3 4 5 ]</li> <li>3. I am confident that I am developing the skills and obtaining the required knowledge from this online module to effectively develop professionally as an officer in the U.S. Navy.      [ 1 2 3 4 5 ]</li> <li>4. The materials presented through this online module will be useful in my work.      [ 1 2 3 4 5 ]</li> <li>5. The materials presented through this online module were relevant to me.      [ 1 2 3 4 5 ]</li> </ol>



## Appendix E.

### *Project Evaluation Open-Ended Questions and Responses*

#### **Wrap-up session project evaluation open-ended responses**

##### **What did you like most about the leadership development coaching sessions?**

**Response #1** "I enjoyed the interaction with other junior officers as well as leadership. The advice and words of wisdom were very helpful. I also liked the different coaches and experience and expertise they brought."

**Response #2** "Real life experience from people in the field."

**Response #3** "Gave me better perspective and guidance on moving on with my military life, civilian life as well."

**Response #4** "I like the interaction with senior leadership."

**Response #5** "Learning from senior officer mentors."

##### **What did you like least about the leadership development coaching sessions?**

**Response #1** "Find me a mentor!"

**Response #2** "The emails I get when I am not at drill to complete something. I prefer to be able to do them during drill than to do it on my personal time."

**Response #3** "The limited offerings, I was unable to finish the course when I was transferred to a different unit that met at a different location."

**Response #4** "Timing."

##### **Please provide any additional suggestions or comments on how to improve this leadership development training if offered in the future.**

**Response #1** "Amazing training!"

**Response #2** "Awesome opportunity to learn and lead. Can't wait to deploy."

**Response #3** "Set aside more time for people to complete questions/surveys during class time so participants don't need to do them at home. Bring snacks if possible or tell people to bring snacks."



# Charlie Don't Surf

## The Military, War, Film, and Teaching

Morten G. Ender  
U.S. Military Academy

### Abstract

This article advances insight for military and war films in teaching and learning, and strategies and techniques for employing film in college teaching. Literature on teaching and learning with film is reviewed with specific focus on the disciplines of leadership, management, psychology, and sociology. Discussed is the military and war film genre, and cadet tastes and preferences are highlighted. Five specific uses and applications of film are provided: movie referencing, short films, film scenes, full-length films, and an entire film course built around the military and war film genre.

*You can't handle the truth!*

—Col. Nathan Jessep (Jack Nicholson), *A Few Good Men* (1992)

Auguste and Louis Lumière decidedly made one of the first films a military training film in the 1890s titled *A Cavalryman Mounting and Dismounting from His Horse in the Acceptable Military Style* (Mast, 1981). Cinema has since evolved with the Armed Forces, as thousands of military and war films have followed—for example, J. Stuart Blackton's *Tearing Down the Spanish Flag* (1998), the first American war movie; D. W. Griffith's *Birth of a Nation* (1915); Leni Riefenstahl's *Triumph of the Will* (1935); *Private Benjamin* (1980) and *Courage Under Fire* (1996), the first gender-and-military movies; Stephen Spielberg's *Saving Private Ryan* (1998); and *Three Kings* (1999), the first film set during the Persian Gulf War (Langman & Borg, 1989). Military films remain popular today. At the outset of the 21st century, the Global War on Terrorism inspired no abatement of films based on past and present wars—especially fictional accounts and documentaries as well as the intersection of the two with films such as *Thank You for Your Service* (2017); *American Sniper* (2014); *A War* (2015); and *War Machine* (2017)—perhaps making the wars in Iraq and Afghanistan into the most visually documented in history (Ender, 2007). The American public and students, especially military students, are rabid consumers of these films.

War and military films are quite revealing in any contemporary social and cultural climate. Substantively, what makes teaching and learning via film both novel and valuable is the concern for the oft-neglected social science; the military institution is the least studied social institution in sociology. In this case, the largest and one of the most significant social institutions in American society—the military—and the historical periods that are sometimes treated as anomalies in our social history—wars—are clearly influenced by the larger society in which they are embedded. Yet, they do not completely reflect the larger sociocultural environment. Wars are moments of extremity in our sociocultural history and, as novel periods, are often overlooked until organization, indeed social life, returns to normal.

Students today clearly connect with films. Films as pedagogical instruments, particularly at military academies, military-related teaching institutions, and civilian schools with courses interested in matters military, provide insight into the vibrant social institution that is the military and into moments of significant change such as wars or similar deployments involving soldiers and sailors. Further, films can serve as avenues of illustration for teachers to highlight social and behavioral phenomena in their courses. Similar to teaching poetry and history to soldiers, this article offers insight to undergraduate tastes and preferences for films as well as strategies and techniques for employing film in college teaching, drawing on examples from the military and war (Samet, 2002).

### Teaching with Film

Films are ubiquitous as teaching aids for the mass class such as Introductory Sociology (Goldsmid & Wilson, 1980). Next to books, and increasingly computers, films may be the most widely used teaching devices. Films offer a number of advantages in teaching. They allow witness to the historical and the unfamiliar,

**Morten G. Ender, PhD**, is professor of sociology in the Department of Behavioral Sciences and Leadership at the U.S. Military Academy at West Point, New York, where he specializes in the study of military sociology, social psychology, and teaching sociology. He received an AA in general education from the University of Maryland European Division; a BA in sociology and a post-undergraduate certification in nonprofit organization administration from Sonoma State University; and an MA and a PhD, both in sociology, from the University of Maryland. He is a multi-award-winning teacher at West Point and the University of Maryland. He cochairs the interdisciplinary diversity and inclusion studies minor at West Point, and his most recent book is a coedited volume: *Inclusion in the U.S. Military: A Force for Diversity* (Lexington Books, 2017). His research has appeared in such scholarly journals as *Teaching Sociology*, *Journal of Adolescence*, and *Armed Forces & Society*, among others. He is considered a subject-matter expert, having contributed to the *New York Times*, *Army Times*, *Washington Post*, and *National Public Radio*.

events and people, relationships, interaction, social settings, institutions, organizations, and social structures. For the student, films are multisensory devices—familiar, novel, fun, and interesting. Goldsmid and Wilson (1980) note that film is especially pedagogically fruitful in courses involving human issues (p. 263). For example, leadership, management, psychology, and sociology lend themselves especially to the human dimension through film. First, film action can be enlarged, focused, slowed, or sped up by instructors. Second, the unobservable is observable on screen. Third, films heighten human interaction through dramatic extremes. Fourth, movies juxtapose human experience technologically via editing or with scene selections. Further, a few short film minutes can compress a great deal of human interaction that can be unpacked in classroom applications and discussions. Instructors should be aware, however, that films overdramatize social life, and even nonfictional and documentary style films may misrepresent facts.

Goldsmid and Wilson (1980) also offer seven strategies for using film:

- ◆ Use only films clearly appropriate for clearly stated instructional goals.
- ◆ Introduce the film with appropriate questions and suggestions for things to look for.
- ◆ Design follow-up activities.
- ◆ Integrate the film with other aspects of the course—readings, lectures, etc.
- ◆ Alert students to the fact that most films have points of view and then capitalize on that for instructional purposes.
- ◆ Show only the necessary portions of a film.
- ◆ Use the stop-action (pause) capability of films. (pp. 263–264)

Overall, instructors should preview all films used and become familiar with some nuances of the film. The Yale Film Studies Center (<https://web.library.yale.edu/film>) maintains an archive of films in a range of formats. The Internet Movie Database (<http://www.imdb.com>) provides cataloged information about thousands of films. The website Rotten Tomatoes (<http://www.rottentomatoes.com>) is a clearinghouse of print and online media reviews of films. The overall key to successful use of film is introduction (preparation) and follow-up (reflection).

## Teaching Leadership with Film

Courses in leadership have relied on films to depict dimensions of leader and follower concepts and styles. Examples include the use of *The Lion King* (1994) to highlight basic leadership concepts, leadership and counseling theories via *Good Will Hunting* (1997), and leadership and power with *Aliens* (1986). Leadership; management and diversity; effective leadership; ruthless leadership and leadership development; self, moral, and transformational leadership styles; student affairs leadership; and leadership styles are visible in popular films such as *Schindler's List* (1993), *Harry Potter and the Goblet of Fire* (2005), and *Twelve O'Clock*

*High* (1949). Leader-follower relations are evident in the 1989 film *Henry V* (Comer, 2001; English & Steffy, 1997; Koch & Dollarhide, 2000; Harrington & Griffin, 1989; Bumpus, 2005; Graham, Sincoff, Baker, & Ackermann, 2003; Huczynski & Buchanan, 2004; Clemens & Wolff, 2004; McMahon & Bramhall, 2004; Rosser, 2007; Roth, 2005; Bogнар, 1998; Warner, 2007). More recent films and leadership topics include *The Dark Knight* (2008) for toxic leadership and *Iron Jawed Angels* (2004) for authentic leadership (Edwards, Schedlitzki, Ward, & Wood, 2015; Scott & Pennington Weeks, 2016).

### Teaching Psychology with Film

Psychologists have adopted films for teaching particular topics in novel ways. Examples of this include Monty Python films for cognitive psychology; animated films for personality and social development; and feature-length films for bridging psychology and law as well as teaching about social development, madness, aggression, personality theories, and the application of general social psychology concepts (Conner, 1996; Kirsh, 1998; Anderson, 1992; Boyatzis, 1994; Fleming, Piedmont, & Hiam, 1990; Davidson, 1990; Paddock, Terranova, & Giles, 2001; Lakin, & Wichman, 2005). Bluestone (2000) offers an excellent review of the use of feature-length films related to the examination of particular topics from a psychological perspective including LGBT and racism. Social psychology courses are especially amenable to empirical assessment and the use of film clips (D. Roskos-Ewoldson & B. Roskos-Ewoldson, 2001). Film clips and segments inform and are useful in an Experimental Design course, and *12 Angry Men* (1957) has proven successful as a capstone tool for Introductory Psychology (Sterlan, 2018; S. Blessing & J. Blessing, 2015).

### Teaching Management with Film

Management courses are agreeable to the use of film for teaching and learning as well. Three examples include a particular auteur's vision and the study of social institutions, management, and life lessons from *Dead Poets Society* (1989), and corporate leadership in Michael Moore's 1989 documentary *Roger & Me* (Scherer & Baker, 1999; Serey, 1992; Bateman, Sakano, & Fujita, 1992). Specific courses have relied on films as well. Films can effectively be used in courses on organizational behavior, organizational psychology, sport management, and business ethics (Champoux, 1999; Casper, Champoux, Watt, Bachiochi, Schleicher & Bordeaux, 2003; O'Bannon, & Goldenberg, 2008; Williams, 1998). Likewise, management theory can come alive via film (Lee & Lo, 2014).



## Teaching Sociology with Film

Films have enhanced teaching and learning in a variety of sociology courses (Papademas, 1993). Mitchell (2004) offers an excellent guide for connecting films to specific social issues. Emory Burton (1988) identified 167 films under 37 sociological topics ranging from adolescence to war. Tolich (1992) adopted films for sociology of work, organizations, and industrialization courses. Scholars have documented the use of film in a range of sociology courses, including introductory sociology, theory, popular culture, stratification, social problems, race and ethnicity, ageism, social movements, and medical sociology (Berg, 1992; Bickford Tipton & Tiemann, 1993; Fails, 1988; Groce, 1992; Demerath, 1981; Dressel, 1990; Hannon & Marullo, 1988; Lee & Lo, 2014; Papademas, 1993; Mitchell, 2004; Emory Burton, 1988; Tolich, 1992; Loewen, 1991; Valdez & Halley, 1999; Anwary, 2003; Fisher, 1992; DeFronzo, 1982; Dagaz & Harper, 2011; Livingston, 2004; Tan & Ko, 2004; Pescosolido, 1990). Hood-Williams (1986) used soap operas to put “recognizable flesh” (p. 14) on a Sociology of Family course, and Smith (1973) provides empirical support for the utility of film to be equal to the lecture format in learning sociology. Dowd (1999) argues that a Sociology of Film is possible if the sociologist considers and helps the student appreciate the perspective of the director—what some call auteur theory. Films can stimulate critical thinking among students—a major learning objective of social science courses (Bassham & Nardone, 1997; Remender, 1992). Prendergast (1986) developed a community film series to encourage making connections between private troubles and public issues, otherwise known as sociological imagination. More recently, popular crime films can be useful to deconstruct myths about the criminal justice system (Kadleck & Holsinger, 2018).

## The Military and War Film Genre

The war film genre in particular has gained attention in recent years with most scholarship centered on American experiences in specific U.S. military involvements. Resources for films about the different wars include the World War I film *Hollywood's World War I Motion Picture Images* (Rollins & O'Connor, 1997). For an insight into social science topics and World War II films, there are *Projections of War: Hollywood, American Culture, and World War II*; and *Celluloid Soldiers: Warner Bros.'s Campaign against Nazism* (Doherty, 1997; Birdwell, 2000). Rollins (1997) provides a useful book list of World War II-related films. Evans (1998) provides a review of films from the Cold War in *Celluloid Mushroom Clouds: Hollywood and the Atomic Bomb*, and Jeffords (1994) catalogs the reinvention of the military through film during the Reagan administration. For Vietnam, there are two excellent edited volumes: *Inventing Vietnam: The War in Film and Television* and *From Hanoi to Hollywood: The Vietnam War in American Film* (Anderegg, 1991; Dittmar

& Michaud, 1991). Indeed, much is made of the perception of Vietnam veterans and the Vietnam experience through film (Adams, 1989; Katzman, 1993). Kellner (1991) provides a critical perspective on live television and the first Persian Gulf War. A comprehensive resource for background on military films is *Guts and Glory* by Lawrence Suid (2002; see also Ender, 2003b). His voluminous book contains detailed and anecdotal information on hundreds of military and war films dating back to 1911. The strength of this volume is the coupling of encyclopedic knowledge with interviews and reviews in an essay format. Suid also has a volume exclusive to naval films (Suid, 1996). Niemi (2018) narrows the focus to 100 “great” war films by examining the realism depicted in each movie and including recent films such as *Lone Survivor* (2013), *American Sniper* (2014), *Hacksaw Ridge* (2016), and *Dunkirk* (2017). A more critical analysis of the relationship between war and the military and the co-opting of the film industry includes Wasson and Grieveson’s (2018) edited volume, *Cinema’s Military Industrial Complex*.

Researchers have conducted examinations of particular military topical representations in film. Examples are published in scholarly journals and include descriptions of military culture, perceptions of military leaders, the “leaving no soldier behind” creed in two highly popular films—*Saving Private Ryan* (1998) and *Black Hawk Down* (2001)—uniformed heroes in a bureaucratic context, military propaganda films, and representations of military children in films (Harper, 2001; Samet, 2005; Lee & Paddock, 2001; Springer, 1986; Ender, 2005).

### Knowing Students: West Point, Cadets, and Film

Established in 1802 as the first institution of higher education in engineering, the United States Military Academy at West Point, New York, began offering courses in psychology, management, and leadership immediately after World War II. Introductory Sociology was first offered in 1963, and a Military Sociology course came the following year (Ender, Kelty, & Smith, 2008).

The overall mission of the United States Military Academy is to “educate, train, and inspire the Corps of Cadets.” It is a four-year-long intensive military science, physical education, character, and academic undertaking. While curriculum reform has been the norm over the past 217 years since establishment, the academic program remains highly structured and rigorous relative to most civilian universities. Coupled with training in military science (character development) and physical education, cadets must take academic courses in humanities, social sciences, math, science, and engineering to complete their “professional major”—this is in addition to their disciplinary specialty major (e.g., sociology, history, or English). As directed by Congress, upon successful completion of the program, all cadets receive a Bachelor of Science degree.

The academic program at West Point has an overarching educational goal and specific academic program goals. The overall educational goal, updated in June 2018, states: “Graduates integrate knowledge and skills from a variety of disciplines to anticipate and respond appropriately to opportunities and challenges in a changing world” (*Educating Army Leaders*, 2018, p. 7). The program goals meet the educational goal. The learning approach involves active and applied pedagogical strategies.

All classrooms and cadet living quarters at West Point are high-tech equipped and include classroom Smart Boards, and many on-campus departments and centers including the library have an extensive military films selection. Moreover, cadets have Netflix and Hulu accounts and regularly access films online. Therefore, films are easily available for instructional uses and are used as pedagogical tools to stimulate interest around a specific lesson objective. However, given the limited time of classes (55 and 75 minutes) and limitations on cadet time, opportunities to view full-length feature films in class for academic purposes require creative means. Examples include creating an evening film series or creating exception-to-policy courses blocked for two or more hours.

## **Favorite Films of West Point Cadets**

Film clips are popular among both cadets and instructors at West Point. A stroll through the major academic building of Thayer Hall during instructional periods guarantees to reveal a handful of darkened classrooms with cadets and instructors glued to some film clip and a robust audio system perhaps featuring a scene from *Saving Private Ryan* (1998), *Braveheart* (1995), or the 1980 classic *The Big Red One* (Ender, 2004). At the risk of sounding cliché, a two-minute clip can often illustrate a thousand words of lecture.

Teaching and learning involve embracing the cadet’s perspective. This allows the teacher to meet cadets where they are and determine their interests. One should ask, do cohorts of cadets have specific tastes and preferences in films? To answer this question, I informally queried first-year cadets over a five-year period (the graduating classes of 2006 to 2011—keeping in mind these cadets would be senior captains or majors today). Affectionately known as plebes, the roughly 1,000 cadets participated in my 55-minute enrichment class titled Resocialization and Military Film as part of the first-year Introductory Psychology core (required) course. The cadets self-selected into one of seven enrichment classes for this lesson based on personal interest. I typically asked them for feedback on the lesson and for their top three general film favorites and top three military film favorites.

Cadets identified 318 different films as their top general film favorite. The list includes films as diverse as *It’s a Wonderful Life* (1946) to *Rebel without a Cause* (1955), *Pulp Fiction* (1994), *How to Lose a Guy in 10 Days* (2003), and *300* (2006).

Of note is that military films are clearly favorites among cadets—even in the general film category. The top three films listed under general films are *Gladiator* (2000), *Braveheart*, and *Boondock Saints* (1999). The next three favorite include *The Matrix* (1999), *The Lord of the Rings* (2001), and *Fight Club* (1999).

For military films, cadets similarly listed hundreds of military films. They identified 94 different ones as personal favorites—the top three are *Saving Private Ryan* (1998), *Black Hawk Down* (2001), and *We Were Soldiers* (2002).

In terms of general films, the number one and outstanding film for female cadets was *The Notebook* (2004) followed distantly by *Gladiator* and *The Lord of the Rings* (female cadets equaled roughly 15% of the Corps of Cadets during the 2000s). The next three favorite films included *Dirty Dancing* (1987), *Remember the Titans* (2000), and *Old School* (2003). While male cadets chose *Gladiator* and *The Lord of the Rings*, neither *Dirty Dancing* nor *The Notebook* made their top three.

Female cadets reported a number of general films not mentioned by male cadets. Many of the films fell into the classification of male-female relationship films such as *Corrina, Corrina* (1994); *Casablanca* (1942); *Pretty Woman* (1990); and *How to Lose a Guy in 10 Days*, among others. Female cadets also identified films featuring a strong, independent female lead in an occupational context such as *Legally Blonde* (2001), *A League of Their Own* (1992), and *The Silence of the Lambs* (1991). Given these differences, instructors should be conscientious about taste and preference gaps when using films in the classroom.

In sum, knowing students' tastes and preferences can create a student-centered approach to using films in the classroom. Military films obviously work well at West Point—there is a collective identification and interest, and cadets appear to gravitate around specific war films—especially contemporary blockbusters. Such films should also work well at other military schoolhouses. However, when we transgress the military or war film genre, we may need to be more conscientious about tastes and preferences. Overall, cadets differ on their consumption of more general films, and the differences show more nuance along gender lines. Other demographic differences in the classroom could include ethnicity, race, nationality, and age, and may show even further digressions in tastes and preferences for films.

### Case Studies in Film Lengths

This section highlights the various uses of film in teaching, learning, and some student gratifications. Five uses of film are discussed: (1) movie referencing, (2) short clips (two minutes or less in length, e.g., Mel Gibson's Wallace speech in the 1995 *Braveheart*), (3) film scenes (two minutes or more in length, e.g., the death notification of the next-of-kin in the 1998 *Saving Private Ryan*), (4) full-length films

(e.g., the classic 1949 *Twelve O'Clock High*), and (5) an entire film course around a film genre (e.g., Cinematic Images of War and the Military). Each use has multiple dimensions for a range of classroom dynamics.

This section provides a nontechnical discussion designed to highlight the use of film and the logistical dimensions of adopting films in the classroom. Four pedagogical goals are differentiated in the uses of films: attention getter, discussion generator, point illustrator, and application tool. The techniques cross a range of disciplines including leadership, management, psychology, and sociology, and are employable in virtually any instructional context. The techniques include the use of film for specific concepts, discuss films as a genre, and provide examples from specific courses. Some of the material is available through publication.

**Film referencing.** Military films are popular with military audiences. Instructors can quickly survey their particular students about their familiarity with a specific genre or type of film. When all students are familiar with a film, the instructor can reference the film to describe a particular scene, character, or outcome associated with the film to illustrate their point. For example, a lesson on death and dying that focuses on the U.S. Army casualty affairs and memorial operations process can utilize a popular film clip familiar to students. Returning to films that virtually all cadets have seen, I might describe the scene in *Saving Private Ryan* (1998) when the officer and the chaplain notify Mrs. Ryan on the death of three of her sons (the fourth is Pvt. Ryan, played by Matt Damon). Alternatively, I might channel the scene in *We Were Soldiers* (2002) where the taxi driver bungles the death notification he must deliver to a U.S. Army wife. If a handful of students are not familiar with a particular film, instructors can use it as a teaching moment. Allow a student to describe the film succinctly to others and concomitantly encourage the student to apply material from the course to the situation. While it is difficult to assess the pedagogical success of this technique, cadets do want to discuss observations they have from the scene, and this provides additional opportunities to expound on course content. Notably, it draws the class together by engaging and applying material through temporary “student teaching assistants.”

**Film clips.** A short film clip, less than two minutes in length, provides an attention getter, a discussion generator, or a point illustrator. As an attention getter, use a short clip at the beginning of class or with a change in topic to rapidly gain the students’ attention and focus them on the upcoming topic or class. This technique often will focus and engage the students, and it sets the agenda of what will follow. Some colleagues in my department shared their open-ended, anonymous course evaluations with me. In PL300: Military Leadership, a leadership course required of all junior cadets at West Point, over 75% of students positively evaluated the film clips used and called for more clips. When asked what is going well in the classroom, one cadet wrote, “Video clips at the beginning of each class are nice” (PL300 Course Director, personal communication, n.d.).

Similarly, a short clip can generate thoughts and ideas as a warm-up exercise for forthcoming topics. Through student-centered discussions of a short clip and with a little guidance from the instructor, the students will informally and intuitively reach conclusions and achieve the insights that the instructor has set as objectives quicker and with deeper understanding than simply being fed the facts. One cadet wrote, “Videos are relevant and make for good discussion” (PL300 Course Director, personal communication, n.d.). Learning this way allows a student to take ownership and impute his or her own meaning into the learning process. Many times after covering a concept, a short film clip illustrating the just covered point illuminates and helps cement the concept in the students’ minds. Another cadet wrote on the evaluation, “Videos are nice. They helped me understand the material” (PL300 Course Director, personal communication, n.d.). Often, an abstract concept becomes concrete once a student sees the concept in action in a familiar and recognizable situation. One cadet wrote, “Applying theory to real life (movies) helps flesh-out ideas for me” (PL300 Course Director, personal communication, n.d.). In terms of ownership, another student offered the following recommendation to the instructor: “Instead of you picking a movie with examples of material from the course, have us bring in a clip with course material in it” (PL300 Course Director, personal communication, n.d.).

**Film scenes.** A particular scene or a medium-length film clip, two minutes or more in length, serves as another technique for applying course content to film. In meeting the goal of coaching students to apply theory or concepts to a given situation, instructors can employ a medium-length film clip across a wide spectrum of content. Once the stage is set with pre-class reading, instructors can employ film clips to generate some or all of the following: (a) in-class discussion, (b) out-of-class reflective homework assignments, and (c) written products for evaluation.

The film can also be combined with a visit to the scene of the film clip or a staff ride of a battlefield, as our history department does with an exploration of Col. Joshua Chamberlain’s actions at Little Round Top in the film *Gettysburg* (1993)—a few hour’s drive south from West Point. We have also invited a guest speaker to accentuate key points in the film scenario. For example, in our junior-level core course titled Military Leadership, course directors focus on cohesion and leading diverse groups. They screened the film *Remember the Titans* (2000) and invited Coach Herman Boone, played by Denzel Washington, to discuss his leadership styles. Any of these application methods, or a combination of methods, will assist a student as he or she attempts to “apply” theory or concepts to a given situation. Critics might argue films are purely entertainment and have no education value. The key issue is to ensure maximizing the educational value of the film (or film scene) as a pedagogical tool that enables students to meet the lesson, course, and institutional goals and objectives. A cadet wrote on an anonymous end-of-course survey, “The movies helped bring the concepts to the real world better than reading about them” (PL300 Course Director, personal communication, n.d.).

**Feature films.** A full-length film provides similar teaching moments in the same way as short film clips or medium-length films. However, one might select full-length films as innovative ways to review the material in a module, major section, or conventional course before an examination. This is an effective way to allow students to process the information acquired in class. Using a film for review permits students to demonstrate not only their knowledge of course concepts but also their ability to apply what they have learned. For example, *12 Angry Men* (1957), arguably one of the most popular leadership films in existence, is utilized at the U.S. Air Force Academy, the U.S. Command and General Staff College, and several corporations and consultants. West Point makes use of it to process theories and concepts for two courses: Group Dynamics and Introductory Sociology.

Teachers of sociological theory across academe are quick to note that the topic is difficult to teach, and undergraduates perceive it as “dry,” abstract, lacking relevance, and limited in application in the real world (LeMoyne, 2001). To curtail these misgivings, many professors have moved toward a more applied approach to teaching the course. Since 2004, West Point sociology has successfully integrated full-length feature films into the Sociological Theory course required for all sociology majors (Hajjar & Ender, 2005).<sup>1</sup> The course content is traditional; however, the process and structure are atypical. For each major set of theories, there are four lesson modules: two lecturer lessons focused on theory, an outside-of-class film viewing, and a cadet-led direct application of the material. For example, two classes cover Karl Marx’s classical conflict theory, followed by a class period for a viewing of the classic *Modern Times* (1936) featuring Charlie Chaplin, and last, a fourth class applying the content material to the film. In my open-ended written comments on an online survey at the end of the semester asking about the best feature of the course, cadets were unanimous about the use of films to apply their learning of the material. A typical response included, “I liked how we applied each [theory] module to a movie and I thought that class participation helped generate new thoughts and ideas.”

A midterm examination in Military Leadership at West Point utilized the film *When Trumpets Fade* (1998)—a film set in World War II Germany, with an American Army private traumatized by war (because his platoon was devastated) and seeks a discharge but remains in the Army to serve the new platoon sergeant. Cadets receive instructions to view the film on their own time prior to the examination. They then receive an in-class examination that includes multiple choice, short answer, and essay-type questions covering the spectrum of Bloom’s Taxonomy (lower knowledge level, comprehension, application, analysis, synthesis, and evaluation). The examination includes questions dealing with such leadership topics as emotional intelligence, authentic leadership, bases of power, self-serving bias, the leader growth model, the fundamental attribution error, and single and double loop learning among others. For example, an open-ended essay question states: “How did Manning grow and develop as a leader throughout the film? Use and apply course concepts or theories in



depth to support your answer.” Cadet evaluations are highly positive (PL300 Course Director, personal communication, n.d.). Typical responses from cadets include: “I like watching a movie for a test”; “movies for a case study test, now that is cool”; “I feel that more movies of leadership situations would help. I learned more from studying and watching the movies for the midterm than not”; and another, “I like the way the mid-term was [constructed]: saw the movie and then tested on it.”

**Film course.** Cinematic Images of War and the Military is a three-credit film-centric course taught at the United States Military Academy since 2003 (Ender, 2003a, 2009). It began as a special topics course of mostly seniors and juniors drawing cadets from sociology, psychology, leadership, engineering psychology, and management majors. Today, the course is a core requirement for all sociology majors and an elective for nonmajors. In this course, we examine the military as a social institution in the United States and in other countries from the perspective of film. With the help of the sociological orientation, and a weekly focus on social topics such as humor, violence, masculinity, and race and ethnicity among others, we analyze societal relationships between the military and cinema beginning with the early 20th century to the present. For example, we view full-length films for each topic as well as clips such as *A Soldier's Story* (1984) for race, *G.I. Jane* (1997) for gender and sex, *The Great Santini* (1979) for the military family, *Full Metal Jacket* (1987) for resocialization, *Saving Private Ryan* (1998) for death and dying, and *Three Kings* (1999) for moral dilemmas. The course design provides a forum for analysis. Thus, a deeper, more thorough study of the military, war, and cinema are gained through a sociological lens. The course takes an interdisciplinary approach as well including historical, political, cultural, and feminist perspectives.

Through specific course goals, we can represent expectations for cadets and facilitate their successful completion of course requirements. Complete understanding of the course goal is critical as it contains the evaluation criteria for students. The major goal in the course is to provide the intellectual background so that given an existing film related to the Armed Forces, war, civil-military relations, diversity, values, morality, culture, or social justice, the student serves as an emerging professional, a highly informed consumer of popular culture, and an informed citizen.

In addition to specific course goals, West Point has seven areas cadets are expected to pursue in their education. We emphasize these in the course that includes gaining (1) cultural and (2) historical perspectives, understanding (3) human behavior and interaction, developing (4) written and oral communication skills, instilling (5) an orientation to life-long learning, and highlighting (6) creative and (7) critical thinking (*Educating Future Army Officers*, 2007). Finally, there are elements of self-awareness and the Warrior Ethos embedded into the course as well as reflecting perspectives on the West Point leader development philosophy for cadets (U.S. Corps of Cadets, 2002).

The grading of student work in this course assumes that learning is most effective as well as most enjoyable when student evaluation occurs against a known

objective standard rather than in comparison to one another. In putting this philosophy into action, the largest part of the process embeds in the structure of the course. The syllabus and course guide contain all of the learning activities for which the student is responsible (Ender 2003a, 2009). The course is thus an independent study undertaken collectively. The instructor provides the resources and experiences; the cadet assumes the responsibility for learning the material. Evaluative elements of the course include (a) intensive reading and writing assignments with total writings including the final examination ranging between 43 and 77 typed pages; (b) book and article reviews; (c) film reviews including comparing and contrasting, synthesizing, describing, predicting, creating, and evaluating films dealing with sociological topics in war and the military; and (d) a final examination. The final examination comes with the course guide, and it is a self-report of cumulative knowledge. Expectations reside with students who write elaborate essays reporting detailed learnings that synthesize course and outside readings and the viewing of films.

**Table**  
*Course Calendar and Outline for Cinematic Images of War and the Military*

Dates	Topic/event	Requirement
Week 1	Course introduction	Reading
Week 2	Sociological perspective	Reading
Week 3	Postmodern theory	Reading/writing
Week 4	(Re)socialization	Reading/writing
Week 5	Masculinity	Reading
Week 6	Sex and gender	Reading/writing
Week 7	Military families	Reading
Week 8	Race and ethnicity	Reading
Week 9	Death	Reading/writing
Week 10	Humor	Reading/writing
Week 11	Perception	Reading/writing
Week 12	Military academies	Reading
Week 13	Moral dilemmas	Reading/writing
Week 14	Cross-cultural	Reading/writing
Week 15	Global war on terror documentaries	Reading
Week 16	Futuristic	Reading/writing
Week 17	Final examination	Writing


Table by author

The course is an experiment in distance and self-paced learning. Students are responsible for reading the books, chapters, and articles; for viewing films; and for keeping meticulous notes. Attendance, preparation, attentiveness, and participation are essential elements of the course. The course has topical weeks. The outline in the table (on page 66) shows the themes for each week.

Ninety-five percent of cadets having taken Cinematic Images have strongly agreed with major learning outcome statements used for the end-of-semester course evaluations. This is considerably higher than other courses taught in the Sociology Program, the Department of Behavioral Sciences and Leadership, and across West Point. Cadets responded almost unanimously that they strongly agreed with the following statements related to learning regarding the film course: “My motivation to learn and to continue learning has increased because of this course”; “In this course, my critical thinking ability increased”; and “I have the ability to apply the material learned in this course to be a more effective leader.”

### Conclusion

This article has reviewed the higher education literature on the pedagogical uses of film in courses focused on human dimensions, offered insight to undergraduate tastes and preferences for films, and provided some strategies and techniques for employing film in college teaching by drawing on examples from the military and war. Films lend themselves to the teaching and learning of the human sciences—in particular, sociology, psychology, leadership, and management. Military and war films as a genre provide a particularly fruitful area of application of concepts, theories, and models for these disciplines. Five types of strategic pedagogy are available for classroom purposes. West Point has successfully adopted general films and the military and war film genre specifically. Military-oriented undergraduates appear oriented toward the genre. Instructors should note that general film and military film genre tastes and preferences may vary among even a homogeneous group of students and can diverge even further the more heterogeneous their students become.

The future of film appears diffuse. For teaching, films, much like books, are readable text and can continue to serve as instructional tools. Students continue to consume films, and digitization has democratized digital equipment where students can create their own moving images (Butler, 2016).<sup>2</sup> Many amateurs can now create clips and post them on YouTube and other web-based venues. Indeed, some have argued that cinema studies is perhaps the new Master of Business Administration in not only marketing and other commercial fields but also far afield including law, politics, and the military (Van Ness, 2005). More evaluation and assessment of teaching via the diverse venues of film need to be undertaken. Professors simply need to be cognizant of the varied deployments of film outside of the classroom and bring them in. 

## Author's note

*"Charlie don't surf" is a quote from Robert Duvall's character, Lt. Col. Kilgore, in the author's all-time favorite film Apocalypse Now (1979). It is also a song of the same name on the Sandinista (1980) album by the Clash. The author would like to thank Kathleen Campbell, Bill Caruso, and Jamie Efaw for contributing to the earliest iterations of this study. This research benefitted in part from a Faculty Research Grant through the U.S. Army Research Institute for the Behavioral and Social Sciences. An earlier version of this manuscript, titled "Teaching and Learning with Film," was presented at the Teaching and Learning Effectively Using New Technologies (TALENT@WEST POINT) Conference, United States Military Academy, West Point, New York, 5 April 2003. Readers should be aware that the views are the author's and do not purport to reflect the position of the United States Military Academy, the Army Research Institute, the Department of the Army, the Department of Defense, or the U.S. government.*

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## Notes

1. The course is available for download: Ender, M. G. (2012, 25 October). PL384: *Sociological theory through film*. Teaching Resources and Innovations Library of Sociology (TRAILS). Retrieved from <http://trails.asanet.org/pages/resource.aspx?resourceid=12642>. The course was recognized as among the top 10 most downloaded resources on TRAILS for 2013.
2. Jack Butler, an undergraduate at Washington College, under the faculty advisement of military sociologist Ryan Keltz, created a documentary about women in the military during his senior year, 2015–2016. See “The Modern Athena: Full Gender Inclusion of the United States Military” online at [https://www.youtube.com/watch?v=l7\\_-XFoVl8g](https://www.youtube.com/watch?v=l7_-XFoVl8g).

# Hybrid Conflict and Effective Leadership Training

Capt. Evan Kowalski

Fort Eustis, Virginia

Jody M. Prescott

University of Vermont

## Abstract

Hybrid warfare is a significant aspect of today's operational environment, and it poses unique and challenging ethical scenarios for leaders at all echelons. More specifically, leaders at the tactical level face ever-changing threats that require quick decision-making with limited information. Leaders with strong ethical foundations informed by the law of armed conflict (LOAC), guidance on the use of force, and shared unit values are better equipped to counter this challenge. Recognizing this, the 16th Special Troops Battalion (16th STB), a U.S. Army unit headquartered in Baumholder, Germany, recently assessed its leadership development program and found that the unit did not provide sufficient opportunities for its commissioned and noncommissioned officers to explore and develop their ethical decision-making processes and to exercise them from moral, legal, and professional perspectives. Using the Nazi genocide of European Jews in World War II as a case study in developing a new leadership development curriculum, the 16th STB used a combination of different educational techniques including experiential learning and competency-based training to place its leaders in positions where they could critically examine their own decision-making and value systems.

This article will explore hybrid warfare and its associated ethical implications and then turn to academic research, training doctrine, and unit training to illustrate current approaches to dealing with these issues. Next, it will explain the process by which the 16th STB conducted its revamped leadership development curriculum to address these issues. Perhaps most important for military ethics and LOAC instructors, the 16th STB conducted a survey of the training audience



shortly after completion of the program, which suggests additional steps that could be taken to better integrate leadership development and professional military education in the U.S. Army as a whole.

**T**oday, NATO forces face a unique set of threats in the form of “hybrid warfare.” This term has many different definitions, but at their core, these definitions include the presence on the battlefield of actors (both real and virtual) either who do not belong to traditional nation-state military formations or who conceal their true identities as they conduct operations against their adversaries (Johnson, 2018). Often operating just under the level of open armed conflict, these actors include civilians, transnational groups, terrorists, insurgents, private security contractors (PSCs), and even “patriotic hackers,” who align themselves with the goals of different nations but whose actions are not attributable to those countries under international law.

As these threats to Western militaries evolve and grow, there is increasing concern within the Department of Defense (DOD) that professional military education (PME) at the brick-and-mortar schoolhouses has failed to keep pace with operational developments and is not producing leaders, planners, and operators sufficiently prepared to face these new realities. In the unclassified *Summary of the 2018 National Defense Strategy of the United States of America*, the DOD found that “PME has stagnated, focused more on the accomplishment of mandatory credit at the expense of lethality and ingenuity” (U.S. Department of Defense [DOD], 2018, p. 8). As to the direction forward to address this problem, the DOD emphasized that the forc-

**Capt. Evan Kowalski, U.S. Army**, is a logistics officer stationed at Fort Eustis, Virginia. He holds a bachelor's degree in international history from the United States Military Academy at West Point. He has devoted his time to the study of genocide and the Holocaust, and he was the only non-PhD or theologian selected to attend the 2016 United States Holocaust Memorial Museum's Faculty Seminar on Religion and Ethics. During the summer of 2017, he was the only nongraduate student and only American to participate in the Bergen-Belsen International Summer School, where he presented his undergraduate thesis research.

**Col. Jody M. Prescott, U.S. Army, retired**, is a lecturer at the University of Vermont, where he teaches environmental law, energy law and climate change, and cybersecurity law and policy. He researches and writes on the topics of gender, cyber, climate change, and ethics and leadership, and is the author of *Armed Conflict, Women and Climate Change*, which explores the operationalization of gender in the near-term international security environment. He holds Master of Law degrees from Georgetown Law and The Judge Advocate General's Legal Center and School. He was an assistant professor at the United States Army Command and General Staff College and the United States Military Academy while on active duty.



es needed to “emphasize intellectual leadership ... while embracing new technology and techniques to counter competitors” (DOD, 2018, p. 8).

It is unlikely that there is a single solution to this problem. However, recent work by a U.S. Army combat support battalion suggests an education-and-training model that could be useful in building ethical resiliency and responsiveness in small-unit leaders. In the autumn of 2017, the 16th Special Troops Battalion (16th STB), headquartered in Baumholder, Germany, and with companies in other parts of Germany and Italy, assessed its leadership development program. The battalion’s leadership concluded that the existing program provided insufficient opportunities for its commissioned and noncommissioned officers to explore and develop their ethical decision-making processes and to exercise them from moral, legal, and professional perspectives.

This article will first explore hybrid warfare and its associated ethical implications and then turn to relevant research, training doctrine, and training to illustrate current approaches to addressing these issues. Next, it will explain how the 16th STB, using the Nazi genocide of European Jews in World War II as an overarching theme, revamped and implemented a leadership development curriculum to address decision-making from moral, legal, and professional perspectives. Most critical for military ethics and law of armed conflict (LOAC) instructors, the battalion conducted an anonymous survey of the training audience shortly after the completion of the program to determine whether they believed the training had met its educational goals (a measure of validity). Analysis of the survey results suggested effective steps that could better integrate leadership development and PME as a whole, emphasizing the growth of critical thinking and ethical decision-making skills within the small-unit environment. More research is needed across the Army, but this analysis is a starting point.

## Hybrid Conflict

To understand hybrid warfare and its potential impact on leaders’ ethical decision-making in our current military organizations, a definition must first be established. Hybrid warfare might not be a new concept, but it nonetheless poses characteristically unique and continuously changing challenges to military leaders. In a survey of the history of hybrid warfare beginning with ancient Rome, Murray and Mansoor (2012) investigated its historical aspects in their work, *Hybrid Warfare: Fighting Complex Opponents from the Ancient World to the Present*. Murray and Mansoor (2012) defined this type of warfare as, “conflict involving a combination of conventional military forces and irregulars (guerrillas, insurgents, and terrorists), which could include both state and nonstate actors, aimed at achieving a common political purpose” (p. 2). As the type of actors involved in hybrid warfare has continually morphed over time, theorists have attempted to broaden their understanding of the actors and their effects on the battlefield.



In *Armed Groups: The 21st Century Threat*, Thompson (2014) highlighted a major characteristic of today's hybrid threat by investigating armed groups across the world. He concluded that the majority of these armed groups are prevalent in unstable states and that the United States and its allies have engaged these types of forces predominately in the course of intrastate conflicts. He noted that it is imperative for the United States and partner militaries to understand the nature of and warning signs associated with these engagements, as failure to do so might lead to destabilization of friendly governments and hinder the accomplishment of national objectives (Thompson, 2014). These considerations are objective and utilitarian. From a leadership perspective, they have a potentially obscuring effect on the ethical concerns that must be dealt with on the way to achieving these goals.

## Ethical Implications of Hybrid Conflict

Regarding hybrid warfare, Murray and Mansoor (2012) contend, “[Military] leaders at all levels must gather lessons learned from ongoing military operations and alter doctrine, operational concepts, and strategy to meet unexpected challenges and opportunities. In a nutshell, leadership matters” (p. 16). This is an area of leadership where commanders must take ownership of the decision-making process as well as the ethical implications of the actions of their formations. This is an area in which commanders not only need to make the right decisions, but they also need to model the methodology they used to arrive at those decisions for their subordinates.

For over a decade, the U.S. Army has formally recognized the ethical challenges of operating in complex environments. In Field Manual (FM) 3-24, *Counterinsurgency*, it states, “Ethically speaking, COIN environments can be much more complex than conventional ones. Those in leadership positions must provide the moral compass for their subordinates as they navigate this complex environment” (U.S. Department of the Army [DA], 2007, p. 245). This doctrine recognizes that leaders at the strategic, operational, and tactical levels in these types of operations all make decisions that potentially determine the fates of military personnel on one side and the local civilian populace on the other.

In a 2012 study of U.S. Marine Corps company commanders' experiences in hybrid conflicts in Iraq and Afghanistan, this complexity is characterized at the small-unit level by four primary factors (Committee, 2012). First, small units were geographically isolated from one another. Second, commanders were often challenged by the diversity of the operational activities they were expected to undertake, ranging from intense kinetic engagements to nation-building efforts. Third, enemy combatants intermingled with local populations, posing a particular challenge to both commanders and their troops. Finally, leaders faced the requirement to make “rapid, high-consequence decisions under rules of engagement aimed at supporting an effective counterinsurgency strategy by minimizing unintended consequences of kinetic actions” (Committee, 2012, p. 29).



## Guidance on the Use of Force

One of the most important measures that militaries have taken to grapple with complexity issues is to provide clear and actionable guidance on the use of force by their personnel. For example, the United States uses Standing Rules for the Use of Force to guide commanders and soldiers in domestic U.S. situations and Standing Rules of Engagement (ROE) for use in deployments abroad to regulate the application of lethal force and mitigate potential civilian losses (DA, 2017, p. 77). Limiting civilian casualties goes beyond humanitarian aims and the requirements of LOAC, as it also has a utilitarian aspect directly related to mission success, especially in the context of hybrid warfare. Leaders want to gain support, or “win the hearts and minds,” of local populations while maintaining a positive public image in the eyes of both the domestic and international community. However, excessive or unnecessary civilian casualties can readily decrease local populace support and cause public outrage. These factors often weigh heavily on sustaining continued operations within a given region, especially from a political standpoint where public opinion can place pressure on politicians’ and military officials’ strategic involvement and tactical protocol in certain cases.

On this point, the Department of the Army has stated, “In all types of operations, failure to mitigate CIVCASs [civilian casualties] can jeopardize success” (DA, 2012a, p. 7). Unnecessary civilian casualties can lead to general public unrest and a lack of support within a host nation. The NATO-led International Security Assistance Force (ISAF) established a Civilian Casualty Mitigation Team in 2011 and an Afghan-ISAF Joint Incident Assessments Team to conduct analyses and determine any possible adjustments to NATO force tactics that could result in fewer civilian casualties. (Prescott, 2016, p. 330). Further tailored applications to address this concern include a number of examples from Afghanistan such as tactical directives issued by senior commanders, evaluation of investigative reports involving civilian deaths to identify potential systemic problems in ROE training and understanding, and establishment of specific cells in headquarters staff devoted to identifying and tracking instances of civilian casualties (Prescott, 2016, pp. 265–266, 268–270).

The ethical implications of conforming to the applicable guidance on the use of force are profound. As Davidson (2005) noted in his article “War and the Doubtful Soldier,” questions regarding the morality of military action, as set out in just war theory, parallel “international legal restrictions on the proper conduct of armed warfare” (p. 91). Thus, combatants “who struggle with and must overcome their natural moral aversion to killing another human being ... seek justification for their actions” (Davidson, 2005, p. 94). It is not uncommon in contemporary conflicts to find instances where adversaries specifically target these ethical considerations in the minds of Western forces with misinformation campaigns and the use of human shields, for example (Gardner, 2010; Nebelay, 2011). It is one thing to be a conscientious commander concerned about his or her unit’s use of force on the battlefield,





but what about nominally “friendly” forces operating in the same battle space who are not so diligent about these ethical considerations?

## Private Security Contractors

Private security contractors have featured significantly in the conflicts that have occurred since the end of the Cold War, and their activities have ethical implications for commanders in the field. PSCs can range from static guards outside installations at one end of the spectrum of activity all the way to personnel in actual combat units (Brown, 2018). One of the most recent examples of this is the battle that occurred between Russian mercenaries and U.S. forces in Syria in February 2018 (Gibbons-Neff, 2018). Mercenaries pose a unique threat as they operate outside the traditional bounds of LOAC. Applying traditional legal provisions and moral principles to PSCs is challenging because it can be difficult to discriminate between them and other forces or protected civilians, and because their legal and operational status under host-nation law is often unclear and politicized (Prescott & Male, 2018, pp. 658–662).

In Afghanistan, there were very serious concerns that Afghan PSCs were both corrupt and actively working with the Taliban. For example, the U.S. air strike in Azizabad in 2008, which ended up killing numerous civilians and significantly damaging the United States’ relationship with the government of Afghanistan, was actually in support of a raid against a Taliban commander who was expected to be meeting the chief of the company that provided security services for a nearby U.S. airbase. A post-strike investigation revealed that some of the “insurgents” engaged by U.S. Special Forces in the raid actually might have been working as security personnel (Prescott & Male, 2018, p. 658). These unpleasant realities clearly complicate the lives of commanders from both an operational perspective and an ethical one.

## Cyber Conflict

The cyber domain is a relatively new venue for hybrid war, and it poses a new perspective on leadership ethics. While intercepting enemy communications is certainly not new, the scale of the networks transmitting this information and the dependence of modern militaries upon these networks pose potentially catastrophic scenarios. In *Dark Territory: The Secret History of Cyber War*, Kaplan (2016) assessed that there have yet to be concrete ethical positions established amongst members of the international community such as banning cyberattacks affecting critical civilian infrastructure (i.e., against the industrial control systems of dams, waterworks, power grids, and air traffic control equipment) (p. 273).





Continued scholarly work has been done to outline the potential application of international law, including LOAC, to these types of attacks, but there is incomplete consensus among LOAC experts as to how exactly applications of this body of law would play out. Further, as shown by the recent Paris Call agreement, although over 50 nations agreed to nine separate goals of cyber regulation (such as preventing interference by foreign actors in elections and “hacking back” by private companies in response to cyberattacks), a number of cyber-capable nations did not sign, including the United States, China, Russia, and Israel (Matsakis, 2018).

As Clarke (2010) has pointed out, complicating the application of these norms is the potential speed at which cyber war could unfold: “The speed at which thousands of targets can be hit, almost anywhere in the world, brings with it the prospect of highly volatile crises” (p. xi). Clarke summarized his perspective on the reality of cyber warfare by stating that it could happen at the speed of light, that it was global, and that it had already begun (p. 31). Not all warlike conduct in cyberspace would occur at this speed; in fact, some attacks might take months or even years to fully unfold. An example of this is election meddling, where hackers could influence events both actively and passively through their deliberate actions, but the impacts of these acts might not register on an electorate in a manner that is quickly recognizable (Nakashima, 2018).

In developing responses to hybrid-warfare threats, many nations seem to be focusing on technical measures and physical tactics and techniques. However, as shown by Russian actions in the Crimea, hybrid-warfare threats are often intangible and subtle, and they are often designed to attack the attitudes and decision-making processes of military personnel. Examples include subverting military officers and causing them to leave their posts and jamming key Ukrainian officials’ mobile phones as the Russian invasion unfolded (Iasiello, 2018, p. 54; Polityuk & Zverev, 2017). Coupled with quick-acting, cyber-enabled misinformation techniques, actions such as those affecting the Ukrainians can place leaders in difficult moral scenarios that challenge the values and the ethical foundations upon which officers and soldiers rely to make sense of confusing and often chaotic operational situations (Oullette, 2018). Leaders who possess a strong ethical foundation are more apt to successfully navigate the complexities posed by a modern hybrid-threat environment. Therefore, hypothetically, they could be more likely to make more timely and sound ethical decisions. That said, more research is needed to more fully support this hypothesis.

## Research, Training Doctrine, and Training in the NATO Context

Hybrid warfare is unquestionably a focus of Alliance and U.S. efforts in the European theater, and any U.S. military action is likely to be part of a multilateral effort. To place the 16th STB’s leadership development curriculum in the proper context, it is useful to briefly review what is happening in the NATO context with regard to re-



search on hybrid warfare, the thrust of training doctrine, and the conduct of training itself before looking at it in the U.S. context.

**Research.** NATO members have recognized hybrid threats at the national and strategic defense levels as a high priority in their respective international security concerns. Consequently, NATO and partner countries have established several relevant and useful centers such as the Centre of Excellence for Countering Hybrid Threats in Helsinki, Finland; the Strategic Communications Centre of Excellence in Riga, Latvia; and the Cooperative Cyber Defence Centre of Excellence in Tallinn, Estonia (“NATO Welcomes Opening of European Centre,” 2017). These centers use their niche capabilities to focus on strengthening coordination with the European Union (EU), increasing intelligence capabilities, and providing resources to training programs and exercises in countering hybrid threats. These centers, along with the increase in large-scale training events incorporating hybrid-threat scenarios, are a clear demonstration of how seriously NATO and its member states are prioritizing the threats posed by hybrid warfare.

Thiele (2015) suggests that training for hybrid warfare should emphasize cross-functional command-and-control mechanisms allowing for interoperable responses. Additionally, education and training in preparation for hybrid war should address innovative thinking, flexibility of action, and enhanced cognitive skills (Anton, 2016). Consistent with this research, the recently revised publication *A Civil-Military Response to Hybrid Threats* outlines scenarios, vignettes related to hybrid warfare, and the need to build resilience amongst personnel (Cusumano & Corbe, 2018). The need for these skills applies to all members of NATO, as hybrid threats in the North Atlantic region pose a paramount concern for all within the Alliance.

**Training doctrine.** Although NATO training doctrine does not explicitly emphasize the need for innovation, United Kingdom training does emphasize the need for approaching problems as they present themselves, rather than trying to jam them into some cookie-cutter doctrinal approach (“Education and Training,” 2019). For example, British Army Doctrine Publication (ADP) AC 71940, *Land Operations* (2016), states, “Firstly, land forces require the command and cognitive skills to be flexible and adaptable. Essential to all aspects of flexibility is a military culture that supports mental agility and initiative” (p. 16). Second, the doctrine notes, “a broad doctrine provides a common foundation on which land forces can build when faced with potentially new situations. Although the principles of doctrine endure, tactics, techniques and procedures need to evolve rapidly, adapting to the specific situation” (p. 16). Although not a NATO member, Australia works closely with the Alliance and uses similar doctrinal guidance. For example, Australian Army training doctrine encourages taking initiative and creating realistic training while using simulations (Australian Army, 2018, p. 14).

**Training.** Similar to the United States, NATO has recognized hybrid threats as an important priority to be addressed in high-level training (“NATO Countering the Hybrid Threat,” 2011). Trident Juncture, for example, serves as the premier exercise where NATO forces cooperate to bolster the collective strategies of the Alliance



“Exercise Trident Juncture,” 2018). This training event simulates various scenarios combining both conventional and hybrid threats to include cyberattacks and ballistic missile defense. Gen. Jean-Paul Paloméros, the former supreme allied commander transformation of NATO, stated,

Those [hybrid threats] are very demanding risks and threats that we have to face almost all around the globe because a lot of countries are putting a lot of money to reinvest in their defense. We must take this into account in the NATO equation. (Weisgerber, 2015)

High-level NATO exercises such as Trident Juncture recognize that senior political and military leaders at the strategic and operational levels make the most impactful and sweeping decisions. The most direct and personal challenges, however, likely fall to leaders at the tactical level. These leaders are the ones who actually experience the direct real-life impact of implementing the orders of a higher authority rather than having them filtered through near real-time drone video feeds and situation reports.

However, many exercises that deal with hybrid warfare appear to largely focus on the development of technical skills in dealing with the means and methods of this form of conflict. For example, along with other NATO forces, German *Bundeswehr* (armed forces) units recently participated in Locked Shields, a NATO exercise that focused on protecting computer networks. German units also took part in other exercises focused on countering cyber and information threats, such as EU CYBRID 2017, EU PACE 17, and CMX 17 (Schulzki-Haddouti, 2018). These exercises included various scenarios such as antiglobalization groups, identifying “fake news” and false reports, and managing protest demonstrations (Schulzki-Haddouti, 2018). However, it is not clear if these exercises significantly tested the human element of leaders’ decision-making skills and patterns within this new environment at the small-unit level.

The lack of emphasis on the critical ethical, moral, and legal components of decision-making in complex environments within its own training program is what led the 16th STB commander to have his leadership development team come up with a different approach to leadership development at the battalion level and below. In a hybrid threat or other complex operational environment, the decision-making processes of both commanders and soldiers could be based on very fleeting and incomplete information, and they could be forced to come up with solutions in a radically reduced time frame. As Hedges and Al-Arian (2008) wrote, “There, a flash of motion. Is that a weapon? Is that a child? Is that a child with a weapon? Is that someone aiming at my buddy?” (p. 21).

Similarly, social media can distort the understanding of the battle space in real time. One example of this phenomenon is the leveraging by Islamic State of social media platforms to catalyze fear and exaggerate its strengths as it prepared to go on the offensive by posting ominous and militant-themed photographs and



the top-trending “AllEyesOnISIS” moniker (Singer & Brooking, 2010, p. 5). It is crucial that tactical leaders are trained to understand the nature of the complex environments they might be operating in so that they can make quick and ethically sound decisions and help instill these same thought processes in their subordinates. With these considerations as a backdrop, it is now time to turn specifically to U.S. efforts in these areas.

## Current U.S. Army Training Doctrine and Guidance

In 2012, the U.S. Army Training and Doctrine Command updated its guidance for training and leadership development in ADP 7-0 and Army Doctrine Reference Publication (ADRP) 7-0, both titled *Training Units and Developing Leaders* (DA, 2012b, p. 1-2; DA, 2012c). The publications provide an overview of the roles of training and leadership development, its principles, and unit management. Both conclude that it is ultimately up to a unit’s commander to offer the proper time and resources to ensure effective leader development occurs—meaning that every commander has a responsibility to assess his or her leadership development program to determine whether it is yielding the desired results in the unit’s officer and noncommissioned officer leadership.

This doctrine broadly and sufficiently sets out principles to guide the development of leaders to operate in unknown environments. It gives leaders the leeway to tailor training to their specific operational environments in creative and innovative ways. Reasonably, today’s dynamic operational environment calls for a focus on hybrid threats due to their likelihood of appearing on or near the battlefield in various and unpredictable forms. Given the wide span of influence of hybrid threats and their potentially amorphous nature, it is important for units to leverage the principles outlined above while also addressing specific issues associated with complex threats such as those posed by hybrid actors.

Paradoxically, small-unit leaders today are operating with the concurrent realities of greater centralized supervision by military leaders and less actual personal supervision in austere areas. For example, Lt. Gen. Mike Short, commander of the NATO air campaign in Kosovo, has often related the story of directing his son, an A-10 pilot, through the Combined Air Operations Center as his son was attempting to target certain Serbian tanks (Short, 2000). Conversely, technology has its limits, and young leaders often find themselves working in isolated locations with significantly less personal guidance from superiors. Gen. Mark A. Milley, then chief of staff of the Army, addressed these challenges from the perspective of “disciplined disobedience,” stating that a “subordinate needs to understand that they have the freedom and they are empowered to disobey a specific order, a specified task, in order to accomplish the purpose. It takes a lot of judgment” (Lopez, 2017). This type of disobedience should not be “willy-nilly,” he says but rather should be “disciplined ... to achieve a higher purpose” (Lopez, 2017).



Importantly, this sort of tactical disobedience would in fact be disciplined because it would occur within important constraints—doctrine, training, and tested tactics, techniques and procedures, as well as the applicable directives on the use of force. And, while Milley may not have meant it directly, this “disciplined disobedience” would also apply in situations where leaders find themselves balancing ethical, legal, and moral aspects of operational situations in their decision-making. In combatting hybrid and other complex threats, what is happening in leaders’ minds as they assess and weigh these relative values may in fact be one of the most important areas in command decision-making. How should leadership-development training programs be constructed to instill the reasoned and disciplined judgment necessary for this sort of decision-making to happen in a fairly predictable way?

Ultimately, it is paramount for leaders to develop their own ethical lenses and reasoning reflexes to effectively navigate through these challenging decisions. Too often, education of this sort seems to be relegated to the schoolhouse rather than conducted in the unit environment where these decisions will need to be made. Too often, training seems focused on demonstrating easily measured technical skills rather than addressing the important intangibles of ethical and reasoned decision-making. Mindful of these concerns, the 16th STB leadership team purposefully chose to construct its training program around an uncommon issue, yet a thorny problem from a historical perspective, in the modern Western military experience—the decision whether to obey orders that are arguably unethical, immoral or illegal.

## Learning in Military Education and Training

In taking this somewhat unconventional approach, the 16th STB purposefully decided to break out of the traditional field-training silo and embrace schoolhouse educational techniques and content to emphasize learning as an organizing theme rather than categorizing the delivery of the instruction. The Army doctrine described above lays out sufficient guidance for conducting unit-level training and leadership development as a whole, and it does not explicitly distinguish between learning, education, and training. Important benefits result from combining these concepts together, such as fulfilling individual human aspirations for education and instilling intellectual agility, although these important intangibles might be difficult to measure (Kime & Anderson, 2019).

ADP 7-0 notes that experiential learning is the most effective learning technique for the warfighter at the tactical level, but its focus is on the operational and training context, and it does not address specific educational approaches (DA, 2012b, p. 1-2). Perhaps this reflects the continuing debates among scholars and Army professionals as to the most useful approach in educating Army leaders in



the future. Some see the need for a more practical application of academics, such as a “case method” approach, whereas others argue whether focusing more directly on job-oriented/military learning rather than a broader liberal arts education is better in general (Gudmundsson, 2018; Morgan-Owen, 2018).

The 16th STB leadership recognized this challenge and found it necessary to deliberately take time to both train and educate its leadership in an innovative way to maximize learning at both the individual and the group levels. The battalion leadership sought out various learning methods and techniques to create a comprehensive and holistic curriculum for its participants. These techniques included experiential learning and competency-based training that would place its officers and sergeants in positions where they could critically examine their own decision-making and value systems.

In line with the guidance laid out in ADP 7-0 and with its own assessment of potentially effective educational techniques, the 16th STB primarily pursued an experiential-learning-based curriculum. In her comprehensive overview of experiential learning, Swartz (2012) laid out a description of classifications and best practices for the implementation of experiential learning. She identified different types of experiential learning, who benefits from the learning, and concrete measures useful in planning and incorporating experiential activities into a curriculum. The primary goal of experiential learning in her view was to apply knowledge to experience in order to develop skills or new ways of thinking along with a foundation of interdisciplinary and constructivist learning (Schwartz, 2012). Military audiences appear to be receptive to this type of learning in general because it allows students to use their own personal experiences in determining how to solve problems and which lessons to take away from the instruction based on their individual backgrounds.

One important step of experiential learning is reflection. According to Biniecki and Donley (2016),

If one considers past experiences as helping learners make sense of current experiences, then reflection on these past experiences may play an important role in learning. The ways learners construct knowledge and why and how they reflect, for example, at an exhibit, are part of the learning process and may be intricately connected to the context of the learning. (p. 4)

This is especially critical in dealing with sensitive matters where individuals are able to draw from experienced emotional responses such as those obtained from visiting memorial sites.

Another focused educational technique is competency-based learning. Kolb and Wolfe (1981) conducted extensive research investigating the relationship between experiential learning and competency-based training as it pertains to lifelong learning and adult development. They argue that certain professions should move away



from an outcomes-based methodology for development and focus on specific competencies. Kolb and Wolfe (1981) put forward,

From a social control point of view, professions seem to have originally emerged in the areas of human activity, e.g., medicine, religion, law, where it is not feasible to judge performance on the basis of outcomes. Since one cannot judge a doctor on whether or not a specific patient dies or a lawyer on whether a specific case is won or lost the emphasis in professions is on controlling the means of performance rather than the outcomes. (p. 316)

They conclude, “One is therefore professionally competent if he or she performs the accepted professional activities or methods adequately regardless of their results” (p. 316).

## 16th STB Curriculum

The 16th STB developed a unique program that took advantage of its close proximity to especially relevant historic sites in Central Europe. As its overarching theme, the program was based on the assessment and examination of leaders’ decision-making in the context of case studies of genocide during World War II. While this vast scale of genocide presents a massive array of themes related to humanity as a whole, at a very granular level it also provides specific, useful examples of leader decision-making challenges in complex operational and hybrid environments.

The battalion chose a case study of a German reserve infantry battalion in German-occupied Belarus in 1941 as a central part of its leadership development program and embedded it within a sequence of introductory lectures on genocide, a practical writing exercise involving a mock administrative investigation, and group discussion. The program culminated with site visits to Auschwitz and the Palace of Justice in Nuremberg, where the most infamous Nazi war criminals were tried by the International Military Tribunal after World War II. The overall objective was to strengthen the ethical foundations and decision-making abilities of leaders in the battalion by exposing them to a variety of experiential learning and competency-based lessons that led them to critically assess their own assumptions and values and how they applied them in making tough decisions.

**Introductory lectures at home station.** The curriculum took three months to complete. Through videoconferencing that occurred every two weeks, each event included all participants across the battalion in both Germany and Italy. Every event had a corresponding prerequisite assignment for all participants. First, the unit leaders read segments of Bergen’s *War and Genocide: A Concise History of the Holocaust* to provide them with a general understanding of the Holocaust and its historical context (Bergen, 2003). An STB officer who was a history major with a background





in Holocaust studies then conducted a traditional-style lecture followed by a group discussion to review important points with the participants.

Next, the training audience read a case study designed for leadership development, *Ordinary Soldiers: A Study in Ethics, Law, and Leadership* (Prescott, 2014b). The Center for Holocaust and Genocide Studies at West Point and the United States Holocaust Memorial Museum created the case study and lesson plan, which focuses on company-level leaders who were in command as part of a reserve infantry battalion in occupied Belarus in October 1941. The lead author of the case study delivered the lecture from a National Guard base in the United States and then conducted a question-and-answer session for the training audience.

In the case study, the battalion commander gave each of his three maneuver company commanders a single illegal order in the clear: to kill all of the Jewish civilians in their respective areas of operation (Beorn, 2014, p. 121). One company commander, a member of the Nazi *Schutzstaffel*, or SS, complied immediately. The second company commander, a World War I veteran, considered the order and then explicitly rejected it. The third company commander, also a World War I veteran, sought to avoid carrying out the order at first, but once the battalion commander confirmed the order in writing, he directed the company's first sergeant to conduct the executions while he attended to administrative duties.

The authors of the case study specifically created it for a military audience because the situation in which the company commanders were placed clearly illustrated the ethical dilemmas confronting small-unit leaders in deciding whether to execute an illegal order. The 16th STB found that the case study applied aptly in teaching participants about the complexities of hybrid threat-environments. This scenario was similar to hybrid-threat environments, and leaders needed to make sound decisions with limited information within a shortened window of time. Further, these decisions revolved around a group of people who were lumped together with insurgents by senior Nazi leadership but had never posed an actual threat in the company areas of operations. In the end, the case study showed that despite facing harsh conditions of war and radical regimes, the leaders and soldiers within the battalion were ordinary men who still possessed the ability to recognize illegal orders and make sound moral and legal decisions (if they wanted to). This could demonstrate the “disciplined disobedience” as described by Milley, where leaders possess the necessary technical, moral, and ethical foundations to do something different from exactly what their superiors had ordered them to do if it is not the right moral action.

**Practical exercise.** Following the reading assignment, the next session in the leadership development program introduced the audience to U.S. Army Regulation (AR) 15-6, *Procedures for Administrative Investigations and Boards of Officers* (DA, 2016). An AR 15-6 investigation is the standard U.S. Army process used by commanders to appoint investigating officers to look into incidents or allegations and to generate findings and recommendations as to what should be done. Investigating





officers are usually appointed when there are suspicions of unethical, immoral, or illegal acts within the respective commander's organization.

The leadership development program used these investigations as a practical vehicle to develop competencies and critically examine the actions of the *Wehrmacht* (German armed forces) company commanders. Experience has shown that combining high-level tasks involving judgment with practical tasks can lead to both training efficiencies and improved performance by troops being trained (Larsen, 2005).

A military attorney provided legal support to the battalion participants on the proper way to conduct and write an AR 15-6 investigation. This presentation was useful because it established an ethical decision-making framework. To emphasize this, the *Ordinary Soldiers* case study's lead author delivered a lecture via videoconference on the important points of the reading and discussed the linkages in the case study between leader ethics and decision-making while having to deal with hybrid threats.

At the conclusion of the discussion, the participants were placed in roles of investigating officers and directed to write a mock AR 15-6 investigation report to be completed within two weeks. In the report, they had to identify what they found as the reasons why the executions of the Belarusian civilians in 1941 occurred as they did and make recommendations to the commander as to how he might incorporate lessons learned from the historical case study. An important teaching point, participants were not graded nor were they instructed to focus on any specific outcome. Rather, the assignment guidance emphasized focusing on the competency of the critical thinking required to execute the investigation process.

The lead author of the case study had served as the chief legal advisor to the ISAF commander in Afghanistan. He applied his experiences from Afghanistan to the conduct of the battalion's leadership training program, reviewing more than 50 submitted investigation reports and providing individual written feedback to each of the participants via email.

**Staff ride.** After receiving verbal feedback from both the commander and the lead author in a final question-and-answer period conducted via videoconference, 80 leaders from the 16th STB traveled to the site of the Auschwitz complex, which served as the foundation of the experiential learning within the curriculum (Borden, 2017). At the complex, they took extended guided tours through the camps, participated in seminars coordinated through the memorial site curators, and visited nearby museums including the Auschwitz Jewish Center. Each night following the site visits, the 16th STB chaplain led reflection sessions with the leaders covering the challenging and often emotional experiences each participant faced. This allowed each participant to draw from his or her own emotional experiences and build upon them with the experiences of others. Following the visit to Auschwitz, and in keeping with the legal component of the training, the participants stopped at the Nuremberg Palace of Justice. There they learned about the legal aftermath and its impact on the development of the 1949 Geneva Conventions and present-day LOAC.



**Survey results.** Through conducting a postprogram survey, the 16th STB determined that it had largely achieved its overall goal of further developing the ethical foundations and decision-making abilities in its leaders through a balanced combination of education, training, and experience, specifically linked to complex threat environments such as hybrid warfare and the ethical implications of making decisions in those environments. After the conclusion of the program, the battalion conducted an anonymous survey managed by the unit chaplain to determine what the participants deemed to be successes, what areas of the leadership development program could be improved, and where benchmarks needed to be set for future events. The results of the survey offer useful insights into how the participants reacted to certain aspects of the training.

Of the 40 participants responding to the survey, 75% were officers and 25% were noncommissioned officers. A majority of the training audience assessed that the leadership development curriculum increased their understanding of LOAC principles—69% agreed that after the full leadership development training program, their understanding of LOAC had improved. Additionally, 85% of participants believed they were now more aware of different tools or approaches that might help them in making sound moral and ethical decisions as leaders. Lastly, 85% of participants believed completing the training program made them more aware of the impacts of ethical decision-making by leaders upon peers and subordinates. These results suggest a strongly positive trend in realizing the training program's main goal of linking leadership with ethical and legal principles to be better equipped to conduct sound and timely decision-making in complex environments such as those characterized by hybrid threats.

Regarding the *Ordinary Soldiers* case study, 92% found it largely sufficient or sufficient to understand the challenging circumstances in which the small-unit leaders were placed. This suggests that the case study presents itself clearly and with sufficient context so that the training audience understands what happened in terms of the ethical and leadership dilemma that the German company-level leaders faced in deciding how to handle an illegal order in the midst of a complex conflict scenario.

The AR 15-6 exercise was designed to address several leadership principles by fostering adaptive leadership and critical and creative thinking skills. In terms of systematically identifying the causes and effects of a complex problem, 63% found it at least largely sufficient. Regarding the lead author's individual feedback and group discussion on the overall results, 67% found it at least largely sufficient in preparing for future investigations as well as for appreciating the process of creating a successful leader development program. This suggests an overall positive trend in individual proficiency and that participants found both individual and group interaction to be beneficial in learning. This also highlights the effectiveness of the competency-based learning approach where participants worked on developing critical skills.

Survey results suggest that the site visits yielded the highest success rate and had the most direct impact on participants of all of the different leadership-development-program components. The site visits were found to be largely sufficient or



sufficient by 80% of respondents in bettering their individual understanding of the real-world impacts of flawed ethical decision-making by leaders, and 82% found the site visits were largely sufficient or sufficient in bettering individual understanding of obligations as a leader to set and enforce value-driven standards. Lastly, 82% found that out of the entire program, the site visits had the most profound personal impact upon them. This presents the importance and effectiveness of incorporating experiential learning into curriculums. This does not necessarily mean that leadership-training programs require physical site visits to be successful. However, site visits can evoke emotions and allow participants to experience the subject matter in a physical sense, often stimulating stronger responses.

As a whole, the program built unit cohesion—92% of the participants felt an increase in this after the completion of the program. This included an assessment by the respondents of both company and battalion staff relationships. Ordinarily for units in the field, particularly battalion level and below, these shared experiences are generally a function of training specifically oriented on mission tasks and actual operations. As the 16th STB's leadership development program shows, however, training at this level can also include important but tough-to-crack leadership development issues that do not necessarily lend themselves to easy quantitative evaluation, which are often not addressed in the field.

## Potential Lessons Learned

The 16th STB gained insight into planning future programs as a result of the survey because it also solicited feedback for general improvement recommendations. Most of the responses addressed potential changes to logistical coordination, the curriculum, and the participation of individuals in the program. One critique concerned the value of including the noncommissioned officers with the officers during certain parts of the program. This especially pertained to the AR 15-6 exercise. Perhaps in future events, practical exercises could take the form of situational training lanes where roles and scenarios were created dependent upon participants' rank. These types of events may also offer more real-world and combat-like scenarios for participants.

Another improvement suggested in the survey results was the desire to break into smaller groups for discussions. The majority of the seminars incorporated a lecture for the entire audience followed by an interactive group discussion as a whole. Conceivably, it would be more beneficial to allow time to break into smaller groups to discuss various questions and concepts and then present each respective groups' findings to the whole audience. This decentralized method would help ensure that each individual had the chance to participate more rather than just listening. As the *Ordinary Soldiers* lesson plan has been used with U.S. Army cadets in the Reserve Officers' Training Corps programs at the University of Vermont and



Norwich University, the training audiences have been given small-group discussion time, with a group size of six or seven participants being ideal (Prescott, 2014a). To effectively use this teaching approach through videoconferencing, however, would require solving a number of logistical and technical challenges.


The 16th STB leadership also learned new techniques in coordinating the different parts of the program that could apply to planning future events. This included leveraging technology to provide access to remote subject-matter experts, alternating teaching methods, and taking advantage of proximity to historic sites. Given the geographic separation between participants, the battalion applied distance-learning techniques and coordinated videoconferences for all discussions. This allowed all participants to communicate in real time and experience the presentations both audibly and visually. Though face-to-face interaction is a preferred learning environment, videoconferencing mitigated cost issues associated with time, distance, and overall feasibility. Finally, the curriculum included various exercises and assignments to meet the different learning styles of participants. This included reading assignments, lectures, practical exercises, group discussions, and site visits. Studies have shown that incorporating approaches geared to different learning styles leads to a higher rate of student accessibility and engagement, and this appears to have been confirmed indirectly by the survey results in this instance (“Effective Adult Learning,” 2012). For future training events, the employment of diverse teaching methodologies should therefore be incorporated at the beginning of curriculum planning as a design-and-delivery priority.

## Conclusion

In a recent response to the changing international security environment, the U.S. Army published a concept paper that explores the types of forces that would be needed in the 2025–2040 timeframe to deal effectively with hybrid threats. It proposed the creation of smaller units, either forward-deployed or capable of moving into a theater quickly, with sophisticated capabilities that would allow them to continue to function even when cut off from main U.S. units (U.S. Army Training and Doctrine Command [TRADOC], 2017, p. 23). Interestingly, one of the key capabilities of these units would be the ability to conduct “engagement,” which was defined as “the combination of physical, informational, and psychological actions taken to build relationships or influence actors’ decision-making (moral and mental)” (TRADOC, 2017, p. 75). One component of this engagement capability was the demonstration on the part of leaders of “character, competence, and commitment in word and deed to the U.S. military profession and ethic to secure the support of U.S., regional partner, and global populations” (TRADOC, 2017, p. 61). What the concept paper did not discuss, however, was the development of the new leadership development programs that would be necessary to create this type of intangible engagement component at



the small-unit level. If NATO militaries do in fact respond to hybrid threats through developing these sorts of units, there will need to be a fundamental reassessment of the ordinary strategies and methods used to develop small-unit leaders. Given the ongoing debates on the current nature and well-being of U.S. Army professional military education and its need to develop more intellectual and adaptive leaders, this curriculum offers useful ways in pursuing these challenges at the unit level.

The 16th STB invested significant planning time in creating a holistic leadership development program that used different educational and training techniques to maximize its overall effectiveness. The training program demonstrated the benefits of a multifaceted training model using experiential and competency-based training in the context of preparing leaders for making decisions that may be required in complex operational environments such as those featuring hybrid threats. Through post-execution training audience analysis, the lead planners gained valuable insight into planning future events that could apply across a broad spectrum of leadership training models and into the ethical and legal implications associated with them. Given the shared moral, ethical, and legal values of NATO members, the holistic approach used by the 16th STB in leadership development could be integrated in a practical way across Alliance military formations, tailored to individual nations' military histories, organizational cultures, and training approaches and experiences (Prescott, 2017). 

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# A Relational Learning Approach to New Faculty Orientation in Professional Military Education

Megan J. Hennessey  
U.S. Army War College

## Abstract

This article explores the impetus behind and lessons learned from the redesign of the U.S. Army War College's (USAWC) 2019 New Faculty Orientation. The goal of the New Faculty Orientation is to meet new faculty's needs in a customized program by providing networking opportunities across all departments, schools, centers, and institutes in a positive and reflective environment. Foundational seminar-facilitation skills and adult-learning theories were introduced during the orientation and subsequently reinforced in a series of continuing workshops throughout the academic year. Additionally, the inaugural use of a digital and interactive new faculty handbook introduced a hybrid-learning component and provided an accessible introduction to the USAWC community before new faculty arrived at Carlisle Barracks, Pennsylvania.

The New Faculty Orientation (NFO) is often the first official introduction to the U.S. Army War College (USAWC) environment and culture for incoming faculty members. Each year, civilian and military faculty who are new to the USAWC come together in mid-July and participate in a multi-day program intended to both orient and acculturate them into the educational environment at the Army's senior service college. This orientation is designed and executed by the Office of Educational Methodology, which is managed by the director of educational methodology, a credentialed faculty member, with the assistance of an instructional systems specialist. The effects of the NFO are far-reaching, as new faculty from all the schools, centers, and institutes across the USAWC are required to attend, including faculty who teach within both the on-site and distance education programs.

## Faculty at the USAWC

When Frederick the Great established the first professional military education (PME) institution on record in 1763, the instructors were handpicked officers of the highest caliber, chosen for their professionalism and skills in warfighting (Arnold, 1993). Today, U.S. Army Training and Doctrine Command Pamphlet (TP) 525-8-2, *The U.S. Army Learning Concept for Training and Education, 2020-2040* (U.S. Department of the Army [DA], 2017), defines faculty as “leaders, mentors, teachers, instructors, facilitators, training managers, and training developers who facilitate the development of individual and collective competencies through training and education” (p. 29). This definition applies to both civilian and military USAWC faculty. Indeed, according to TP 525-8-2 (2017), it is the Army’s goal to “make faculty assignments coveted by top quality officers, warrant officers, noncommissioned officers, and civilians” (p. 18).

The faculty cadre at the USAWC in any given year is therefore an eclectic and expert mix of Joint Professional Military Education II-qualified active duty instructors with various military occupational specialties and leadership experiences (including international officers), federal civilians with experience as strategic advisors, and highly credentialed civilian academics with significant research profiles in public scholarship. Together with the highly diverse faculty profile, the personnel turnover between academic years—typically one third of the total faculty population—presents unique challenges for faculty development and new faculty orientation. Preparing faculty to engage students that retired U.S. Army Lt. Gen. Frederic J. Brown (1948) once called “bright-eyed beavers all set to solve all the world’s problems” requires far more than a one-size-fits-all approach.

## Relational Learning

With the Army learning environment concept’s emphasis on developing students’ agility, adaptivity, and innovation in competency-based training and education comes the need for enabling conditions in faculty preparation and development (DA, 2017). Schatz, Fautua, Stodd, and Reitz (2015) named five such conditions, including

**Megan J. Hennessey, PhD**, is the director of educational methodology at the United States Army War College. Previously, she held senior instructor and instructional systems designer positions at the Federal Bureau of Investigation Academy and the National Geospatial-Intelligence College. From 2010 to 2013, she was a faculty member in and acting department head of the Communication Department at the Expeditionary Warfare School, Marine Corps University. Hennessey earned her doctorate in higher education with a secondary specialization in Shakespearean andragogy from George Mason University.

the encouragement and empowerment of social learning. Put another way, PME at the senior service college level is—or should be—a relational learning environment, inclusively and inherently social with constant and dynamic thought partnership between faculty and students. Such an environment demands a different type of PME faculty member, one who relies on relationship building and, as Reed and Collins (2004) wrote, “self-synchronization over command and control” (p. 55).

This shift from transactional communication to shared dialogue in the classroom can be uncomfortable for some instructors, perhaps especially for those who have never taught adult learners before and may be less adept at managing the nuances of dynamic and unpredictable seminar dialogue. At the senior service college level, another confounding factor is the comparable demographics of military students and military instructors, with the two groups being near-peers (Stiehm, 2002). The situation of faculty from civilian academic backgrounds presents another unique opportunity for perspective taking, as, unlike their active duty instructor peers, they may not share quick bonds of camaraderie with their military students through shared warfighting experiences.

In this environment, faculty immediacy behaviors play a vital role in promoting learning transfer and fostering free and frequent emergence of ideas via seminar dialogue. Immediacy is the perception of a shared and positive physical and psychological relationship between communicators (Mehrabian, 1966). Faculty who are able to create a positive connection with students in relational learning environments cannot only improve the students’ affective engagement with their own learning experience but can also encourage students to learn more about the subject matter outside of class time (Richmond, McCroskey, & Johnson, 2003). While immediacy behaviors—both verbal and nonverbal—can be taught in faculty development programming, the foundations of instructional facilitation in an adult-learning environment must first be in place.

## **Lessons Learned from Prior Orientations**

Evaluations of past NFOs at USAWC reflected the importance of these foundations. Over multiple years, faculty reported that the most-valued presentations during orientation were sessions such as “Faculty Roles and Responsibilities” and “Facilitating a Socratic Seminar,” which both explained the role of the instructor as a facilitator of learning in an adult-learning environment. The least-valued presentations were often technology-based sessions such as “Introduction to Blackboard,” which introduced faculty to the use of the college’s learning management system. Faculty evaluated these sessions as limited in utility when compared to opportunities to learn about classroom management and effective questioning in seminar dialogue.

Often, faculty also compared the orientation to a “fire hose” experience, one in which the immediate relevance of the information over the course of three full days was tenuous. The sheer volume of information also placed significant limitations on

attendees' working memories and abilities to recall key points later in the year. Conversely, there were other topics that faculty evaluations suggested were not covered in enough detail, such as institutional expectations of faculty behavior, the International Fellows Program, and military-faculty specific information.

### New Design

For academic year 2019, the new design of the NFO took into account the aforementioned lessons learned from past orientations as well as best practices from the scholarship of teaching and learning. As Rice, Sorcinelli, and Austin (2000) explained, three consistent concerns emerge for early-career faculty or faculty who are joining academia for the first time: (1) lack of a comprehensible tenure system, (2) lack of community, and (3) lack of an integrated life. In planning for the new design, the Office of Educational Methodology used this framework to guide its assumptions about incoming faculty. These assumptions were that faculty would expect to learn about how they could develop personally and professionally while at the USAWC and the regulatory processes by which their performance and potential for reappointment would be clearly guided. The other assumptions were that incoming faculty would expect and desire inclusion into a collegial and respectful community while being granted the necessary flexibility and support to establish a healthy work-life balance.

To supplement these assumptions, the Office of Educational Methodology gathered data via a pre-NFO survey emailed to new faculty two weeks before the orientation began. The survey yielded a 47% response rate from incoming faculty and included narrative-based prompts such as "Briefly describe your experience, if any, as an educator in a classroom environment" and "What do you hope to learn, do, and/or be as a result of attending New Faculty Orientation?" One-third of the respondents indicated they had no instructor experience, while others aligned somewhere in a range of experience that included teaching in PME, international, civilian undergraduate and graduate, and vocational institutions. The majority of respondents indicated they most wanted to understand the USAWC organization, policies, and curriculum as a result of attending NFO. The results of this survey were shared with all NFO facilitators before the kickoff orientation with the goal of customizing sessions as much as possible to the attendees' skill levels, backgrounds, and interests.

Of course, planning for NFO occurred far earlier than two weeks before its start date. Considering lessons learned from past NFOs and evidence-based suggestions from the literature, the director of educational methodology followed the USAWC's model of shared governance and briefed an initial redesign of the NFO at the college's semiannual Academic Planning Conference in January 2018. Following the recommendations of Scott, Lemus, Knotts, and Oh (2016), the briefing and subsequent formal proposal approved by the provost outlined the following goals for the future NFO:

- ◆ Meet new faculty's point-of-need in as customized of a program as possible.
- ◆ Introduce faculty to and provide networking opportunities across all departments, schools, centers, and institutes.
- ◆ Foster a positive and collegial environment, including time for reflection.
- ◆ Introduce and model interactive learner-centric teaching strategies and pedagogical approaches.
- ◆ Deliver only the most critical information at the time of need, while emphasizing an ongoing culture of faculty development realized at institutional, departmental, and individual levels. (pp. 15–22)

With these goals in mind, the iteration of the 2019 NFO differed from past years in that it focused only on the most critical elements of faculty roles, responsibilities, relationships, and the fundamental facilitation skills new faculty would need to succeed in leading their first residential seminar. Each goal will be further explained in the following sections.

## Customizable

The eclectic mix of faculty backgrounds, areas of expertise, and qualifications is a strength of the USAWC but also a challenge for institution-wide faculty development such as the NFO. Active duty military instructors at the USAWC are guided by USAWC Regulation No. 600-10, *Military Faculty at the U.S. Army War College*, to provide value to the institution via “leadership, teaching of relevant topics, practitioner experience, and professional diversity” (U.S. Army War College [USAWC], 2017, p. 2) and are required by that same regulation to have completed senior-level education, have experience working at the strategic or high-operational level in joint, interagency, or multinational environments, and demonstrate refined communication skills, among other criteria. Civilian faculty are guided by USAWC Regulation No. 690-12, *Civilian Personnel Employment under Title 10, United States Code, Section 4021*, and “must adhere to standards similar to those required of faculty members at civilian institutions” (USAWC, 2016, p. 3). An earned doctorate degree is the “standard of excellence” for these positions, and “such scholars bring to the institution depth of knowledge and scholarly ability; the best of them are also outstanding teachers and colleagues” (USAWC, 2016, p. 3). With these different expectations for each faculty population, the redesign of the NFO had to encompass the needs of both military and civilian faculty and bridge the potential scholar-practitioner gap (when necessary).

To do so, the NFO focused not just on fundamentals of adult education with a one-hour introduction to “adult-learning theory and applications” led by the director of educational methodology but also on fundamentals of teaching at the USAWC specifically. To do so, an active duty military instructor and a well-respected USAWC department chair led a 90-minute session on “Faculty Roles and Responsibilities.” This

session covered information pertinent to both military and civilian faculty of all levels of expertise, experience, and academic credential. Attendees were further encouraged to ask questions and engage with practical examples and scenarios that aligned with not only their individual interests but also their departments at the USAWC. This engagement continued with a 90-minute faculty panel, where attendees could interact with and ask members from every department (within the USAWC's School of Strategic Landpower) specific questions.

The most drastic change that benefited customizability, however, was the decision to turn the NFO into a hybrid experience. Video-based and other multimedia components linked within an inaugural *New Faculty Orientation Handbook* were digitally accessible via the Blackboard learning management system and offered new faculty the opportunity to—at their convenience and dependent upon their own interest—learn more about additional topics that were traditionally covered synchronously during past NFOs. This handbook was available to faculty before they ever stepped foot on campus. Creating a hybrid NFO experience ensured asynchronous, accessible content while meeting the needs of a diverse and geographically dispersed incoming faculty cadre.

Organizational representatives throughout the USAWC were invited by the Office of Educational Methodology to contribute video recordings featuring short overviews of the USAWC mission and pertinent information for new faculty. These videos were recorded in a variety of ways, ranging from the use of the formal USAWC recording studio with audio/visual team assistance to clips from the video-based discussion tool Flipgrid. The videos were hyperlinked in the *New Faculty Orientation Handbook*, which was well-received by faculty, staff, and the Process for Accreditation of Joint Education review team, who commented in *Process for Accreditation of Joint Education: U.S. Army War College Joint Studies Program* that “the *New Faculty Orientation Handbook* has valuable content on adult learning and teaching methods that is valuable to new and veteran faculty” (Chairman of the Joint Chiefs of Staff, July 2018, p. 15). Indeed, following the Process for Accreditation of Joint Education team's advice, the handbook will be rebranded and expanded in future years to make it applicable to all faculty and not just incoming personnel.

## Networking and Collegiality

By transitioning some traditionally face-to-face sessions of the NFO to the online modality featured in the *New Faculty Orientation Handbook*, time was opened in the usually packed three-day schedule. An effort was made to protect and encourage faculty networking during these times and opportunities were also built specifically into the schedule for continental breakfast, coffee socials, lunch, and a USAWC-wide social at the Carlisle Barracks Morale, Welfare, and Recreation facility that was open to all faculty, staff, and families. Returning USAWC faculty were encouraged by the

Office of Educational Methodology to join in the NFO sessions whenever possible, and one session—“How Learning Works” with guest speaker Dr. Chad Hershock of Carnegie Mellon University—was specifically marketed toward all faculty at the US-AWC. These opportunities allowed new faculty to interact with their peers from across the entire institution rather than only their department, following Washburn’s (December 2004–February 2005) description of nonhierarchical mentoring systems that are flexible and can occur across multiple relationships and multiple times.

The cohort-driven and collegial nature of the NFO was also emphasized in its redesign, and attendees were encouraged to not only network with returning faculty and staff but also with their fellow NFO participants. In this way, the NFO became a type of team-based professional development experience, which Poyas and Smith (2007) cited as influential for faculty in sharing both like and diverse research interests. These relationships were enhanced as new faculty progressed together through a continuum of faculty development workshops throughout the remainder of the academic year.

## Model Behaviors

In their book *Coming in from the Margins: Faculty Development’s Organizational Development Role in Institutional Change*, Schroeder, Blumberg, and Chism (2010) explain the faculty developer’s evolving role as an institutional change agent. The US-AWC Office of Educational Methodology likewise influences the culture of teaching and learning at Carlisle Barracks and does so with a foundation in, as Schroeder, Blumberg, and Chism (2010) summarize, a “conceptual understanding of: philosophy of learning and teaching; teaching-learning dynamic; learning-centered teaching; learning outcomes; outcomes assessment; course assessment; course alignment; trends in higher education; and organizational change strategies” (pp. 173–174). In this way, the educational methodology team strives to model instructional strategies that exemplify the USAWC’s “mission to educate and develop leaders for service at the strategic level while advancing knowledge in the global application of landpower” (USAWC, n.d.) through innovative and experiential pedagogies.

While the director of educational methodology and the instructional systems specialist within the office led some NFO sessions, other facilitators were specifically recruited for their reputations as innovative and effective instructors, their ability to connect with the USAWC student population, and their willingness to mentor other faculty. Each facilitator was thoughtfully chosen and expected to model the professional and effective behavior that the USAWC expects of all its faculty. Specifically, facilitators were asked to ensure their sessions were as interactive as possible and were encouraged to avoid the traditional briefing or “death by PowerPoint” in favor of more experiential and discussion-based delivery. This same guidance applied to contributors of the *New Faculty Orientation Handbook*,

who were also recruited based on their positive reputation as effective educators through peer and supervisor recommendations.

### Point-of-Need

Faculty time is valuable and should be respected; the demands on faculty time are many and intense, and the faculty cadre across the entire enterprise are often involved in various teaching, scholarship, and service activities that both limit their availability for professional development and sometimes take them away from Carlisle Barracks for any period of time. Limitation on time is a known barrier to faculty development (Cafarella & Zinn, 1999). With this in mind, a relational approach to faculty development recognizes such barriers to mutual exchanges of information and ideas and actively works to effectively operate within known confines and propose actionable alternatives.

To this end, the redesign of the NFO sought to maximize participants' attendance during the three-day workshop while also scheduling additional faculty development opportunities according to the point-of-need within the academic year. Based on feedback from prior NFOs and returning faculty and administrator input, only the sessions most critical to new faculty at the beginning of the academic year were included in the NFO agenda. This decision aligned with the finding from Hennessey (2018) that new faculty—and active duty faculty in particular—are burdened by faculty development content that is either superfluous or overnuanced, which actually detracts from their ability to immediately prepare for seminar instruction. As one O-6 (colonel) instructor participant from Hennessey's study put it,

I think some of the faculty development sessions start off, the first time it's like, "Ok, we're going to talk about this subject." Haven't been here, haven't taken the course here, don't have a real big understanding of that in particular ... But in execution of those early faculty development sessions, you're talking about ninja level stuff. Super bowl level stuff. When the new instructors are down here at junior high football. (p. 119)

The goal for the Office of Educational Methodology during the first year of incoming faculty's tenure at the USAWC therefore became to ensure that new faculty had the instructional skills necessary to successfully facilitate learning within a seminar environment, irrespective of content area, and relying upon fundamental facilitation skills specifically in place at the USAWC. The NFO was only the beginning and introduced participants to faculty roles and responsibilities, adult-learning theory and applications, Socratic seminar facilitation, instructional strategies for teaching International Fellows (which make up about 20% of the resident class), and the basics of how the adult brain processes new information (or "How Learning Works").



Other workshops were scheduled in a progressive sequence according to the point-of-need aligned with the academic calendar. For example, sessions on “Feedback and Coaching in Adult Education” and “Introduction to Student Assessment and Rubrics” were scheduled before faculty graded the resident students’ first written assignments. Likewise, “Facilitating a Comprehensive Exam” was scheduled before faculty would proctor and assess students’ oral comprehensive exams in March. Meeting faculty at their point-of-need in such a way follows the best practices of instructional design and decreases cognitive load on faculty (Sweller, Van Merriënboer, & Paas, 1998).

## Summary

The Office of Educational Methodology at the USAWC redesigned the NFO to meet the institutional challenges of an annual 33% faculty turnover rate, competing and consistent demands on faculty time, and the diverse instructional backgrounds of incoming faculty. By focusing on relational learning for both faculty and students, the redesigned, hybrid NFO became a customizable and collegial opportunity for incoming faculty to connect with the USAWC community and engage with developmental programming specifically planned for faculty’s point-of-need, including ample time for self-reflection. After the academic year concludes, the Office of Educational Methodology will continue examining effects of the redesign on student-learning outcomes and faculty performance and satisfaction. ✂

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# Comparison of Occupation Physical Assessment Test Scores Administered at United States Military Academy, Reserve Officers' Training Corps and Initial Entry Training

Maj. Nicholas Ouimet, Maj. Matthew J. Lensing, Maj. Julia Carier  
Lensing, Lynn R. Fielitz, and Col. Kevin A. Bigelman

United States Military Academy

## Abstract

The ability of soldiers to perform physically demanding tasks associated with their military job requirements is a crucial component of a successful army. To ensure that soldiers can meet the physical demands of their chosen occupation, the U.S. Army, beginning in 2017, required all initial entry sources to administer the Occupational Physical Assessment Test (OPAT) to future soldiers. The OPAT assesses lower-body and upper-body power, lower-body strength, and the aerobic capacity of each soldier. Data were obtained on 6,732 participants from the United States Military Academy (USMA), the Reserve Officers' Training Corps (ROTC), and U.S. Army Initial Entry Training (IET). The results of the test, with a gender-neutral grading scale, indicated that cadets from USMA performed better on the power throw, long jump, and dead lift than ROTC and IET. ROTC cadets performed better than IET participants on the same three events. ROTC and IET participants performed better than USMA cadets on the interval run but equal to each other. Based on the performance, 92.0% of USMA cadets scored in the highest OPAT "heavy" category compared to 84.2% for ROTC cadets and 82.3% for IET participants. The results indicate that USMA cadets performed better than both ROTC and IET participants, and ROTC cadets performed better than IET participants. Several possible explanations for the differences in performances are discussed.

The ability of an individual to perform physically demanding tasks that are associated with their assigned duty is critical to success in the military (Sharp, Patton, & Vogel, 1998). As such, it is essential that military leaders develop and implement predictive models of battlefield physical performance (Teplitzky, 1991; Williams & Rayson, 2006). Since its adoption in 1980, the Army Physical Fitness Test (APFT) was the only physical assessment performed by soldiers. A semiannual three-battery assessment, the APFT serves to measure the general fitness level of a soldier but does not differentiate between different physical requirements for various military occupations (Department of the Army [DA], 2012). Research over the last 20 years has shown that the three events tested on the APFT (two minutes of push-ups, two minutes of sit-ups, and a timed two-mile run) do not effectively assess a soldier's ability to perform physically demanding tasks often associated with various military specialties (Bilzon, Allsop, & Tipton, 2001; Heinrich, Spencer, Fehl, & Poston, 2012; Jette, Kimick, & Sidney, 1989; Teplitzky, 1991). Furthermore, a national decline in youth physical activity over the last 30 years has resulted in a wide range of entry-level candidate fitness in the military (Dwyer et al., 2009).

**Maj. Nicholas Ouimet, U.S. Army**, is a student at the Command and General Staff Officer College, having previously served in the Department of Physical Education at the United States Military Academy (USMA) at West Point, New York. He is an infantry officer with previous assignments to Fort Drum, New York, and Fort Wainwright, Alaska, and has deployed in support of Operation Iraqi Freedom and Operation Enduring Freedom. He holds a BS in European history from USMA and an MEd in kinesiology from the University of Virginia.

**Maj. Matthew J. Lensing, U.S. Army**, is an infantry officer and an aquatics instructor in the Department of Physical Education at USMA. He holds a BS from USMA and an MEd in kinesiology from the University of Virginia. His previous assignments include serving in the 101st Airborne Division and the 3rd Cavalry Regiment and include three deployments to Afghanistan in support of Operation Enduring Freedom.

**Maj. Julia Carier Lensing, U.S. Army**, is an adjutant general officer and an assistant professor in the Department of Systems Engineering at USMA. She holds a BS in engineering management from USMA, an MA in human resource management from Webster University, and an MS in systems engineering from the University of Virginia. During her time in the Army, she has served as a battalion personnel officer and battalion personnel strength manager for multiple units and has deployed twice in support of Operation Enduring Freedom.

Prior to 2015, no assessments were required before enlistment to screen for a soldier's ability to meet the physical demands of his or her assigned specialty (Dwyer et al., 2009). Accordingly, to mitigate the increasing number of recruit candidates that were not physically ready to attend initial military training and to determine which recruits were best able to meet the physical demands of a specific job, a more robust group of initial assessments was sought. The U.S. Army Training and Doctrine Command (TRADOC) and the U.S. Army Research Institute of Environmental Medicine (USARIEM) worked to create a physical assessment that would enable personnel managers to direct recruits to occupations that they are best suited for based on their physical fitness. By analyzing the physical requirements of a number of military tasks, USARIEM developed the Occupational Physical Assessment Test (OPAT). The OPAT is a four-event test designed to assess an individual's strength, power, and aerobic capacity. How an individual performs on the OPAT serves as an indicator as to which occupational Army specialties he or she would be able to train for, as well as the individual's ability to successfully meet specific physical demands of those assignments.

In 2017, the U.S. Army required that all initial entry sources administer the OPAT to future soldiers (Fanning, 2016; Soika & Nowels, 2017). Currently, there are three primary organizations that administer the OPAT for individuals who decide to transition from citizens into soldiers: the United States Military Academy (USMA) at West Point, the United States Army Cadet Command Reserve Officers' Training Corps (ROTC), and U.S. Army Initial Entry Training (IET). The USMA is a four-year, government-funded institution in which citizens are placed on active duty and commissioned as officers upon graduation. The ROTC works to develop reserve and active duty officers through military instruction of students attending civilian universities. Lastly, IET comprises recruiting stations and other courses where civilians enlist to serve in the U.S. Army.

**Lynn R. Fielitz, PhD**, is a professor in the Department of Physical Education at USMA. He teaches in the undergraduate physical education program and is the associate director of instruction. Fielitz holds a BS in physical education from George Williams College, an MS in physical education from the University of Tennessee, and a PhD in sports administration from the University of New Mexico. He has numerous articles and presentations on physical education instruction, data mining, predicting athletic performance, and student perceptions of the physical education curriculum.

**Col. Kevin A. Bigelman, PhD, U.S. Army**, is the deputy director of the Department of Physical Education at USMA. He holds a BS from USMA, an MS from Indiana University, and a PhD from the University of Georgia. His assignments include multiple U.S. and foreign tours and deployment in support of Operation Enduring Freedom.

After administering the OPAT at USMA for two years, the question was posed as to how performance on the test differed among commissioning and initial entry sources. Therefore, the purpose of this study is to determine if there is a difference in performance across the four events of the OPAT between USMA, ROTC, and IET. A better understanding of group performance relative to each other may provide insight into the success of each source's physical training program, as well as assess the ability of each source to produce soldiers capable of meeting the highest physical standards of the OPAT.

### Methods

Prior to collecting data, the USMA Institutional Review Board approved the study. Data were collected from the various initial entry sources. USMA cadets were tested and the data recorded in the official academy database maintained at West Point, New York. Data from ROTC and IET soldiers were provided by TRADOC Center for Initial Military Training (CIMT), Fort Eustis, Virginia. The data were combined into an Excel spreadsheet and identified by source and gender. All other identifying characteristics were removed.

### Procedures

The OPAT is assessed on the same scale for both men and women, with the goal of performing as well as possible. Results provide measurements of upper- and lower-body power, lower-body strength, and aerobic endurance. The OPAT events are the standing long jump (lower-body power), seated power throw (upper-body power), strength dead lift (lower-body strength), and the interval aerobic run (aerobic endurance). The standing long jump, seated power throw, and strength dead lift are the first three test events and can be performed in any order. The interval aerobic run must be the last event performed. Individuals are authorized to take up to five minutes of recovery time between events but may elect to proceed sooner (DA, 2016b).

The execution of the OPAT at USMA occurs in the spring of the junior year. In accordance with published OPAT standards, cadets receive a briefing and demonstration of the OPAT and each of the four test events (DA, 2016b). Once completed, cadets are split into three groups of 20 to 30 to start one of the three events. During testing, cadets carry their OPAT scorecard (DA, 2016a) from event to event, where trained graders record their performance. Upon completion of the OPAT, cadets turn their scorecards into a designated grader who records the scores in an online database. While data storage methods may differ, execution of the OPAT itself is the same across the three sources in this study. ROTC cadets take the OPAT at their universities or assigned advanced camp, which generally occurs during the summer between their junior and senior years of

**Table 1***Occupational Physical Assessment Test Standards*

<b>OPAT categories</b>	<b>Standing long jump</b>	<b>Seated power throw</b>	<b>Strength dead lift</b>	<b>Interval aerobic run</b>
<b>Category A Black (Heavy)</b>	160 cm 5'03"	450 cm 14'09"	160 lbs	43 Shuttles 6-2
<b>Category B Gray (Significant)</b>	140 cm 4'07"	400 cm 13'01"	140 lbs	40 Shuttles 5-8
<b>Category C Gold (Moderate)</b>	120 cm 3'11"	350 cm 11'06"	120 lbs	36 Shuttles 5-4
<b>Category D White (Unqualified)</b>	Any event score below Category C Gold (Moderate) level			

\*Minimum scores in each category

Note: OPAT = Occupational Physical Assessment Test. Table by Maj. Julia Lensing.

**Table 2***Demographics for the Population of Occupational Physical Assessment Test Participants*

	<b>USMA</b>	<b>ROTC</b>	<b>IET</b>
<b>Total population</b>	1,782	4,352	598
<b>Mean age</b>	22.0 years	21.8 years	19.9 years
<b>Men</b>	1,467 (82.3%)	3,349 (77%)	444 (74.2%)
<b>Women</b>	315 (17.7%)	1,003 (23%)	154 (25.8%)

Note: OPAT = Occupational Physical Assessment Test; IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Table by Maj. Julia Lensing.

college. IET candidates take the OPAT during the recruitment phase and prior to attending initial entry training. Though initial entry recruits do not take the OPAT at the same stage in their military careers, the administration of the test is identical.

The execution of each of the four events, specified in detail in the OPAT instructions, serves to ensure that all performances are equal despite location or administration source (DA, 2016c). Instructions for each of the events follow.

**1. Standing long jump.** The standing long jump is considered a test of lower-body power but, more specifically, is an excellent indica-

tor of explosive horizontal displacement. Participants stand on a designated line and, from a two-footed takeoff, jump upward and forward as far as possible. Scores are measured by the forward distance traveled from the start line to the back of the heel closest to the start line. If participants stumble, fall forward or backward, or move after landing, their jump is not counted, and they must repeat that attempt. Three graded attempts must be completed, with the distance measured in centimeters and the best or furthest score counted.

**2. Seated power throw.** The seated power throw test is intended to measure upper-body power. Participants sit on a flat surface, with their backs against a

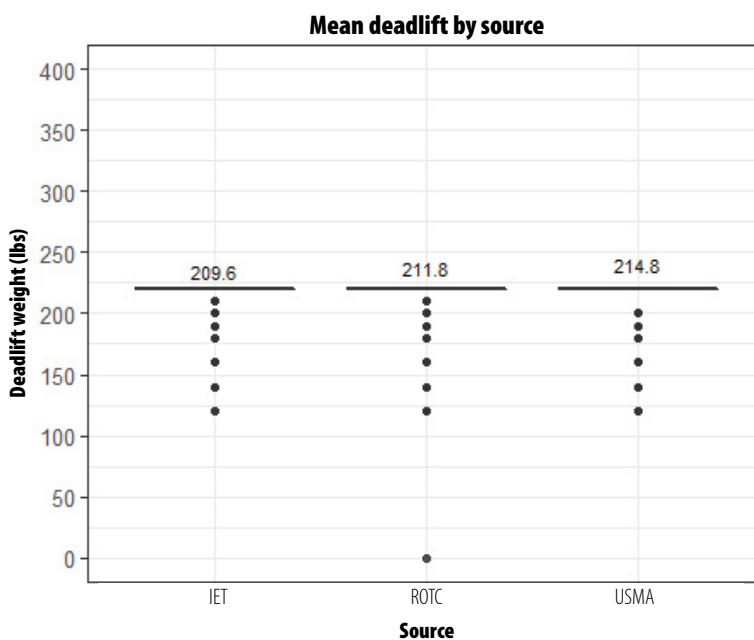
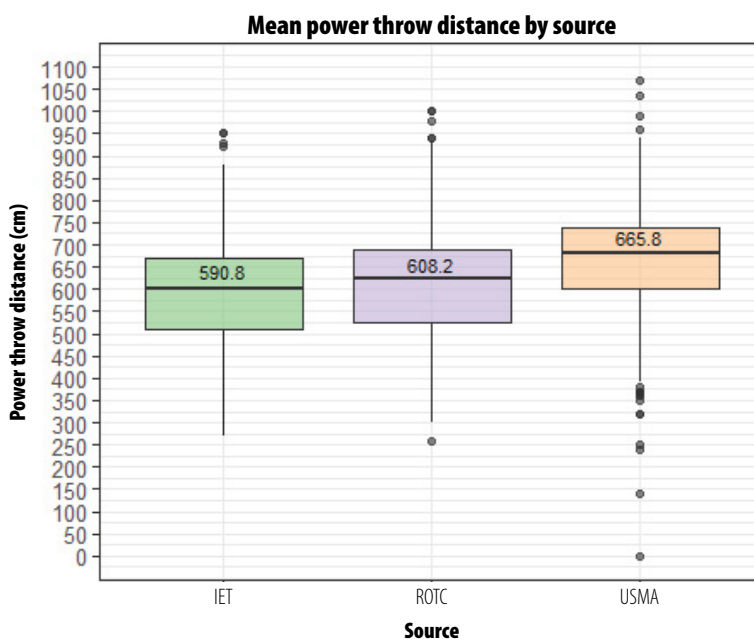
**Table 3**

*Mean and Standard Deviation of Event Scores by Commissioning Source*

Event	Source	Mean $\pm$ SD
<b>Power throw</b>	IET	590.8 $\pm$ 121.3 (cm)
	ROTC	608.2 $\pm$ 116.9 (cm)
	USMA	665.8 $\pm$ 119.2 (cm)
<b>Long jump</b>	IET	211.3 $\pm$ 32.6 (cm)
	ROTC	210.1 $\pm$ 31.8 (cm)
	USMA	221.1 $\pm$ 31.6 (cm)
<b>Dead lift</b>	IET	209.7 $\pm$ 21.7 (lbs)
	ROTC	211.8 $\pm$ 19.8 (lbs)
	USMA	214.8 $\pm$ 15.4 (lbs)
<b>Interval run</b>	IET	76.2 $\pm$ 20.8 (Shuttles)
	ROTC	78.2 $\pm$ 21.4 (Shuttles)
	USMA	74.5 $\pm$ 21.1 (Shuttles)

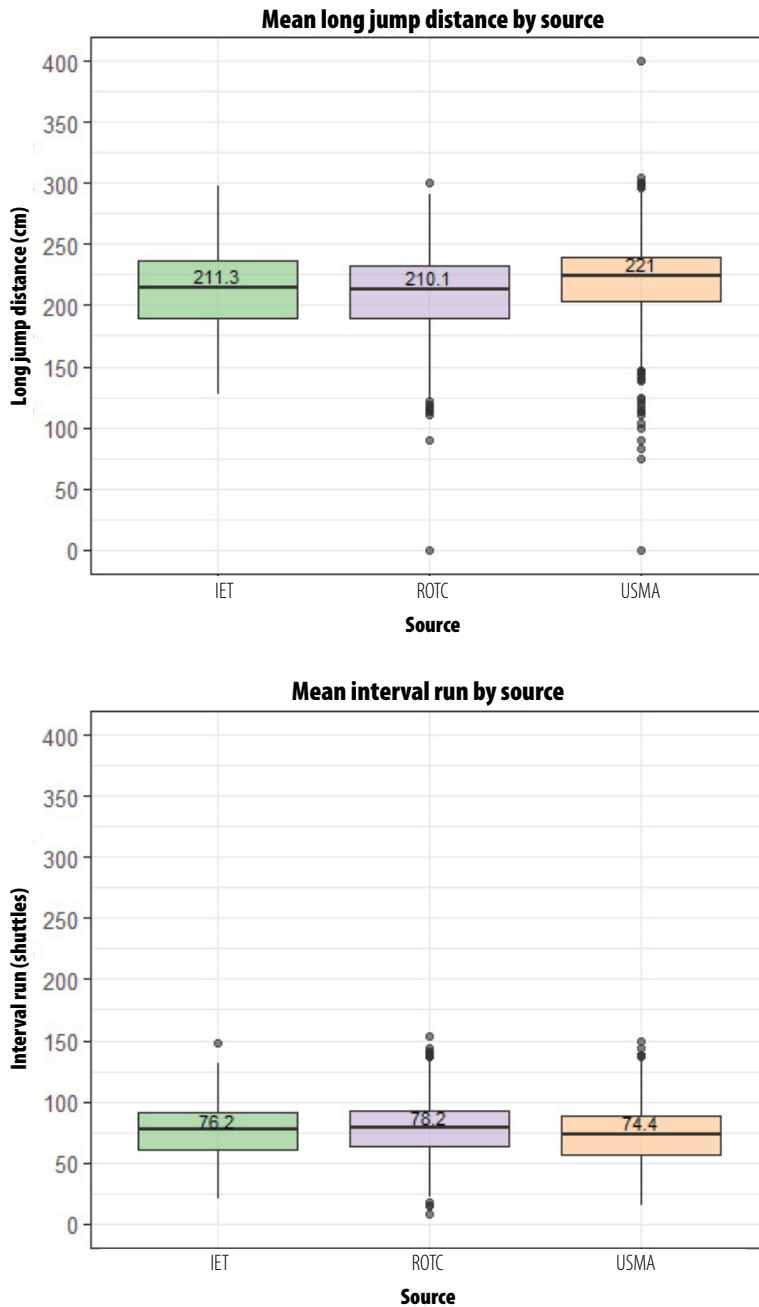
*Note:* IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Table by Maj. Julia Lensing.





*Figure 1.* Boxplots comparing combined male and female mean scores by commissioning/initial entry source, by event. *Note:* IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Figure by Maj. Julia Lensing.

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*Figure 1 (continued).* Boxplots comparing combined male and female mean scores by commissioning/initial entry source, by event. *Note:* IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Figure by Maj. Julia Lensing.

**Table 4***Comparison of Each Source's Performance on the Four Occupational Physical Assessment Test Events*

<b>Dependent variable</b>	<b>Source</b>	<b>Comparison source</b>	<b>Mean difference</b>
<b>Power throw</b>	USMA	ROTC	57.5 cm*
		IET	75.0 cm*
	ROTC	IET	17.4 cm*
<b>Long jump</b>	USMA	ROTC	10.9 cm*
		IET	9.7 cm*
	ROTC	IET	1.2 cm*
<b>Dead lift</b>	USMA	ROTC	3.0 lbs*
		IET	5.2 lbs*
	ROTC	IET	2.2 lbs
<b>Interval run</b>	USMA	ROTC	3.7 shuttles*
		IET	1.7 shuttles
	ROTC	IET	2.0 shuttles

*Note:* OPAT = Occupational Physical Assessment Test; IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Table by Maj. Julia Lensing.

\*  $p \leq .05$

wall. The performer executes a forward throw similar to a chest pass and attempts to throw a 2 kg medicine ball as far as possible. During the execution of the seated power throw, the thrower's back must always remain in contact with the wall to ensure that the event is measuring upper-body power and not influenced by the lower body. To ensure consistent standards across all participants, a judge sits to the side of the participant and invalidates throws where standards are not maintained. Like the standing long jump, participants will be tasked to repeat improp-

**Table 5***Comparison of the Event Scores of Only Females from Each Commissioning/Initial Entry Source*

Dependent variable	Source	Comparison source	Mean difference
<b>Throw</b>	USMA	ROTC	43.7 cm*
		IET	53.8 cm*
	ROTC	IET	10.1 cm
<b>Long jump</b>	USMA	ROTC	11.1 cm*
		IET	10.7 cm*
	ROTC	IET	-0.3 cm
<b>Dead lift</b>	USMA	ROTC	6.1 lbs*
		IET	9.8 lbs*
	ROTC	IET	3.7 lbs
<b>Interval run</b>	USMA	ROTC	3.6 shuttles*
		IET	4.1 shuttles*
	ROTC	IET	0.5 shuttles

*Note:* IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Table by Maj. Julia Lensing.

\*  $p \leq .05$

er throws. Each participant must complete three graded throws, with distance calculated to the nearest 10 cm. The best of the three graded scores is used for determination of event performance.

**3. Strength dead lift.** The strength dead lift utilizes a hexagonal bar with increasingly heavier weights. The test measures lower-body strength. Participants are required to perform an initial "check dead lift," where judges check for proper lifting form and make corrections. Once the judge is satisfied with the performer's ability to perform a proper and safe lift, he or she is allowed to

**Table 6***Comparison of the Event Scores of Males from Each Commissioning/Initial Entry Source*

<b>Dependent variable</b>	<b>Source</b>	<b>Comparison source</b>	<b>Mean difference</b>
<b>Throw</b>	USMA	ROTC	46.8 cm*
		IET	59.0 cm*
	ROTC	IET	12.2 cm*
<b>Long jump</b>	USMA	ROTC	7.6 cm*
		IET	4.3 cm*
	ROTC	IET	-3.3 cm*
<b>Dead lift</b>	USMA	ROTC	0.2 lbs.
		IET	0.5 lbs.
	ROTC	IET	3.7 lbs.
<b>Interval run</b>	USMA	ROTC	7.2 shuttles*
		IET	5.8 shuttles*
	ROTC	IET	1.5 shuttles

Note: IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Table by Maj. Julia Lensing.

\*  $p \leq .05$

proceed to the first of eight graded lifts. The total weight on each bar is 120, 140, 160, 180, 190, 200, 210, and 220 pounds, respectively. Participants must start at the first bar and, on the command "lift," successfully perform a proper dead lift. Once complete, the participant is afforded up to one minute of rest between each weight. The final score is the last successfully lifted weight. If the performer is unable to lift a weight successfully or demonstrates poor lifting form, he or she is allowed one additional lift.

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**Table 7**

*Percentage of Participants Who Placed in Each Category on the Occupational Physical Assessment Test. Numbers in Parentheses Indicate the Percentage of the Total Population to Score in a Category of Above*

	USMA		ROTC		IET	
Category	N	% of population	N	% of population	N	% of population
<b>Category A (Black)</b>	1639	92.0%	3664	84.2%	492	82.3%
<b>Category B (Gray)</b>	88	4.9% (96.9%)	367	8.5% (92.7%)	48	8.0% (90.3%)
<b>Category C (Gold)</b>	26	1.5% (98.4%)	193	4.4% (97.0%)	34	5.7% (96.0%)
<b>Category D (White)</b>	29	1.6% (100.0%)	128	2.9% (100.0%)	24	4.0% (100.0%)

*Note:* OPAT = Occupational Physical Assessment Test; IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Table by Maj. Julia Lensing.

**4. Interval aerobic run.** The interval aerobic run is a 20-m progressive shuttle run or “beep test.” This test is designed to measure the aerobic capacity of the participant. The test is performed by starting on a designated line and running to another line 20 m away. Loud “beeps” signal when the runner can start moving to the far line and when he or she needs to reach the far line. Speed intensifies each level as the time allocated to run between lines decreases. Judges stand on each side of the line and signal when a participant fails to make it to the line within the allocated time. Runners are afforded up to two faults, or “misses,” to be able to make up the distance and get back on track. If they receive three consecutive faults, the participants are stopped and the last successfully completed level/shuttle is denoted as their score.

When the OPAT is completed, and participants' scores are entered, their best scores are calculated and assigned to different levels in accordance with one of the four OPAT categories:

- ◆ Category A (Black): Able to perform heavy physical demand tasks
- ◆ Category B (Gray): Able to perform significant physical demand tasks
- ◆ Category C (Gold): Able to perform moderate physical demand tasks
- ◆ Category D (White): Unqualified

To score in a particular category, the candidate must score in that category across all four events. A candidate's lowest score on a single event is his or her overall categorical label (see Table 1, page 110).

## Participants

Data were obtained from 6,732 participants across USMA, ROTC, and IET. The average age of participants was 21.0 years. Women comprised 21.9% of the total population (1,472), with men comprising 78.1% (5,260) of the population (see Table 2, page 110).

## Data Analysis

Data obtained included testing source, gender, age, APFT, score on each OPAT event, overall OPAT category, and, in the case of USMA cadets, graduating class year. Data were analyzed for initial outliers, and those identified data entry faults were removed. SPSS statistics software was used to conduct a one-way ANOVA to compare different populations. Statistical significance was set at  $p \leq .05$ .

To answer the initial research question of how performance on the OPAT compared amid USMA, ROTC, and IET, the following populations were compared:

1. Combined (all data points) performance on each of the four OPAT events.
2. Performance on each event based on gender.
3. Combined (all data points) categorical performance on the OPAT.

## Results

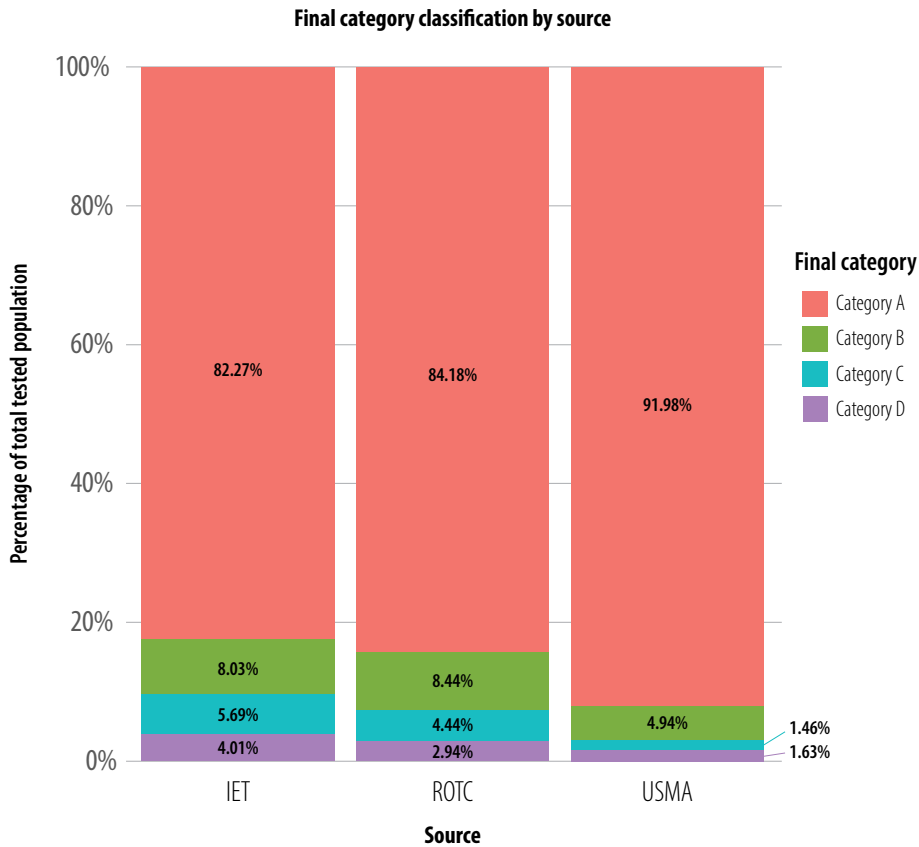
The mean and standard deviations for the combined male and female scores of each commissioning/initial entry source, by event, are shown in Table 3 (on page 111). Visual representation of the data is displayed in Figure 1 (on page 112–113).

Table 4 (on page 114) compares the mean scores for each event by the commissioning/initial entry source.

Tables 5 (on page 115) and 6 (on page 116) compares the mean scores for each event by gender and by commissioning/initial entry source.

Table 7 (on page 117) indicates the percentage of each commissioning/initial entry source that achieved each category of performance.

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*Figure 2.* Final category by commissioning/initial entry source with percentage of participants who placed in each category on the Occupational Physical Assessment Test. *Note:* IET = Initial Entry Training; USMA = United States Military Academy; ROTC = Reserve Officers' Training Corps. Figure by Maj. Julia Lensing.

Figure 2 is a visual representation of the percentage of participants who placed in each category by commissioning/initial entry source.

## Discussion

The results provide several interesting findings. Examining the combined scores, the participants at USMA performed statistically better than ROTC and IET participants in the standing long jump, seated power throw, and the strength dead lift. ROTC cadets performed statistically better than USMA cadets on the interval aerobic run but equivalent to IET participants.



A possible explanation for lower performance of USMA cadets on the interval aerobic run was that the scoring standards to achieve the Category A classification were known prior to the event. Many USMA cadets, knowing they achieved a Category A classification, may have terminated the event through their own volition rather than continuing until unable to maintain the prescribed pace. With ROTC and IET, the scores were not known, and candidates were simply told to perform their best. This point is supported with the percentage of participants who placed in Category A. Overall, 92.0% of USMA cadets placed in Category A, compared to 84.2% of ROTC cadets and 82.3% of IET participants.

An additional explanation for performance on the interval aerobic run could be that ROTC cadets conduct more unit physical training on a weekly basis. ROTC units typically have mandatory physical training three to five times per week.

Another factor that may have impacted interval aerobic run performance might have been the influence of peers. The interval aerobic run was the final event and conducted as a large group in front of peers. Peer influence could have improved or hindered performance. Participants who wanted to impress peers might have been influenced to perform better, while others might have attempted to complete the test as soon as possible.


When performance was separated by gender, female USMA cadets performed statistically better than ROTC cadets and IET participants in all four components of the OPAT. There was no statistical difference between the female performance of ROTC cadets and IET participants.

There are a number of possible reasons for the difference in performance between female USMA cadets and candidates of other sources. First, female USMA cadets make up a smaller percent of the overall population (USMA [17.7%] compared to ROTC [23.0%] and IET [25.8%]). Additionally, the percent of female USMA cadets who are members of Division I intercollegiate athletic teams is significantly higher, leading to the possibility that females at USMA have more experience, not only conducting physical training but also specifically training for strength and power activities. During mandatory physical education coursework, USMA cadets are also exposed to events such as leg squats that could improve performance on the OPAT.

On a similar note, male participants at USMA performed statistically better than those in the ROTC and IET on the standing long jump and the seated power throw events. Male ROTC cadets performed statistically better than IET male participants on the same two events. ROTC cadets conduct mandatory physical training as part of their college experience, which could possibly explain their performance on these events. For males, there was no statistical difference between any of the commissioning/initial entry sources on the strength dead lift. On the interval aerobic run, there was no statistical difference between ROTC and IET males but both performed statistically better than USMA cadets. Possible explanations for the performance on the interval aerobic run were discussed in a previous paragraph.

In comparing combined overall categorical performance by source, USMA outperformed ROTC and IET with respect to scoring in the highest physical demand category (92.0% compared to 84.2% [ROTC] and 82.3% [IET], see Table 7, page 117). When performance in either of the top two categories (Category A or Category B) is considered, USMA (96.9%) outperformed ROTC (92.7%) and IET (90.3%). The results of this study indicated that a higher percentage of USMA cadets were able to meet the higher physical demands tested on the OPAT compared to that of either ROTC or IET participants. Ultimately, the OPAT performance demonstrated that USMA cadets were able to meet the physical demands of all branches at a greater rate than other commissioning/initial entry sources.

### Conclusions

The current data from the OPAT may indicate that USMA cadets are better prepared to meet the most rigorous physical demands of Army occupations. USMA experience delivers cadets an intense and rigorous physical education curriculum, in addition to multiple evaluations of various physical assessments, prior to assessing on the OPAT. ROTC cadets, who also endure varying degrees of physical and military fitness training prior to taking the OPAT during their junior year, outperformed IET candidates who are typically recent high school graduates and, compared to USMA and ROTC cadets, may have less physical training experience. Future research should examine the long-term impact of the OPAT and its ability to correctly identify the right soldier for the appropriate military occupational specialty. 

*The authors would like to thank Dr. Whitfield East, TRADOC Center for Initial Military Training, for his review of the work prior to publication.*

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## Call for Papers


The *Journal of Military Learning (JML)* is a peer-reviewed semiannual publication that supports efforts to improve education and training for the U.S. Army and the overall Profession of Arms.

We continuously accept manuscripts for subsequent editions with editorial board evaluations held in April and October. The *JML* invites practitioners, researchers, academics, and military professionals to submit manuscripts that address the issues and challenges of adult education and training, such as education technology, adult learning models and theory, distance learning, training development, and other subjects relevant to the field. Submissions related to competency-based learning will be given special consideration.

Submissions should be between 3,500 and 5,000 words and supported by research, evident through the citation of sources. Scholarship must conform to

commonly accepted research standards such as described in *The Publication Manual of the American Psychological Association*, 7th edition.

Do you have a “best practice” to share on how to optimize learning outcomes for military learners? Please submit a one- to two-page summary of the practice to share with the military learning enterprise. Book reviews of published relevant works are also encouraged. Reviews should be between 500 to 800 words and provide a concise evaluation of the book.

Manuscripts should be submitted to [usarmyleavenworth.tradoc.mbx.journal-of-military-learning@mail.mil](mailto:usarmyleavenworth.tradoc.mbx.journal-of-military-learning@mail.mil) by 1 April and 1 October for the October and April editions respectively. See [page 133](#) for detailed author submission guidelines. For additional information call 913-684-9331 or send an email to the address above. 

# Guts, Glory, and Doctrine

## Films as an Educational Tool for the U.S. Army

Angela M. Riotto  
Army University Press

### Abstract

This article provides an introduction to the Army University Press (AUP) Films team. The AUP Films team uses historical vignettes to teach current U.S. Army doctrine, developing historically accurate documentary films as educational tools for the U.S. Army Combined Arms Center, the U.S. Army Training and Doctrine Command, and the U.S. Army at large. This article discusses the origin of the AUP Films team, its mission, and its current offerings, while also examining the benefits and challenges of teaching with film. Professional military education aims to educate soldiers in current doctrine, as well as provide lessons in leadership, tactical, operational, and strategic concepts. Film is a useful educational tool to explore each of these areas.

Until recently, film has not been largely accepted as an educational tool for adult learning. When properly assigned, however, film can serve as a powerful tool in developing critical and creative thinking skills; introducing new topics, ideas, and themes; and increasing students' awareness of differing perspectives. Film can be employed independently as a source or paired with other educational materials by level of instruction. As Ender (2019) examines in "Charlie Don't Surf: The Military, War, Film, and Teaching," film can work well to convey human issues to students, especially human interactions and relationships, by taking these complex experiences and condensing them for the viewer. Film also is a useful tool to include in a multimedia learning environment. When films were incorporated into A724: Organizational Leadership Case Studies (elective) at the U.S. Army Command and General Staff College, students found the course more engaging and thought provoking. Pairing film with readings, PowerPoint presentations, and writing assignments allows students to reach their highest learning potential from multiple learning styles (Bradbeer & Porter, 2017).

Recognizing film's usefulness as an educational tool and for its malleability and applicability, the Combined Arms Center (CAC), in conjunction with the U.S. Army Training and Doctrine Command (TRADOC), established Army University Press (AUP) Films at Fort Leavenworth, Kansas. The AUP Films team is dedicated to pro-

ducing doctrine-focused and historically accurate documentaries for use in professional military education (PME) and leader development.

## The Films Team

Created by CAC in September 2018, the AUP Films team works closely with the Combined Arms Doctrine Directorate to produce documentary films that integrate and explain current Army doctrine to educate U.S. Army soldiers. In recent years, CAC has directed the revision of several of its key Army doctrine publications (ADPs) and field manuals (FMs) to better align with large-scale combat operations and multi-domain operations. Accordingly, the AUP Films team creates documentaries that support this new doctrinal emphasis and disseminate concepts from FM 3-0, *Operations*.

Composed of nine members—four Department of the Army civilian historians, two contractor historians, and three contractor audiovisual specialists—the AUP Films team is expected to produce a collection of readily available documentary films, ensuring all lessons integrate current doctrine with historical vignettes. The films are available on the AUP's official website, social media sites (Facebook, Twitter, LinkedIn), and on its YouTube and DVIDS pages (see <https://www.armyupress.army.mil/Educational-Services/Documentaries/>). The films are free to viewers for streaming and download, and on DVDs by request.

## Teaching with Film

CAC had several reasons for creating the AUP Films team. Today's students have more experience with visual media and technology in and out of the classroom than previous generations (Trent, 2019). For example, at the Command and General Staff College and the School of Advanced Military Studies, the classrooms are equipped with smartboards, computers at each sitting station, projectors, and other technology. Many of the soldiers attending these schools have never known life without a computer. When developing courses, instructors should consider the use of technology and media, both in and out of the classroom. Films, like those available from the AUP Films team, can be accessed on in-classroom computers, at-home computers, or on the go from tablets or smartphones. Film expands the learning environment and provides opportunities for digitally fluent students to learn beyond lecture or text. There is nothing

**Angela M. Riotto, PhD**, is a historian with the Army University Press Films team, Fort Leavenworth, Kansas. She received her PhD from the Department of History at the University of Akron in May 2018.

wrong with traditional brick-and-mortar classroom experiences; however, film is an additional instructional tool that can be used to augment and enhance PME.

In 2011, TRADOC published TRADOC Pamphlet 525-8-2, *The U.S. Army Learning Concept for 2015*, to describe and develop a learning model for the all-volunteer Army and, specifically, the 21st-century soldier (U.S. Department of the Army [DA], 2011). TRADOC strives to provide an educational model to challenge and inspire learners who grew up in the digital world and are adept at using technology, while also meeting the needs of seasoned Army professionals (DA, 2011). Although the document did not expressly name film as a learning tool, its emphasis on technology through which to teach teamwork, collaboration, critical thinking, problem solving, and other leadership skills dovetails with the benefits of film.

Another reason film is an excellent addition to an instructor's teaching toolbox is students seldom need to be coaxed into watching films. In some adult research theory, many students would rather watch a film than read a textbook or monograph. Not only are films generally more entertaining, or at least more engaging and emotion provoking, but they are also more accessible (Suid, 2002). Digitally available films provide the student with a lightweight, easily accessible medium through which to learn. Students do not have to purchase a book, carry that book to and from the classroom, or spend hours reading. Films, especially those provided by AUP Films, are available to be streamed online or downloaded and can be accessed by computer or mobile devices. The documentaries produced by AUP range in length from 45 to 60 minutes. A student could easily watch one of these feature-length films in less time than it takes to read a book or even a lengthy book chapter. The sections of the films are organized by topic or doctrinal focus that allow the viewer or instructor to pause the film without disrupting its overall flow. This provides instructors time to review the previous section, propose questions for the next section, or assign the film by section. Beginning in 2020, the AUP Films team will create shorter films (5-15 minutes) that, like the sections in the feature-length films, will facilitate discussion and provide additional focus on specific doctrinal concepts or historical events.

Students who learn visually will be the greatest beneficiaries from these films. Visual learning is one of the different learning styles popularized by Neil D. Fleming in his VARK model of learning—the model also includes kinesthetic, reading, and auditory learning. While most people learn to varying degrees across these four learning modalities, those who learn best in the visual learning style are people who need to see information to learn it (Fleming & Baume, 2006). Films allow the instructor to communicate with these visual learners more effectively. For instance, in the AUP-produced film *Stalingrad: The Grain Elevator*, to convey the incredibly high casualty rate during the fight for the city, red dots consume the screen (Army University Press [AUP], 2019a). Each dot represents one casualty, and the screen, and thus the viewer, is overwhelmed with red dots. This method, when paired with auditory expression of casualty rates, conveys the devastation of war with greater effect than text or voice alone.

The introduction of film into a course creates an intellectually stimulating as well as emotionally provoking learning experience. Film can serve as a concrete learning experience in and out of the classroom. David Kolb's Learning Style Inventory supports this approach to teaching (Kolb, 1984). Kolb's experiential learning theory works on two levels: a four-stage cycle of learning and four separate learning styles. Effective learning occurs when a student progresses through a cycle of four stages: having a concrete experience, reflecting on that experience, forming abstract concepts and conclusions, and testing hypotheses in future situations. How a student resolves the tensions between conceptualization and experience and between action and reflection determines the student's dominant learning style: convergent, divergent, assimilative, or accommodative (Kolb, 1984). The introduction of film as an experiential assignment, then, provides instructors with an entertaining and useful tool to help students develop critical thinking and analytical skills (Sprau & Keig, 2001).

By incorporating films into more PME courses, TRADOC will reach more students and more effectively convey complicated information to a wider audience, many of whom are more visual and experiential learners. When paired with recommended readings and assignments, instructors can cover complex and complicated topics through multiple modalities to ensure every student has the best opportunity to gain a more thorough understanding of the material. Having students watch a film in addition to reading is a form of dual coding, which Clark and Paivio (1991) have proven as a key learning strategy to enhance students' understanding of a subject matter. The dual-coding theory postulates that the human mind processes visual and verbal information differently and, along distinct channels, creates separate cognitive representations for information processed in each channel. The mental codes for these representations organize new information and recall stored information. According to dual-coding theory, students learn best when they combine two encoding systems—text and visual (Rupley, Paige, Rasinski, & Slough, 2015). Film, then, when paired with text, serve as the visual tool that enhances students' learning and facilitate understanding of complex concepts beyond that of the assigned readings.

To assist instructors and students in their learning objectives, the AUP Films team also provides a list of recommended additional readings for each film for students and instructors desiring a deeper understanding of the information presented in the documentary. Assigning these additional texts alongside the film and doctrine manuals enables the students to comprehend the doctrinal concepts emphasized in the film more fully.


## **Challenges of Teaching with Film**

Although films can provide insight into many current doctrinal concepts, films are limited in time and space. For instance, a 70-minute feature film is produced from approximately a 35-page script. If doctrine excerpts average one every two pages, that is an average of 17 doctrine excerpts per film. Even if all from one manual, such as FM

3-0, the film would not fully describe current Army operations. This limitation requires instructors and students to engage with the doctrine and the history for a more complete understanding of the concepts and information presented in the film. AUP's *Korea: Twin Tunnels*, for example, explores the qualities of strong leaders through the case study of Col. Paul Freeman (AUP, 2019b). During one part, the film highlights "leaders at every echelon are expected to display the initiative necessary to assume prudent risk" (DA, 2017, p. 1-19). Although not a groundbreaking concept, this excerpt can serve as a discussion catalyst for leadership, initiative, and risk. The instructor could also pair this film with FM 3-0 or ADP 6-22, *Army Leadership*, for a more detailed discussion of current Army doctrine.

Another challenge with film as an educational tool is the availability of primary sources and other materials. To engage and educate the target audience, the AUP Films team strives to use historically accurate film footage and photographs. Locating and obtaining these materials can be difficult depending on the film's focus. For instance, many materials pertaining to Operation Iraqi Freedom are owned by private news companies or remain classified. As such, the team was forced to rely heavily on materials collected by veterans of the conflict and other publicly available materials. Not only does this paucity of visual media materials limit the themes and topics that can be covered in a film, it also limits the sources available to the instructor.

## Conclusion

In spite of its limitations, film is, and will continue to be, a useful educational tool for the U.S. Army. Films are accessible, adaptive to multiple learning environments, entertaining, and suitable to visual learners and the 21st-century soldier. By introducing this multimedia tool into PME, instructors can explore multiple topics, themes, and doctrinal concepts. The films produced by the AUP Films team enhance soldiers' understanding of current U.S. Army doctrine and serve as innovative educational tools to be used in and out of the classroom. 

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# Graduate Record Examinations to Be Administered at the Captains Career Course

From the Editor

The Army Talent Management Task Force was created to integrate and synchronize Army efforts to acquire, develop, employ, and retain a high-quality force that can fight and win on the battlefield against any adversary in the world. On 11 October 2018, the secretary of the Army directed the task force to implement the Junior Captain Talent Assessment at the Captains Career Courses (CCCs). The assessment is comprised of the Graduate Record Examinations (GRE) and other assessments. The GRE will be used as a predictive assessment to identify and invest in officers with high potential to succeed in competitive higher-education programs.

Administering the GRE is the first step in establishing a robust culture of assessments across the Army to gather more information about the talent of our officer corps and ensure we are making the best investment decisions for future readiness. The Army will initially use the results of the GRE to make more-informed decisions with regards to Army competitive education programs. Eventually, it will become part of the Command and General Staff Officer Course application process. The GRE will also be used to assist in developing a new talent management system, guide future assignments, inform possible broadening opportunities, focus self-development, and research talent dimensions of the Army officer corps.

The Army University, on behalf of the Combined Arms Center, will implement the GRE for CCC students beginning in 3rd Quarter, Fiscal Year 19. Students will take the GRE a minimum of one month into their respective CCC curriculum after completing the core courses. In conjunction with CCCs, The Army University will coordinate testing times for all CCC students with the GRE provider, Educational Testing Services (ETS). The GRE will be free to students; the Army G1 is funding the tests, and CCCs will issue students vouchers for use on the day of testing. An individual's GRE scores will be put in his or her official military personnel file and treated like college transcripts. Captains will be responsible for their own GRE preparation, and the GRE scores will not be used to determine promotions. ETS will distribute four copies of the results at no cost to the soldier—one to the Army Research Institute for research purposes, one to Human Resources Command for posting on an individual's officer record brief, and two copies to the academic institution of an officer's choice.

As the Army transitions from an industrial-age personnel system to an information-age personnel system, accumulating better data on its people is the key to success and assessments. Better information not only allows the Army to make better decisions about its people, it also helps individuals better understand their strengths and weaknesses to make better decisions about their future. More knowledge of our officers leads to better decisions about how we acquire, develop, employ, and retain the right talent for the future. 

# Midgrade Learning Continuum Leaders Workshop Summary

William D. Kuchinski

The Army University

The Midgrade Learning Continuum (MLC) Team invited Captains Career Course (CCC) leaders to participate in a three-day workshop in April 2019 at Fort Leavenworth, Kansas. The purpose of the train-the-trainer workshop was to empower course leaders to address concerns, share ideas, and return to their schools with techniques and procedures that would help improve course execution. This year, the MLC Leaders Workshop focused on providing course leaders with an update on course design, a review of pending doctrinal changes to the core curriculum, a practicum on effective student-centered teaching methods, and a forum to discuss leadership challenges and share effective course leadership techniques.


Three significant redesign efforts were essential points of discussion during the workshop. The first was the rapid rebalancing of 80 hours (approximately two weeks) of the common core curriculum to provide more time for branch-specific lessons. CCC leaders and the MLC Team discussed the impacts of rapidly shifting 80 hours of common core curricula to provide more time for schools to focus on branch-specific outcomes. The workshop also provided the opportunity for course leaders to provide feedback on the revised approach, discuss lessons learned, and recommend improvements to the doctrinally focused course design. The feedback will help improve the course design for the next fiscal year (FY).

The MLC Team also highlighted how the revised course design resulted in the integration of topics into doctrinal lessons where appropriate. Examples included how stand-alone lessons on the Army's Sexual Harassment/Assault and Response Program (SHARP) integrated into Army leadership lessons; the Denied, Degraded, and Disrupted Space Operating Environment (D3SOE) integrated into Army operations lessons; and the Command Maintenance Discipline Program (CMDP) integrated into Army sustainment lessons. Changing from a stand-alone, nonintegrated approach to an integrated design provided multiple opportunities for students and instructors to discuss SHARP, D3SOE, and CMDP issues in the context of doctrinal issues in the leadership, mission command, operations, planning, and training modules. The integrated approach also provided more opportunities for group discussion, student application, and instructor assessment of the concepts in the context of current Army doctrine.

Throughout the workshop, MLC Team instructors also modeled effective learner-centered and collaborative facilitation techniques. MLC Team instructors provided in-the-classroom examples of teaching techniques designed to enhance student par-

ticipation in the learning process. Some of the specific techniques demonstrated and discussed during the workshop included KWL (Know, Want to Know, and Learned), crowdsourcing, jigsaw, shift and share, and think-pair-share (Barkley, Cross, & Major, 2005; Wlodkowski, 2008). The workshop provided the course leaders with unique opportunities to observe and experience the techniques first-hand as “students” and discuss how they might use the teaching techniques back at their respective schools.

The regular turnover of military personnel teaching at the CCCs frequently results in changes in course leadership. For many CCC course leaders, this was their first experience leading in an academic environment. The workshop provided an opportunity for participants to share effective course leadership and management issues as well as to discuss effective techniques to enhance the execution of their respective courses. This year the workshop included discussions on using effective instructor calibration techniques, maintaining rigor in the classroom, implementing effective assessment policies, and developing meaningful program evaluation techniques.

The MLC Team will host the next workshop in April 2020. The goal of the workshop will be again to empower course leaders and enhance course execution. This workshop will focus on academic leadership and effective CCC course management techniques. The workshop will also include discussions on special topics of interest for FY 2021, including implementing the Graduate Record Exam, execution of the Career Course Cognitive Assessment Battery, the use of doctrinal pretests and posttests, integration of Army University Press’s virtual staff rides, and the use of automated program evaluation tools. The collaborative discussions and relationships established during the workshop will increase our shared understanding of course leadership challenges, enable the development of potential solutions, and empower CCC course leaders to execute their respective CCCs. 

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# Upcoming Conferences of Note

## **October 8–11, 2019: American Association for Adult and Continuing Education**

Hyatt Regency St. Louis at the Arch · St. Louis, Missouri

<http://www.aaace.org/>

This is the annual conference of one of the nation's largest organizations for adult and continuing education. The American Association for Adult and Continuing Education (AAACE) is the publisher of three leading adult education journals: *Adult Education Quarterly*, *Adult Learning*, and the *Journal of Transformative Education*. The theme for this year's conference is "Adult Education for Human Rights, Economic Empowerment, and Environmental Sustainability."

## **October 14–16, 2019: Association of the United States Army 2019 Annual Meeting and Exposition**

Walter E. Washington Convention Center · Washington, D.C.

<http://ausameetings.org/2019annualmeeting/>

The Association of the United States Army (AUSA) Annual Meeting and Exposition is the largest landpower exposition and professional development forum in North America. The annual meeting is designed to deliver the Army's message by highlighting the capabilities of Army organizations and presenting a wide range of industry products and services. AUSA accomplishes this task throughout the entire event by providing informative and relevant presentations on the state of the Army, panel discussions and seminars on pertinent military and national security subjects, and a variety of valuable networking events available to all that attend.

## **November 13–14, 2019: The University of North Georgia's Institute for Leadership and Strategic Studies—Symposium on "Soldier-Leaders in the Age of AI: The Future of Pre-Commissioning Education"**

University of North Georgia, Dahlonega Campus · Dahlonega, Georgia

<https://ung.edu/institute-leadership-strategic-studies/2019-symposium/index.php>

The annual conference from the University of North Georgia and the Institute for Leadership and Strategic Studies will discuss the theme of "adaptive, agile leaders" in connection with technology and artificial intelligence. The symposium will explore how advances in science and technology will shape the future battlefield operating environment; how they will contribute to the physical, cognitive, and emotional development of the soldier-leader; and the impact of future initiatives on adaptive leadership alongside ethical decision-making.

## **June 4–7, 2020: Adult Education Research Conference and The Canadian Association for the Study of Adult Education—"Adult Education in Global Times: An International Research Conference"**

University of British Columbia · Vancouver, British Columbia, Canada

<http://newprairiepress.org/aerc> and <https://edst.educ.ubc.ca/aegt2020/>

This unique multi-organizational research conference provides a forum for adult-education researchers to share their experiences and the results of their studies with students, other researchers, and practitioners from around the world. It is cosponsored by the Adult Education Research Conference (AERC), Adult Learning Australia (ALA), American Association for Adult and Continuing Education (AAACE), Canadian Association for the Study of Adult Education (CASAE), European Society for Research in the Education of Adults (ESREA), Indian Adult Education Association (IAEA), International Society for Comparative Adult Education (ISCAE), and Standing Conference on University Teaching and Research in the Education of Adults (SCUTREA).

# Author Submission Guidelines

Manuscripts should contain between 3,500 to 5,000 words in the body text. Submissions should be in Microsoft Word, double-spaced in Courier New, 12-point font.

Manuscripts will use editorial style outlined in *The Publication Manual of the American Psychological Association*, seventh edition. References must be manually typed. (The automatically generated references employed by Microsoft Word have proven to be extremely problematic during conversion into final layout format for publication, causing delays and additional rekeying of material.) Manuscripts that arrive with automated references will be returned to the authors for compliance with submission requirements. Bibliographies will not be used and should not be submitted with manuscripts.

Submissions must include a one-paragraph abstract and a biography not to exceed 175 words in length for each author. Such biographies might include significant positions or assignments, notes on civilian and military education together with degrees attained, and brief allusions to other qualifications that establish the bona fides of the author with regard to the subject discussed in the article. Do not submit manuscripts that have been published elsewhere or are under consideration for publication elsewhere.

Authors are encouraged to supply relevant artwork with their work (e.g., maps, charts, tables, and figures that support the major points of the manuscript. Illustrations may be submitted in the following

formats: PowerPoint, Adobe Illustrator, SVG, EPS, PDF, PNG, JPEG, or TIFF. The author must specify the origin of any supporting material to be used and must obtain and submit with the article permission in writing authorizing use of copyrighted material. Provide a legend explaining all acronyms and abbreviations used in supplied artwork.

Photo imagery is discouraged but will be considered if it is germane to the article. Authors wanting to submit original photographs need to do so in JPEG format with a resolution of 300 DPI or higher. Each submitted photo must be accompanied by a caption identifying the date it was taken, the location, any unit or personnel in the photo, a description of the action, and a photo credit specifying who took the photo. Captions should generally be between 25 and 50 words.

The *Journal of Military Learning* (*JML*) will not consider for publication a manuscript failing to conform to the guidelines above.

The editors may suggest changes in the interest of clarity and economy of expression; such changes will be made in consultation with the author. The editors are the final arbiters of usage, grammar, style, and length of article.

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