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Next Generation Leadership and Implications for Special Operations Forces

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Abstract

In this CNA-initiated study, we examine the potential implications of cross-generational leadership issues for the future of special operations forces (SOF). Specifically, we answer the following questions: (1) What are the predominant traits associated with SOF leadership today? (2) What are the most relevant traits of leadership for today's younger generations? (3) What are the traits of leadership required by the future security environment? (4) How do these traits compare, and what are the implications for the future of SOF leadership? To answer these questions, we conducted semi-structured discussions with 29 current and past senior SOF leaders, reviewed rigorous empirical and theoretical research, and examined popular narratives and informed opinions about the characteristics, traits, and attitudes of today's younger generations, as well as the requirements of military leadership on the future battlefield. We found that SOF do not have a single leadership philosophy, SOF do not have a codified set of leadership traits, SOF leadership traits are generally aligned to younger generations and the future operating environment, the mixed experience of SOF with leadership development is not well aligned to younger generations or the future operating environment, and the evolution of SOF leadership traits is partially aligned with the requirements of younger generations and the future operating environment.

Cover image: Major General John Deedrick, 1st Special Forces Command (Airborne) commanding general, offers a coin to a newly promoted psychological operations noncommissioned officer during a promotion ceremony larger than any other in Army special operations history, May 31, 2019 (US Army photo by Specialist Thiem Huynh).

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Executive Summary

In this CNA-initiated study, we sought to examine the potential implications of cross-generational leadership issues for the future of special operations forces (SOF). Specifically, we sought to answer the following questions:

1. What are the predominant traits associated with SOF leadership today?
2. What are the most relevant traits of leadership for today's younger generations?
3. What are the traits of leadership required by the future security environment?
4. How do these traits compare, and what are the implications for the future of SOF leadership?

To answer these questions, we conducted semi-structured discussions with 29 current and past senior SOF leaders, reviewed rigorous empirical and theoretical research, and examined popular narratives and informed opinions about the characteristics, traits, and attitudes of today's younger generations, as well as the requirements of military leadership on the future battlefield. We examined these sources in the context of the "paradoxical trinity of leadership" (shown in the figure), which connects leadership traits across leaders, followers, and context.

The "paradoxical trinity of leadership"
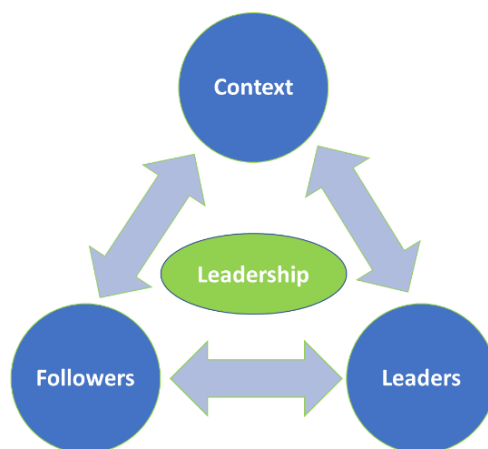
Source: Al Boyer and Cole Livieratos, "The Paradoxical Trinity of Leadership," Modern War Institute at West Point, June 13, 2022, and Stanley McChrystal, Jeff Eggers, and Jay Mangone, *Leaders* (Portfolio/Penguin, New York, NY: 2018). In this study, we also refer to this model as the "SOF leadership trinity."

By comparatively examining traits of leadership present in today's senior SOF leaders, those most relevant to today's younger generations, and those deemed necessary for the future

operating environment, we identified the following findings and recommendations to help the SOF enterprise develop and sustain high-quality, relevant, and effective future leaders. Of note, given the mixed veracity of the information that was available to support answering our research questions, we advise readers to consider our results as suggestive rather than conclusive.

Findings

***SOF do not have a single leadership philosophy*:** The SOF subject matter experts (SMEs) we interviewed for this study were roughly split regarding whether they believed SOF have a single or consistent philosophy of leadership. The most prevalent philosophy cited by those who did think so was *mission command*, but this was cited by only 6 of 22 respondents. Two additional facts support the idea that there is no single philosophy shared widely across the SOF enterprise. First, doctrine pertaining to special operations exists within each of the military services, but these publications do not address leadership of SOF or special operations. There is also a joint publication for special operations, but it similarly does not directly address a philosophy of SOF leadership. Second, special operators are professionally developed as members of both the SOF enterprise and their service—and there is no overarching philosophy of leadership spanning the services either.

***SOF do not have a codified set of leadership traits*:** We synthesized the results of our interviews with SOF SMEs to generate a list of special operations leadership traits in order of prevalence; however, even the most cited trait (character) was named by less than half of the respondents. Of 23 total traits, only three (character, creativity, and flexibility) were cited by more than 30 percent of SMEs. This lack of consensus runs counter to the Army and Marine Corps, each of which have very detailed doctrinal publications that address their desired leadership traits; in contrast, the Air Force has a less detailed non-doctrinal publication on leadership, and the Navy lacks formal guidance on desired leadership traits.

***SOF leadership traits are generally aligned to younger generations and the future operating environment*:** The traits we identified through our engagements with SOF SMEs do not constitute an official set of desired SOF leadership traits; nonetheless, they align well with the traits we identified as being potentially applicable to leading Millennials and members of Generation Z (also called "Gen Z" or "Gen Zers"), as well as traits deemed likely suited for success on future battlefields. The top four (character, creativity, flexibility, and determination) and seven of the top ten[1] traits cited by SOF SMEs also appeared in our literature summaries

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[1] These traits are competence, being a relationship builder, trustworthiness, being a problem-solver, approachability, empowerment, and being a risk-taker.

for the other two categories. Thus, though SOF do not have a formally articulated set of desirable leadership traits, those they informally describe as being important seem generally well aligned to the future of the SOF leadership trinity.

The mixed experience of SOF with leadership development is not well aligned to younger generations or the future operating environment: The SOF SMEs with whom we spoke had as mixed a set of experiences with leadership development as could be imagined. Some had extensive professional military education (PME), while others had little to none. Some described the PME they received as high quality and helpful, while others described it as essentially useless. Roughly half of the SOF SMEs had mentors who helped them through their careers, while the other half described learning by doing and emulation of leaders they admired as mechanisms for their development. Our research suggests that this inconsistency in leadership development is misaligned to the expectations of Millennials and members of Gen Z, who are the most well-educated Americans in history. Millennials and Gen Zers are also believed to desire mentor/teacher-style leaders and organizations that invest substantially, directly, and clearly in them as individuals. Experts writing on the demands of the future battlefield identified a requirement for military leaders to become more intellectual, analytic, and technically knowledgeable to be successful. These demands also suggest a requirement for deliberate, continued education and for mentorship of future SOF leaders.

The evolution of SOF leadership traits is partially aligned with the requirements of younger generations and the future operating environment: Some SOF SMEs thought that interpersonal skills, the ability to build relationships, intelligence, and awareness of operators had improved over the course of their careers, and that SOF were more transparent in explaining what they do and why they do it, both privately and publicly. Others said SOF leaders have gotten worse at holding operators—and each other—accountable for their actions. These leaders also cited a decrease in good order and discipline, overemphasis on the special or elite nature of SOF, and over-reliance on throwing resources at problems rather than thinking creatively or unconventionally about solving them as negative trends.

In comparing these responses to what the literature had to say about how to lead younger generations and the requirements of the future operating environment, we found that the perceived improvements cited by SOF leaders align well to future requirements for operators who are more educated, analytic, perceptive, collaborative, and transparent in what they do. The perceived shortfalls cited, however, do not. In particular, the perceived decline in SOF accountability runs squarely counter to the emphasis of Millennials and members of Gen Z on ethical, values-driven leadership. Additionally, the increased emphasis on the elite nature of SOF may appeal to younger generations based on research showing steadily increasing rates of narcissism; however, some leaders saw the focus on the elitism of SOF as a negative trend. Other negative trends cited by some SOF leaders, such as declines in good order and discipline

and less creative (more resource-centric) problem-solving tendencies, also appear to run counter to the requirements of the future battlefield.

Recommendations

US Special Operations Command (SOCOM) should identify and publish a leadership philosophy: Given the general disunity among SOF SME responses on this topic, SOCOM could, in principle, start virtually anywhere in creating such a philosophy, though it seems that mission command is a good starting point. Even so, we suggest that SOCOM should not simply embrace mission command wholesale. Rather, we recommend that it consider moving beyond mission command—which primarily focuses on a hierarchical approach to leadership—and develop a leadership philosophy more akin to the "Team of Teams" approach articulated by General (ret.) Stanley McChrystal and his co-authors in their book of that title. Such an approach, which is more aligned to collective models of leadership, seems more likely to be optimally suited to the ways in which SOF typically operate, to the complexity of the future battlefield, and to the less hierarchical and more decentralized leadership preferences of today's younger generations.

SOCOM should develop and codify a set of desired leadership traits focused on the SOF leadership trinity: We recommend that SOCOM begin with the list of traits that we identified as being central to the future SOF leadership trinity—*character*, *creativity*, *flexibility*, *determination*, *competence*, *being a relationship builder*, *trustworthiness*, *being a problem-solver*, *approachability*, *empowerment*, and *being a risk-taker*—and build on those in the context of its own analysis of future SOF operating concepts, future battlefield requirements, and the future leadership preferences of young special operators. As it does so, we recommend that it examine some of the noteworthy findings of our comparative analysis and their implications for SOF leader development. One of these is the presence of *transparency* as a desired leadership trait in the "followers" and "context" categories of the SOF leadership trinity but the absence of it in the mentions of SOF leaders. Another is the absence of *team player*, *initiative*, *independence*, *maturity*, *dedication*, and *commitment*—traits cited by the SOF leaders we interviewed—from the other two categories. SOCOM should then use this list of leadership traits to drive its efforts—and those of its service components and supporting entities such as the Joint Special Operations University (JSOU)—to develop future SOF leaders in a consistent, coherent, and deliberate way.

The Assistant Secretary of Defense for Special Operations and Low-Intensity Conflict (ASD(SO/LIC)) should assess the adequacy of SOF PME and mentorship opportunities: We recognize that SOCOM relies on the services for formal PME and that it has little sway over the content of those programs. That should not, however, prevent it and ASD(SO/LIC) from assessing the adequacy of those programs for the needs of special operators and leveraging

forums such as the Special Operations Policy and Oversight Council to advocate for necessary changes. A formal review of available PME could also help JSOU further tailor the courses that it offers to fill gaps specific to special operations that service PME schools are missing when it comes to developing leadership traits for SOF. We also recommend that ASD(SO/LIC), in conjunction with SOCOM, catalog and assess the adequacy of mentorship programs and approaches across the SOF enterprise. We did not detect a desire from any of the sources we examined for the formal assignment of mentors to new special operators—the general view was that mentorship relationships are best developed organically. However, the formation of such relationships does not need to be left to chance, since there are ways to encourage the informal formation of such relationships.

SOCOM should reinforce efforts to improve SOF accountability: Fixing the conditions that led to consistent ethical lapses and making lasting changes to SOF culture—as described in SOCOM's Comprehensive Review from 2019—require sustained attention. In reviewing literature pertaining to the desires of Millennials and members of Gen Z, we identified a focus on *accountability* and *values-based leadership* as being critically important. Accountability was also one of the five leadership traits articulated in a recent high-level publication by joint and service enlisted leaders as being required for future senior enlisted servicemembers. We therefore recommend that SOCOM, under the oversight of ASD(SO/LIC), maintain a steady focus on the accountability of SOF leaders going forward. Such accountability is likely to continue to be demanded by Congress, and it also seems likely to be demanded by younger generations of special operators.

Conclusion

This study represents the first detailed examination of SOF leadership through the lens of the "SOF leadership trinity" as it pertains to younger generations of special operators. If ASD(SO/LIC) and SOCOM take the steps we recommend above, the force would be on a firmer footing for the deliberate, thoughtful development of future SOF leaders. As General Richard Clarke stated in his 2022 congressional posture hearing, SOCOM's "commitment to high ethical standards, engaged leadership, and maintaining accountability within SOF is critical to sustaining the trust earned over decades."[2] The findings and recommendations in this report should help the SOF enterprise as it seeks to maintain that commitment.

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[2] "Statement of General Richard D. Clarke, USA, Commander, United States Special Operations Command Before the 117th Congress House Committee on Appropriations Subcommittee on Defense," SOCOM, Apr. 7, 2022.

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Contents

Introduction

Each year, the Joint Special Operations University (JSOU) publishes a book of suggested research topics for special operations forces (SOF).[3] The 2022 version of this book includes a topic titled "SOF and Cross-Generational Leadership," which suggests that today's younger generations may have leadership styles and preferences that differ markedly from those of the generations that came before them.[4] In particular, the discussion of this topic includes questions such as: What leadership styles are best suited for younger generations? How might older generations understand the needs of younger generations? What are the strengths and weaknesses of different leadership styles in SOF?

Research questions

In this CNA-initiated study, we sought to examine the potential implications of cross-generational leadership issues for the future of SOF. Specifically, we sought to answer the following questions:

1. What are the predominant traits associated with SOF leadership today?[5]
2. What are the most relevant traits of leadership for today's younger generations?[6]

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[3] For the purposes of this paper, we use *special operations* and *SOF* as defined in "Joint Publication 3-05: Joint Doctrine for Special Operations," Joint Chiefs of Staff, Sept. 22, 2020.

[4] "Special Operations Research Topics 2022," JSOU, 2022, available at https://jsou.libguides.com/ jsoupublications/researchtopics. For the purposes of this study, we use the term *leadership* in a personal sense: efforts by designated leaders within the SOF enterprise to personally lead those individuals and units that have been assigned to them. We do not use it in an operational sense (e.g., command and control processes or technologies), nor in a structural or organizational one (e.g., command relationships between established SOF headquarters). Also, we recognize that leadership exists at multiple levels within the military, from tactical to strategic and from junior to senior. This paper focuses on leadership at senior levels of SOF—general and flag officers and their enlisted equivalents—though we recognize that the discussion may have relevance at other levels as well.

[5] We define today's senior SOF leaders as special operators at the O-6 / E-7 or higher ranks and Senior Executive Service (SES) civilians actively serving within the SOF enterprise, as well as those with such experience within the past five years (currently retired or actively serving outside the SOF enterprise).

[6] The term *generation* refers to a group of people of a similar age who experience similar historical events. With this definition, it is difficult to develop distinct age and experience categories to use for empirical analysis. Yet, many writers use the term *generation* to distinguish among groups of people. See: David P. Costanza, Jessica M.

3. What are the traits of leadership required by the future security environment?

4. How do these traits compare, and what are the implications for the future of SOF leadership?

The differences between these questions and those posed by JSOU result from our desire to address a set of questions that could be analytically connected. The four questions above are connected in two ways. First, they are linked through a focus on *traits of leadership* as a variable for comparative analysis.[7] We chose this variable because traits (sometimes also called *attributes*) constitute a core component of the way the military services[8] articulate their beliefs about leadership (as will be discussed in the following sections). Second, they are linked through a leadership framework that identifies *leaders*, *followers*, and *context* as being interrelated aspects of leadership.

The leadership trinity

These three interrelated aspects of leadership—leaders, followers, and context—are drawn from what has been called the "paradoxical trinity of leadership"[9] described by authors Stanley McChrystal, Jeff Eggers, and Jay Mangone in their book *Leaders* (Figure 1).[10] For this study, we also refer to this concept as the "SOF leadership trinity." By focusing on the traits of leadership present in today's senior SOF leaders, those most relevant to today's younger generations, and those deemed necessary for the future operating environment, we aim to identify implications

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Badger, Rebecca L. Fraser, Jamie B. Severt, and Paul A. Gade, "Generational Differences in Work-Related Attitudes: A Meta-Analysis," *Journal of Business and Psychology* 27:4 (2012), pp. 375-394 and National Academies of Sciences, Engineering, and Medicine, "Are Generational Categories Meaningful Distinctions for Workforce Management?" Today's senior SOF leaders are from the Baby Boomer generation (born 1946–1964) or from Generation X (1965–1980). SOF below the senior level are predominantly from Gen X or the Millennial generation (1981–1996), while the immediate future of SOF recruits will come from Generation Z (1997–2012).

[7] We use the term *trait* in accordance with *The Oxford English Dictionary* definition: "a distinguishing quality or characteristic." *Traits* are distinguished from *competencies* or *skills*, which are defined by Oxford as the ability to do something effectively, efficiently, or well. Traits can therefore be more difficult to assess than competencies or skills, though methods—such as personality and psychological assessments—have been developed to do so, and SOF have used such methods for many years. See: John Faunce, "A History of Assessment and Selection," *Special Warfare Magazine* (July-Dec. 2016).

[8] We use the term *services* in this report to refer to the Army, Air Force, Navy, and Marine Corps. We do not include the Space Force in this discussion because it does not have a SOF component.

[9] Al Boyer and Cole Livieratos, "The Paradoxical Trinity of Leadership," Modern War Institute at West Point, June 13, 2022, https://mwi.usma.edu/the-paradoxical-trinity-of-leadership.

[10] Stanley McChrystal, Jeff Eggers, and Jay Mangone, *Leaders* (Portfolio/Penguin, New York, NY: 2018).

and recommendations to help the SOF enterprise develop and sustain high-quality, relevant, and effective future leaders.

Figure 1.   The "paradoxical trinity of leadership"
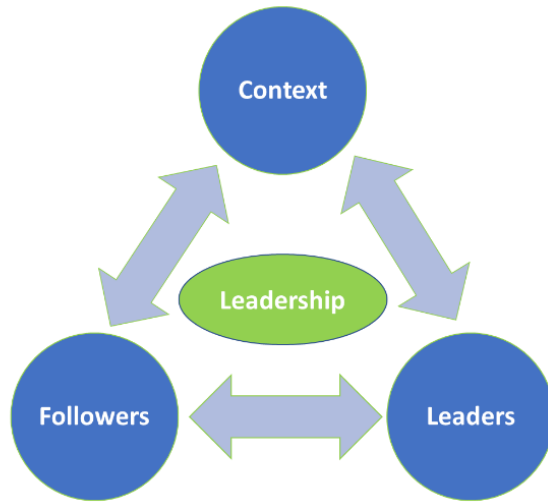
Source: Adapted from Boyer and Cole, "The Paradoxical Trinity of Leadership," and McChrystal, Eggers, and Mangone, *Leaders*.

Organization

The remainder of this report will be organized into seven sections. The first will address our study approach and key caveats about the veracity of our findings relative to the data available for the study. The next four sections will address each of the four study questions in turn. The sixth section will present our findings and recommendations for the SOF enterprise going forward. This will be followed by a brief conclusion. We also include an appendix that presents the details of our subject matter expert (SME) engagements.

Study Approach and Caveats

Approach

To answer our four study questions, we employed a four-part approach, as follows:

1. We engaged in semi-structured discussions with 29 active duty and retired senior special operators (officers and enlisted), as well as senior civilians with experience overseeing elements of the SOF enterprise. The questions that we used to guide these engagements and the aggregate details of the individuals we engaged (e.g., numbers by service) can be found in the appendix. Two analysts captured notes from these engagements, which we merged to form a single dataset for analysis. We used the NVivo software package to analyze these notes. That analysis allowed us to identify key themes from the discussions, such as the predominant traits that these senior SOF leaders associated with leadership today.

2. We reviewed and summarized literature on the characteristics, traits, and attitudes of Millennials and members of Generation Z (also called "Gen Z" or "Gen Zers"). We prioritized empirical studies and peer-reviewed literature that sought to identify cohort-level (i.e., generational) effects, but we found this literature to be sparse on the topics of leadership and the military. We therefore also summarized literature on popular narratives surrounding Millennials and Generation Z, while acknowledging that this literature tends to be anecdotal. We discuss caveats regarding these data sources below. We then summarized the leadership traits and approaches that these sources suggested are best suited to Millennials and members of Gen Z.

3. We examined literature pertaining to the future operating environment, specifically sources that discussed the leadership requirements to be successful within it. This body of literature predominantly consisted of writings by SMEs on the future of war and on military leadership. We summarized this literature to identify leadership traits that such experts believe will be required for success on future battlefields.

4. We conducted a qualitative, comparative analysis of the results of the first three steps—using the SOF leadership trinity framework—to identify findings of interest to the SOF enterprise and implications of those findings. We also identified recommendations for the Assistant Secretary of Defense for Special Operations and Low-Intensity Conflict (ASD(SO/LIC)) and US Special Operations Command (SOCOM) that stem directly from our findings.

Data caveats

We acknowledge that our sample of SOF SMEs is relatively small, as is the amount of rigorous literature on the leadership preferences of today's younger generations. We also acknowledge the speculative nature of "future of war" literature. Although we would have appreciated using more robust sources as the data for this study—especially pertaining to members of Gen Z and the future of war—such sources simply do not exist. We therefore attempted to make the best use of what was available. Given these caveats, we encourage readers to view our results as suggestive and potentially illuminating for further research in this area, rather than definitive or comprehensive in nature.

Special Operations Leadership Today

In this section, we present our analysis of the information we gathered via SME engagements. Specifically, we address whether SOF have an overarching philosophy of leadership, what traits SOF leaders identify as being the most salient for special operations leadership, how those traits are developed in SOF leaders, and to what extent those traits (and the nature of SOF leadership) have evolved over the past generation of special operations.

Special operations leadership philosophy

As shown in the appendix, the first question we asked the SOF SMEs was whether a basic philosophy of special operations leadership exists and, if so, how they would articulate it. SOF SME responses varied considerably on this topic. Of the 22 SMEs who were willing and able to comment on this question, 12 responded that such a philosophy existed or clearly articulated one in their response. The rest either said that no philosophy existed (4 respondents) or did not clearly articulate one in their comments (6 respondents). Table 1 shows the specific philosophies that were articulated in the 12 affirmative responses along with the number of respondents for each.

Table 1.   Articulations of SOF leadership philosophy

Philosophy	Number of Respondents
Mission command[11]	6
Solving problems by being aggressive, flexible, and adaptive	3
First SOF Truth: Humans are more important than hardware	2
Leading by example	1
None / not clearly articulated	10

Source: CNA.

Of the 10 respondents who either said that SOF did not have a specific philosophy of leadership or did not articulate one, three stated that leadership within SOF is effectively the same as within any military organization (or, according to one respondent, within any major

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[11] *Mission command* is defined by the Department of Defense (DOD) as "the conduct of military operations through decentralized execution based upon mission-type orders." *Mission-type orders* are defined as either "an order issued to a lower unit that includes the accomplishment of the total mission assigned to the higher headquarters" or "an order to a unit to perform a mission without specifying how it is to be accomplished." See: *DOD Dictionary of Military and Associated Terms*, Joint Chiefs of Staff, Mar. 2022, pp. 144-145.

organization, including private businesses). And two respondents stated that the SOF enterprise is not coherent enough to have a single philosophy of leadership, given that it is composed of numerous distinct organizations, including SOCOM's four service components: US Army Special Operations Command (USASOC), US Air Force Special Operations Command (AFSOC), Naval Special Warfare Command (NAVSPECWARCOM), and US Marine Forces Special Operations Command (MARSOC). This view seems logical, but it is also challenged by the fact that the six respondents who described mission command as the overarching philosophy of SOF leadership spanned three of SOCOM's four service components.

Special operations leadership traits

Top 10 SOF leadership traits

In response to our questions about the most important attributes[12] of special operations leadership, SOF SMEs responded as shown in Figure 2. The top three traits cited as being the most important—each of which were named by at least 30 percent of respondents—were character,[13] creativity,[14] and flexibility.[15] Seven additional traits were cited by at least 20 percent of respondents. These were determination,[16] being a team player,[17] competence,[18] humility,[19] being a relationship builder,[20] trustworthiness,[21] and intelligence.[22] Together, these represent the top 10 leadership traits identified by SOF SMEs during our engagements.

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[12] We discovered after conducting our interviews that the military services tend to use the word *trait* instead of *attribute*. Though these terms are synonymous, we use the former in our discussion for the sake of consistency with the services.

[13] Synonymous or related terms used by SOF SMEs were *ethical*, *honesty*, and *integrity*.

[14] Synonymous or related terms used by SOF SMEs were *innovative* and *visionary*.

[15] Synonymous or related terms used by SOF SMEs were *adaptability*, *agility*, and *being an early adopter*.

[16] Synonymous or related terms used by SOF SMEs were *drive*, *tenacity*, *passion*, *desire*, *resilience*, *persistence*, and *grit*.

[17] Synonymous or related terms used by SOF SMEs were *consistent*, *predictable*, *dependable*, and *calm*.

[18] Synonymous or related terms used by SOF SMEs were *ability*, *knowledgeable*, and *professional*.

[19] A related phrase used by SOF SMEs was "able to admit mistakes."

[20] Synonymous or related terms used by SOF SMEs were *diplomatic*, *lateral thinker*, *communicator*, and *team builder*.

[21] A related term used by SOF SMEs was *credibility*.

[22] Synonymous or related terms used by SOF SMEs were *cognitive* and *curious*.

Figure 2. Percentage of SOF leaders citing specific leadership traits
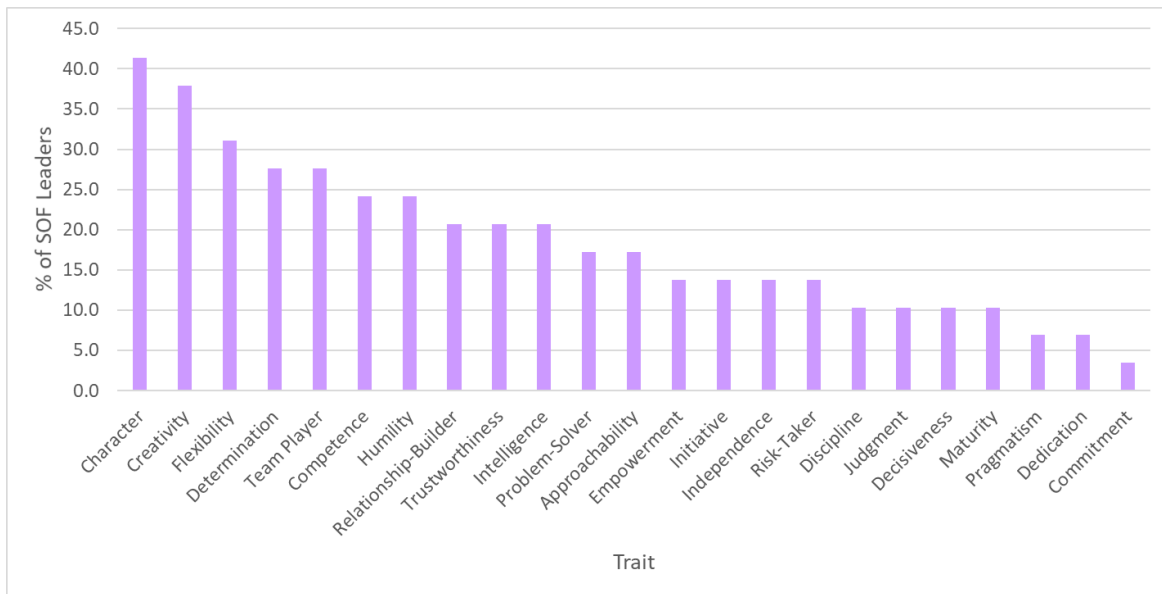
Source: CNA.

No single list of leadership traits exists within the US military against which to compare these results. Rather, each military service has its own list, as shown in Table 2. The Army and Marine Corps have documented their institutional views on leadership traits extensively in the Army's doctrinal publication *Army Leadership and the Profession* and in the Marine Corps' warfighting publication *Leading Marines*. We were unable to identify similar doctrinal publications for the Air Force or Navy and had to discern their desired leadership traits from other institutional sources (see the notes to Table 2).

Table 2. Leadership traits of the US military services and the top 10 traits identified by SOF SMEs

Trait	Army[a]	Air Force[b]	Navy[c]	Marine Corps[d]	SOF[e]
Character / Honor / Integrity	X	X	X	X	X
Decisiveness / Confidence	X	X		X	
Unselfishness / Selflessness	X	X		X	
Determination / Endurance / Toughness / Resilience	X		X	X	X
Loyalty	X	X		X	
Judgment	X			X	
Initiative			X	X	
Tact / Respect	X			X	
Bearing / Presence / Fitness	X			X	

Trait	Army[a]	Air Force[b]	Navy[c]	Marine Corps[d]	SOF[e]
Enthusiasm / Energy		X		X	
Courage	X			X	
Competence / Knowledge / Expertise	X			X	X
Commitment / Duty	X	X			
Discipline / Accountability	X		X		
Justice				X	
Team Player / Dependability				X	X
Empathy	X				
Creativity / Innovation	X				X
Humility	X				X
Flexibility					X
Relationship builder					X
Trustworthiness					X
Intelligence					X

Sources:
[a] "ADP 6-22: Army Leadership and the Profession," US Department of the Army, July 2019.
[b] "Volume II: Leadership," Curtis E. LeMay Center for Doctrine Development and Education, Aug. 8, 2015.
[c] "Navy Leader Development Framework Version 3.0," US Navy, May 2019.
[d] "MCWP 6-11: Leading Marines," US Marine Corps, Nov. 27, 2002.
[e] CNA engagements with SOF SMEs.

In Table 2, those leadership traits cited as being desired by more than one service are italicized. Of these, SOF SMEs described *character*, *determination*, and *competence* as also being in the top 10 most important traits for leadership of special operations. Traits that SOF SMEs identified that are specifically desired by only one of the services are *creativity*, *being a team player*, and *humility*. Four of the traits SOF SMEs identified are not cited by any of the services as being key traits for their leaders: *flexibility*, *being a relationship builder*, *trustworthiness*, and *intelligence*. We summarize these results in Table 3.

Table 3.   Comparison of top 10 SOF leadership traits and those of the services

SOF + Multiple Services	SOF + One Service	SOF Only
Character (1)	Creativity (2)	Flexibility (3)
Determination (4)	Being a team player (5)	Being a relationship builder (8)
Competence (6)	Humility (7)	Trustworthiness (9)
		Intelligence (10)

Source: CNA.
Note: The number in parentheses shows the ranking of the trait on the SOF top 10 list.

Taking these results together, we made the following observations:

- The most common leadership trait identified by SOF SMEs in Figure 2 (character) is also a desired leadership trait for all four of the military services (referred to as character/honor/integrity).

- The second most common trait for SOF (creativity) is shared by only the Army, and the third most common trait (flexibility) is unique to SOF.

- Of the top 10 leadership traits cited by SOF SMEs, four (flexibility, being a relationship builder, trustworthiness, and intelligence) are not cited by any of the military services and appear to be unique to SOF.

- Four of the traits cited by at least two of the services were not mentioned at all by SOF SMEs: unselfishness/selflessness, tact/respect, bearing/presence/fitness, and enthusiasm/energy.

SOF leadership traits by service

Given that each of the services has its own list of desired leadership traits and the fact that special operators are generated by SOCOM's four service components, we found it instructive to also compare the traits mentioned by the SOF SMEs broken out by their service backgrounds. We acknowledge that the numbers presented here are small and should therefore not be considered conclusive samplings—this discussion is presented as suggestive rather than conclusive.

Army

Figure 3 shows the percentage of the 15 Army SOF SMEs who cited specific traits as being important for SOF leadership. For these Army SOF leaders, the top three traits were flexibility, creativity, and being a relationship builder, each of which was cited by at least 6 of the 15 respondents (40 percent). An additional six traits were cited by at least a third of respondents. These were character, determination, being a team player, competence, humility, and being a problem-solver. Of these nine traits, five are also cited by the conventional Army as being important for leadership (creativity, character, determination, competence, and humility). The traits that may be unique to Army SOF are being a relationship builder, being a team player, and being a problem-solver.

Figure 3.   Percentage of Army SOF leaders citing specific leadership traits
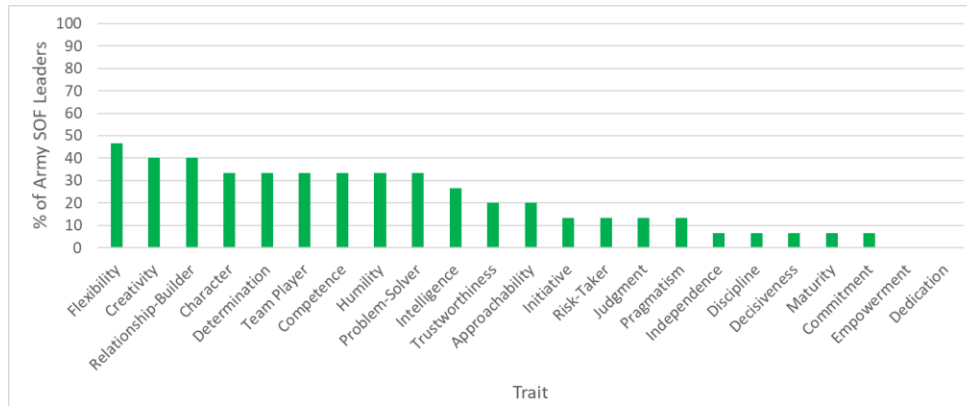
Source: CNA.

Air Force

Figure 4 shows the percentage of the five Air Force SOF SMEs who cited specific traits as being important for SOF leadership. For these Air Force SOF leaders, the top three traits were character, independence, and creativity. Two additional traits that were mentioned by at least two of the five respondents were trustworthiness and initiative. Of these five, only character is also cited by the conventional Air Force as a desired leadership trait—the others may be unique to Air Force SOF.

Figure 4.   Percentage of Air Force SOF leaders citing specific leadership traits

Source: CNA.

Navy

Figure 5 shows the percentage of the four Navy SOF SMEs who cited specific traits as being important for SOF leadership. For these leaders, the top three traits were empowerment, character, and being a team player. Three additional traits that were mentioned by at least two respondents were competence, discipline, and dedication. The only trait among these that is also cited by the conventional Navy is character; the other five may be unique to Navy SOF.

Figure 5. Percentage of Navy SOF leaders citing specific leadership traits
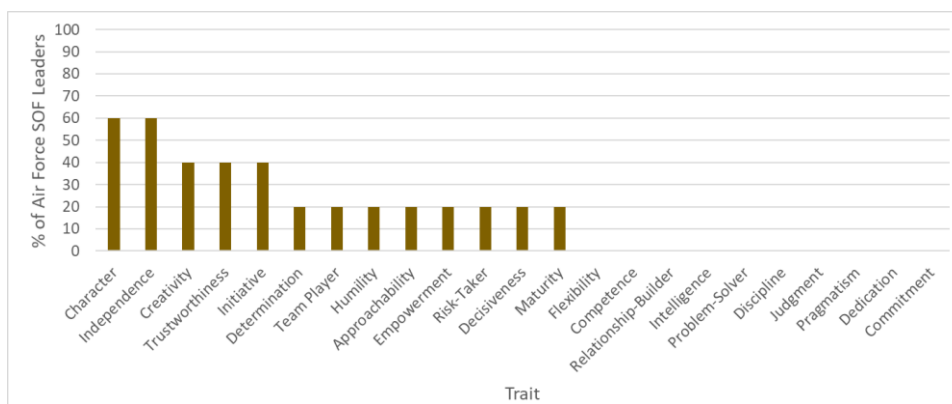

Source: CNA.

Marine Corps
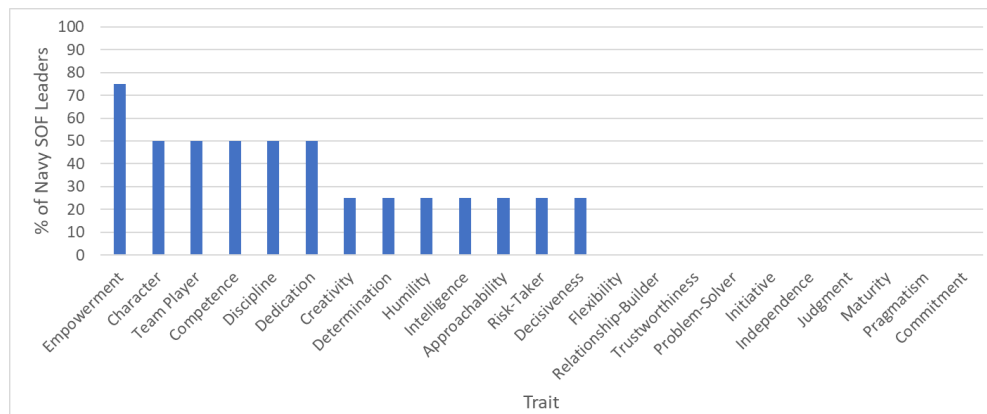
Figure 6 shows the percentage of the three Marine SOF SMEs who cited specific traits as being important for SOF leadership. For these Marine SOF leaders, the top trait—and the only one cited by more than one respondent—was *character*. This trait is also cited by the conventional Marine Corps as being important for its leaders.

Figure 6.   Percentage of Marine SOF leaders citing specific leadership traits
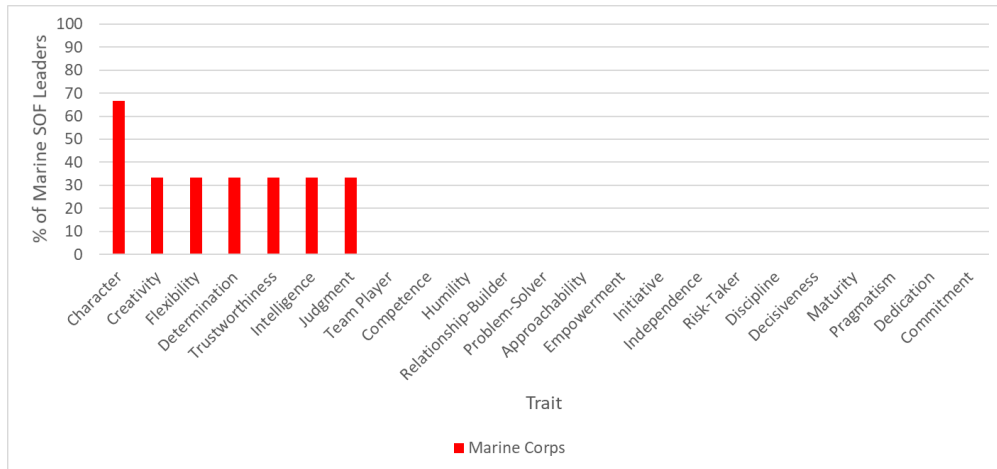
Source: CNA.

Table 4 summarizes these results by showing the top traits identified by service SOF SMEs. Traits that are underlined were also institutionally identified by each service as important for its leaders. Though character is a top trait for each of the SOF service components, there is little overlap among the other traits cited by service SOF leaders. Further, five of the nine traits cited by Army SOF leaders are also Army institutional traits, but there was little overlap of the responses from the other SOF leaders and their respective service views.

Table 4.   Top leadership traits cited by service SOF leaders

Army	Air Force	Navy	Marines
Flexibility	Character	Empowerment	Character
Creativity	Independence	Character	
Relationship Builder	Creativity	Team Player	
Character	Trustworthiness	Competence	
Determination	Initiative	Discipline	
Team Player		Dedication	
Competence			
Humility			
Problem-Solver			

Source: CNA.
Note: The underlined traits were also cited by each military service. Traits are listed in order of prevalence of citations by SOF SMEs of each service.

The observation that SOF service leaders' views of important leadership traits rarely overlapped with the institutional views of their parent services comports with the responses

SOF SMEs provided when asked whether SOF leadership traits were somehow "special" in relation to those of conventional forces. Of the 26 respondents who addressed this question, only two replied that the desired leadership traits for SOF were no different than those for the rest of the military. That said, only four of the 26 respondents emphatically answered "yes" to this question. The remaining 20 respondents gave an answer that could best be characterized as "kind of."

Most of these respondents stated that SOF leadership traits were not *special* (i.e., distinct in kind and character). Rather, they described ways in which leadership traits were valued or applied *differently* between the two types of forces. Some respondents pointed to differences in SOF culture—for example, its reliance on small teams with little support and the much closer (some said "peer-like") relationship between officers and enlisted—as a reason for SOF placing a stronger emphasis on junior leader development and empowerment than conventional forces. Others pointed to the inherent differences between conventional forces—for which mass and physical factors of war are important—and SOF—for which relationships, humans, and greater freedom of action are valued—as necessitating differences in emphasis among leadership traits between the two types of forces.

SOF leadership development

In addition to trying to identify the basic philosophy and key traits of SOF leadership, we sought to understand how SOF leadership skills may be gained or enhanced throughout a special operator's career. To do so, we asked special operations leaders whether they had received training, professional military education (PME), or mentoring on the specific leadership traits they described and, if so, how those experiences affected their development as leaders.

We received a wide variety of responses to this question, and slightly less than half of the 29 senior SOF SMEs did not articulate a direct answer to it. Thus, the discussion of training, PME, and mentorship that follows should be viewed as a starting point for further inquiry rather than conclusive.

Training

All of the SOF SMEs had undergone countless hours of training over the course of their careers. Yet, of the 16 respondents who chose to address training in their responses, only two cited specific training programs as being beneficial for leadership. One of these was Robin Sage, which is the culminating exercise for the selection and assessment of Army Special Forces

(SF).[23] The leader who mentioned it asserted that "any time an SF officer needs to think back on what it means to be a leader, they should think back to their experience at Robin Sage."[24] The other leader mentioned the Army's Joint Regional Training Center, National Training Center, and Ranger School as being "very good" at providing leadership training.[25] None of the other respondents, however, mentioned specific training programs as being useful for developing SOF leadership traits.

PME

Responses pertaining to PME varied as widely as could be imagined among the SOF SMEs. Eleven respondents mentioned having undergone PME schooling at some point in their careers, with several having attended multiple in- and out-of-service PME schools, including earning degrees at world-class civilian universities. In contrast, several respondents indicated undergoing little or no PME or leadership development at any time during careers that spanned two or three decades.

Among those who did undergo PME, responses varied. A few respondents echoed one operator's recollection of having received "a very solid education"[26] on leadership traits, while a majority of responses were at best neutral in their assessment of PME. One respondent stated that the Army's PME system "disappointed him at every level."[27] Another respondent stated that the Air Force does the best job at PME, while others argued that the Army and Marine Corps do a very good job with PME as well. Several respondents commented that the military school PME they had received was too heavily focused on conventional warfighting to be of utility to SOF, while another leader thought that the exposure to conventional warfighting principles helped SOF by broadening their thinking and helping them to better support and integrate with the joint force.

Several respondents stated that the real value of PME was not in the education itself, but in the relationships and personal network expansion that resulted from attending a military school. Five respondents cited emulation of leaders they admired as a primary way that they learned about leadership, while another five stated that experience via deployments and real-world operations was the best incubator for leadership traits. Four more described "self-study" (e.g.,

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[23] US Army John F. Kennedy Special Warfare Center and School Public Affairs, "Robin Sage Exercise Set," US Army, July 7, 2015, https://www.army.mil/article/151795/robin_sage_exercise_set.

[24] Semi-structured discussion with a senior SOF SME, Feb. 4, 2022.

[25] Semi-structured discussion with a senior SOF SME, Jan. 25, 2022.

[26] Semi-structured discussion with a senior SOF SME, Jan. 26, 2022.

[27] Semi-structured discussion with a senior SOF SME, Feb. 4, 2022.

reading books and articles on leadership, engaging in informal discussions on leadership with peers) as having been a key part of their development.

We observed other differences in responses among those who underwent PME. For example, several respondents cited relatively new leadership development courses at JSOU[28] as being high quality and helpfully focused on SOF-specific aspects of leadership, while one respondent feared that JSOU's courses would lead to SOF becoming even more isolated from the military services. In addition, multiple respondents saw benefits in the fact that SOCOM was not allowed to run its own PME schools and that SOF had to attend those of the services, while another leader declared that "SOCOM's reliance on the services for PME is a failed model."[29]

Mentorship

Just over half of the SOF SMEs expressed having had one or more mentors at some point in their career (Figure 7). All of these relationships were arranged outside of, or in the absence of, formal mentorship programs. The mechanism for their establishment varied from operators requesting that someone mentor them to a senior leader declaring a desire to serve as their mentor. Several respondents described mentors as having been invaluable to their development as leaders. Some even said that mentors had a stronger

Figure 7. Fraction of SOF SMEs who received mentorship
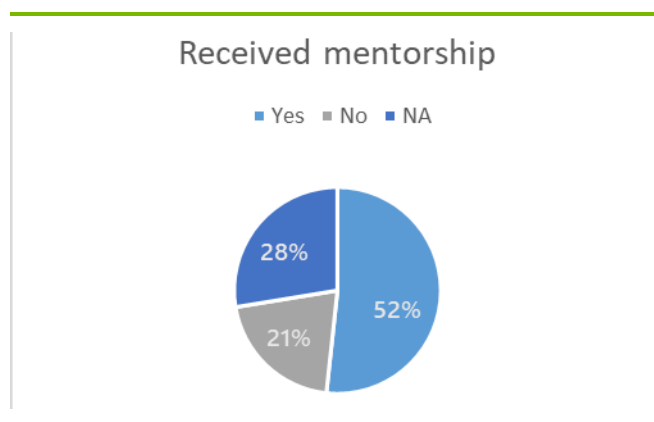
Source: CNA.

influence on their development of leadership traits than any training or PME that they had received. There did, however, seem to be universal agreement among respondents who had mentors that these relationships were best developed informally and that attempts to formally assign mentors (e.g., via institutionalized mentorship programs) are not effective.

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[28] These courses include titles such as *Enterprise Management Course, Joint Fundamental Course, Joint SOF Senior Enlisted Academy,* and *Summit.* See: JSOU's 2022 course catalog, available at: www.jsou.edu/Courses/Catalog.

[29] Semi-structured discussion with a senior SOF SME, Dec. 6, 2022.

Development opportunities

Respondents were about evenly split regarding whether they had received enough opportunities for training, PME, or mentorship during their careers. Among those who said they received enough opportunities, some had undergone extensive PME and were grateful for that education, while others had undergone very little and saw their increased operational opportunities as more helpful than PME for their development. Four respondents expressed a wish that more PME opportunities had been offered to them during their career; several of these noted that the time requirements for PME often conflicted with the priorities of their assigned units or with their operational tempo over the past 20 years.

SOF leadership evolution

In addition to asking SOF leaders about leadership traits that are important to SOF today, we asked them what they were looking for from leaders when they first entered the force, as well as how their perceptions of SOF leadership traits and their own leadership styles have changed over time.

Early expectations

The 23 respondents who answered our question regarding their expectations of SOF leaders when they first joined the force articulated 24 specific traits or other aspects of leadership. As shown in Figure 8, the items called out by four or more respondents were empowerment, mentorship, support, and competence. Based on respondents' comments, these themes reflect a general sense of wanting leaders to provide a purposeful mission, guidance and resources to perform that mission, modeling of the right way of approaching it, leeway to figure out the best means of doing so (without micromanagement), and room to make mistakes and learn from them. Most respondents stated that they had leaders who met at least some of these primary desires when they were young members of the force, although two respondents stated that they were disappointed with the quality of leaders they had early in their careers.

Figure 8.   Leadership expectations of SOF leaders when they were young adults
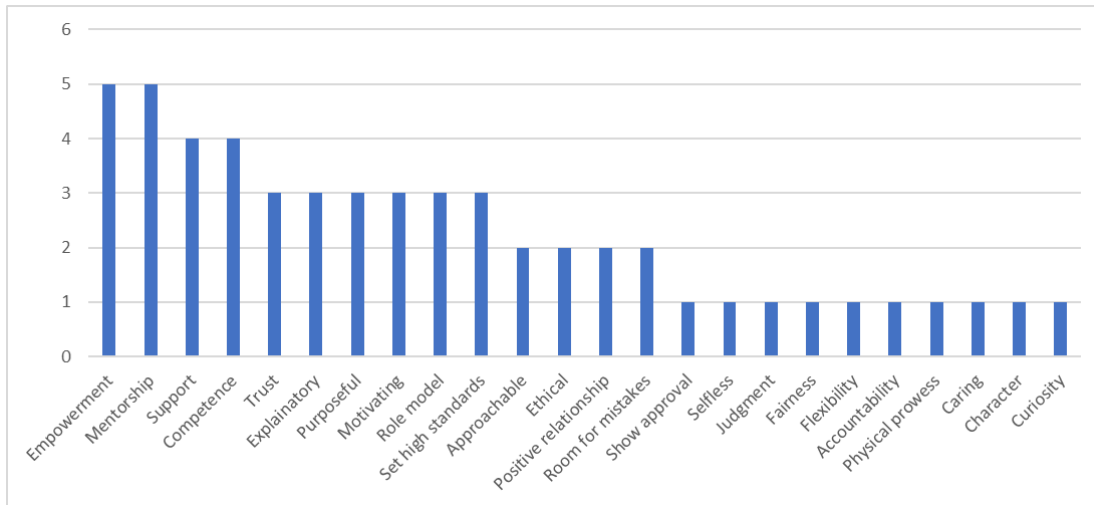
Source: CNA.

Evolution of leadership traits

When we asked SOF leaders whether the specific leadership traits they saw as being important for special operators had changed over the course of their careers, 16 respondents said "yes," 6 said "no," and 5 were not sure or did not answer. Of the respondents who felt that SOF leadership traits had stayed constant, two cited the five SOF Truths as being an essential, unchanging encapsulation of key SOF leadership principles.[30]

Of the respondents who felt that critical leadership traits had changed over time, six felt that things had changed for the better over their careers. These leaders said that SOF now emphasize interpersonal skills and relationship building more, that the intelligence and awareness of operators have improved, and that SOF are more open to explaining what they do and why they do it, both internally (to operators) and externally (to the public). Eight respondents, however, described elements of leadership that had gotten worse over time. They cited less accountability by SOF leaders of rank-and-file operators, a decrease in good order and discipline, an overemphasis on the special or elite nature of SOF, and an over-reliance on

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[30] The five "SOF Truths" are as follows: (1) Humans are more important than hardware, (2) Quality is better than quantity, (3) SOF cannot be mass produced, (4) Competent SOF cannot be created after emergencies occur, and (5) Most special operations require non-SOF support. See: "SOF Truths," SOCOM, www.socom.mil/about/sof-truths.

easy money at the expense of creative problem-solving as ways in which SOF leadership had degraded over the course of their careers.

Evolution of leadership styles

Of the 23 respondents who directly answered our question regarding whether their own leadership styles had changed over time, 22 answered affirmatively. When we asked them to share how their style had changed, 17 respondents described specific changes they believed they had made over time. As shown in Table 5, the most cited changes were being less confrontational and more empowering. Leaders described a shift from being less "in your face" toward subordinates and peers and more willing to use persuasion, influence, and negotiation to generate desired responses. And they described a shift from a more directive, authoritarian style of leadership to one in which they increasingly trusted and empowered subordinates to accomplish tasks and missions within parameters and to standards of accountability.

Two additional changes were cited by at least four respondents. One was a shift to being more thoughtful or strategic in their approach to leading others—for example, by focusing more on developing a shared vision with subordinates and peers or spending more time thinking "up and out" from their organization as opposed to "down and within" it. Another was a change from a focus on leading people to one on leading organizations, with the understanding that the latter inherently entails less ability to make personal connections with all organizational members. Leading organizations involves exerting leadership more indirectly through processes, focusing on doing only those things that the organizational leader can or must do, and empowering subordinates to identify problems, offer solutions, and execute those solutions with support from the top.

Table 5.   Personal leadership changes cited by SOF leaders

Change in Leadership Style	Count
Less confrontational	7
More empowering	7
More thoughtful/strategic	5
Shift to organizational vs. personal leadership	4
More visionary	3
Better communicator	3
More empathetic	3
More humble	2
Better listener	2
More relationship-focused	2
More flexible	2
Better self-health	1
More forthright	1
More patient	1
More compromising	1
More responsible	1
Better teacher	1

Source: CNA.

Future of SOF leadership

When we asked SOF leaders whether the nature of SOF leadership would need to change in the future, 13 respondents said "yes," nine said "no," and two were unsure. Those numbers somewhat belie the nuance of their responses, however. Those who responded that SOF leadership would need to change mostly described relatively minor adjustments, such as increased flexibility of leaders, increased focus on intelligence over physical aspects, and increased diversity of SOF leaders. Similarly, many who responded that SOF leadership did not need to change added that other aspects of the SOF enterprise—for example, structural or organizational aspects—would need to change going forward. In general, respondents considered the foundation of SOF leadership to be strong and expect it to remain so going forward, but they said that SOF leaders will need to continually adapt their leadership approaches and the nature of the SOF enterprise (as they have in the past) to stay ahead of both US adversaries and changes in the strategic environment.

Traits and Attitudes of Younger Generations Today

The JSOU study topic that was the genesis of this project focused on the idea of cross-generational differences in the leadership preferences of SOF. In our framing of this idea for this project, we ran into two practical difficulties. The first is that the idea of differences among generations tends to be more anecdotal than empirical (likely due to the methodological challenges in conducting empirical generational research). The second is that the bulk of interest on these issues to date has focused on the civilian workforce as opposed to the military or segments within it, such as SOF.

In this section, we first explain these challenges in more detail before presenting the results of the relevant literature that we identified, first for the Millennial generation and then for Generation Z. As in the previous section, our discussion here should not be considered a comprehensive rendering of this subject, but rather an initial foray into the intersection of generational effects with SOF leadership.

Information challenges

Generational research

The notion that significant differences exist between generations such as Baby Boomers, Generation X (also called "Gen X"), and Millennials (Figure 9) is a common idea, and popular media—as well as business and psychology publications—have considerable interest in comparing traits (especially within the workforce) of the young adults today with those of prior generations.[31] As one example, two researchers in 2019 conducted a Google search on "managing Millennials" and reported receiving four million entries, including articles with titles such as "A Boss's Guide to Managing Bratty Millennials," "A Baby Boomer's Guide to

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[31] However, there is no consensus view on which years specifically define generational cohorts, and different researchers sometimes use different cohort ranges. Those shown in Figure 9 should thus be viewed as illustrative, as opposed to definitional.

Managing Millennials at Work," and "Three Big Mistakes Leaders Make When Managing Millennials."[32]

Figure 9. Timeline of American generation names (1875–2035)
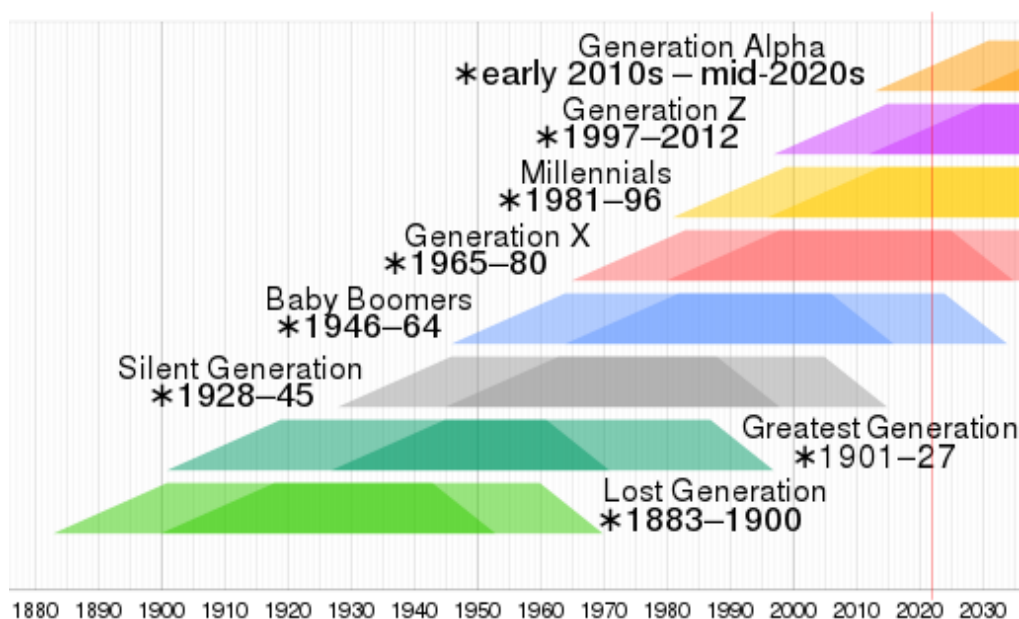
Source: Wikipedia Commons, available at:
https://en.wikipedia.org/w/index.php?title=File:Generation_timeline.svg&lang=simple.

Though this search was focused on the Millennial generation, these types of articles are not new, nor are the negative stereotypes associated with "young people" in the workforce. In a literature review of traits commonly attributed to Millennials, the authors noted that the same negative stereotypes about Millennials were attributed to Gen X (compared to Boomers) in a publication dating to 1999.[33] Put simply, scholars and industry professionals have long noted similarities and differences in the way large segments of their workforce operate and have attempted to draw conclusions about the ways these similarities and differences affect recruiting, compensation, retention, work design, and other work-related concepts.

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[32] Leah M. Omilion-Hodges and Christine E. Sugg, "Millennials' Views and Expectations Regarding the Communicative and Relational Behaviors of Leaders: Exploring Young Adults' Talk about Work," *Business and Professional Communications Quarterly* 82, no. 1 (2019): 74-100.

[33] Sergio Galdames and Laura Guihen, "Millennials and Leadership: A Systematic Literature Review," *Total Quality Management & Business Excellence* (2020): 1-17.

Though differences in these populations tend to be popularly portrayed as "generational" effects, in reality, the observed differences in the preferences and behaviors of people of different ages across a given population could be based on age, period, or generational (also called "cohort") effects.[34] *Age effects* are related to biological or maturation differences—for example, changes in investment behavior from people in their twenties beginning their careers to people in their sixties nearing retirement. *Period effects* are related to changes in society that affect everyone—for example, the proliferation of personal computers in the workplace (and personal use of them at home). Finally, *cohort effects* differentially affect segments of the population in ways that are not attributable solely to age. For example, the extensive use of the draft for military service in Vietnam could have created a cohort effect on American men aged 18–22 from 1969–1972. Although the draft and the Vietnam War affected the whole US population, the draft had a differential effect on the young men who were eligible for the draft lottery during that period.

It is critical to understand the observed and anecdotal differences across segments of the population because the nature of those differences could influence the way leaders and policy-makers address them. If the observed differences are based on period effects, then leaders and policy-makers should consider such effects to be contingent on an entire population of interest. If the observed differences are based on cohort effects, then leaders and policy-makers should consider approaches and policies that are tailored to specific cohorts within a population, while recognizing that such differences may be temporal. In contrast, differences due to age effects are likely to be pervasive and not dependent on what cohort young and old members of the population are in.

In contrast to the number of anecdotal articles that a Google search will return on the topic of generational differences, our reading of peer-reviewed journals revealed very few publications that empirically analyzed generational effects. This absence of research is largely the result of two methodologically challenging aspects of generational research: the need to clearly define cohorts of similar age with similar experiences, and the requirement for time-lag study designs in which different cohorts of individuals are studied at the same ages in order to separate cohort effects from age effects.[35] Both of these issues render the body of rigorously empirical research on generational effects far smaller than the millions of anecdotal articles residing on the internet. They also mean that rigorous, empirical research on the youngest generations has not yet occurred. As a result, our literature review for the youngest generations focused on studies of Millennials, since rigorously empirical studies are not yet widely available for

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[34] National Academies of Sciences, Engineering, and Medicine, "Are Generational Categories Meaningful Distinctions for Workforce Management?" National Academies Press, 2020, https://doi.org/10.17226/25796.

[35] Costanza et al., "Generational Differences in Work-Related Attitudes."

Generation Z or Generation Alpha. As a result, our discussion below primarily focuses on Millennials; however, because Gen Z young adults are of interest to SOF as their current pool of recruits, we include supplementary discussion on current views of Gen Z as well (drawing mostly on survey studies and anecdotal accounts).

Civilian versus military studies

Likely owing to the reduced access of academic researchers to the military relative to civilians and the less lucrative market for research on cohort effects in the military relative to the civilian business and marketing worlds, we could not identify any rigorous, empirical studies of the leadership preferences of younger generations in the military today compared to the preferences of prior generations. As a result, we broadened our aperture to consider works that spoke to issues of leading younger cohorts in the military today, even if they were not rigorously empirical or peer-reviewed studies. As a result, we identified several military theses and other reports that, though not as academically rigorous as the generational cohort studies we identified for the civilian workplace, nonetheless provide suggestions from servicemembers for how to think about leading younger adults in the military today.

Millennials

This section focuses on Millennials—which today comprise individuals roughly between 26 and 41 years old. We will first discuss characteristics and the popular narrative surrounding this generation, followed by sub-sections that discuss traits of Millennials and their attitudes toward work and leadership in civilian settings, as well as how to apply these ideas to the military.

Characteristics

The Millennial generation is substantially larger than Gen X and overtook the Baby Boomer generation in size in 2019 (exceeding 70 million Americans[36]). Millennials also now comprise the majority of US servicemembers.[37] This cohort grew up during the United States' longest period of continuous war. As two researchers stated, "They are as accustomed to news stories of al Qaeda, the Taliban, and the war on terror as they are to stories of perhaps all other foreign-

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[36] Richard Fry, "Millennials Overtake Baby Boomers as America's Largest Generation," Pew Research Center, Apr. 28, 2020, https://www.pewresearch.org/fact-tank/2020/04/28/millennials-overtake-baby-boomers-as-americas-largest-generation.

[37] Kanessa Trent, "Motivating and Educating Millennials," *Military Review* (Nov.-Dec. 2019).

policy issues combined."[38] As another author remarked, "Millennials have access to more combat footage [via the internet] than their parents ever saw from Vietnam and...unfettered, uncensored, and immediate access to soldiers' attitudes and frustrations while deployed."[39]

Other characteristics of Millennials that have been identified by the Pew Research Center through rigorous polling include the following:[40]

- *They are more diverse than Gen X or Boomers*: The fraction of adults among Millennials who are not White is higher than for prior generations, exceeding 40 percent of the cohort.

- *They are less attached to traditional institutions*: As of 2014, roughly half of Millennials identified themselves as political independents, and nearly a third did not identify a religious affiliation—numbers that substantially exceed those of prior generations. The trend in religious un-affiliation appears to be increasing over time.[41]

- *They are less economically secure*: Millennials were the first generation to experience the combination of high levels of student loans, poverty, and unemployment and low levels of wealth and personal income. Partly as a result, they have experienced reduced rates of marriage relative to prior generations at the same age, they were more likely to be found living at home while aged 25 to 35, and they have been less likely to change residences than prior generations.[42]

- *They are more educated*: As of 2017, 40 percent of Millennial workers aged 25 to 29 had at least a bachelor's degree, continuing a trend of increasing education seen across generational cohorts since the Silent Generation (people born from 1928 to 1945). This

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[38] Matthew Colford and Alec J. Sugarman, "Millennials and the Military," Hoover Institution, Aug. 2, 2016.

[39] David Dixon, "Millennials: Understanding this Generation and the Military," Association of the United States Army, Feb. 16, 2016.

[40] Bruce Drake, "6 New Findings about Millennials," Pew Research Center, Mar. 7, 2014, https://www.pewresearch.org/fact-tank/2014/03/07/6-new-findings-about-millennials; and Kristen Bialik and Richard Fry, "Millennial Life: How Young Adulthood Today Compares with Prior Generations," Pew Research Center, Feb. 14, 2019, https://www.pewresearch.org/social-trends/2019/02/14/millennial-life-how-young-adulthood-today-compares-with-prior-generations-2.

[41] Michael Lipka, "Millennials Increasingly Are Driving Growth of 'Nones,'" Pew Research Center, May 12, 2015, https://www.pewresearch.org/fact-tank/2015/05/12/millennials-increasingly-are-driving-growth-of-nones.

[42] Richard Fry, "It's Becoming More Common for Young Adults to Live at Home—and for Longer Stretches," Pew Research Center, May 5, 2017, https://www.pewresearch.org/fact-tank/2017/05/05/its-becoming-more-common-for-young-adults-to-live-at-home-and-for-longer-stretches.

trend of increasing education was especially pronounced for Millennial women relative to their generational predecessors.[43]

Popular narrative

Research on Millennials by analysts Howe and Strauss in the early 2000s identified seven "core traits" that were popularly associated with this cohort (quoted):[44]

- *Special:* Millennials, as a collective, believe that they are vital to the Nation and their parents' sense of purpose.

- *Sheltered*: They have been the focus of the most sweeping child and youth-protection movements in American history.

- *Confident*: Millennials are trusting, optimistic, and connected to their parents and the future.

- *Team Oriented*: Strong team instincts and tight peer bonds are their norm.

- *Conventional*: Conservative in their behaviors and values, they bring a modern twist to traditional social rules and standards.

- *Pressured*: With a sense of "trophy kid" pressure, they feel responsible to study hard, avoid personal risks, and excel.

- *Achieving*: As a generation focused on high accountability and school achievement standards, Millennials are the best-educated young adults in US history.

Another popular conception of Millennials is that they grew up with digital technology—such as personal computers, email, and cell phones—and are very comfortable with it as a result. They are thus often referred to as "digital natives," as opposed to their Gen X predecessors who are often described as "digital immigrants."[45] As with many generational generalizations, however, there are variations within the theme: more detailed examinations of Millennials'

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[43] Nikki Graf, "Today's Young Workers Are More Likely Than Ever to Have a Bachelor's Degree," Pew Research Center, May 16, 2017, https://www.pewresearch.org/fact-tank/2017/05/16/todays-young-workers-are-more-likely-than-ever-to-have-a-bachelors-degree.

[44] Quoted from Darlene E. Stafford and Henry S. Griffis, *A Review of Millennial Generation Characteristics and Military Workforce Implications*, CNA CRM D0018211.A1/Final, May 2008, who adapted the list from Neil Howe and William Strauss, *Millennials Go to College*, 2nd ed. Life Course Associates, 2007.

[45] Al Boyer and Cole Livieratos, "The Changing Character of Followers: Generational Dynamics, Technology, and the Future of Army Leadership," Modern War Institute, June 16, 2022, available at: https://mwi.usma.edu/the-changing-character-of-followers-generational-dynamics-technology-and-the-future-of-army-leadership.

experience with technology have found disparities among cohort members of different ethnic, racial, and economic backgrounds.[46]

In the next two sections, we summarize rigorous, empirical research that confirms some, but not all, of these generalizations of Millennials. We present relevant findings from five peer-reviewed articles that describe the characteristics of Millennial workers and their desires from organizations and leaders. Two of these articles include time-lag study designs in which researchers used survey data from different periods to understand changing attitudes and desires of young workers over time.[47] The other three studies are extensively sourced literature reviews that include both time-lag and cross-sectional research.[48] Taken together, these five articles are the most rigorous and consistent studies we found that include cohort analysis or clearly articulate findings that are the result of cross-sectional research.

We organize the major findings from these articles into two categories: (1) traits and attitudes that affect work behavior in general and (2) traits and attitudes specifically related to leadership expectations. Although the reports that we examined mostly find *similarities* in traits and attitudes across cohorts, the focus of this study was to identify substantive *differences* that might matter for the future of SOF leadership.[49] We therefore focus the following discussion on identified differences, while recognizing that Baby Boomers, Gen Xers, and Millennials have far more similarities than differences.

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[46] Stafford and Griffis, *A Review of Millennial Generation Characteristics and Military Workforce Implications*, pp. 43-46.

[47] Jean M. Twenge and Stacy M. Campbell, "Generational Differences in Psychological Traits and Their Impact on the Workplace," *Journal of Managerial Psychology* 23, no. 8 (2008): 862-877 and Jean M. Twenge, W. Keith Campbell, and Elise C. Freeman, "Generational Differences in Young Adults' Life Goals, Concern for Others, and Civic Orientation, 1966-2009," *Journal of Personality and Social Psychology* 102, no. 5 (2012): 1045-1062.

[48] Jean M. Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes," *Journal of Business and Psychology* 25 (2010): 201-210; Marcie Zaharee, Tristan Lipkie, Stewart K. Mehlman, and Susan K. Neylon, "Recruitment and Retention of Early-Career Technical Talent: What Young Employees Want from Employers," *Research-Technology Management* 61, no. 5 (2018): 51-61; and Galdames and Guihen, "Millennials and Leadership."

[49] A similar conclusion was drawn by a group of military historians who wrote that for the US Army, "every generation of junior officers has a sense of disconnect from the older generation, a feeling that their elders 'don't get it.'" See: Edward Cox, Kent W. Park, Rachel M. Sondheimer, and Isaiah Wilson, "Growing Military Professionalism Across Generations," *Military Review*, Sept. 2011, pp. 34-42, https://www.armyupress.army.mil/Portals/7/military-review/Archives/English/MilitaryReview_20110930PofA_art001.pdf.

Traits and attitudes of Millennials that affect work behavior

This section describes traits and attitudes of Millennial adults in the workforce that can affect their workplace behavior and outcomes, such as job satisfaction, commitment, and turnover. According to the sources we examined, Millennials in the workforce today:

- **Emphasize extrinsic rewards:** Extrinsic rewards—such as money, retirement benefits, and paid time off—are viewed as higher priorities for Millennials than for most previous generations,[50] with one interesting exception: members of Gen X appear to value these aspects of work even more than Millennials.[51]

- **Are no more intrinsically motivated than in the past:** Contrary to popular belief, Millennials do not appear to be more motivated to find purpose and meaning at work than previous generations.[52] This finding does not imply that they derive no meaning or purpose from their work, just that they do not take *more* meaning and purpose from it than past generations. That said, research does find that work is less central to Millennials' identity as compared to previous generations.[53]

- **Place increased value on leisure time and a flexible work schedule:** Extensive literature reviews (of cross-sectional and time-lag studies) demonstrate that Millennials emphasize actively trying to achieve work-life balance, desire flexible working hours, and value the ability to work remotely.[54] However, both members of Gen X and Millennials value leisure time more than previous generations.[55]

- **Score higher on individualistic traits (e.g., self-esteem and narcissism) than prior generations:** One robust time-lag study demonstrated a significant change in average scores of Millennials on established self-esteem and narcissism scales, though this

[50] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes"; Zaharee, Lipkie, Mehlman, and Neylon, "Recruitment and Retention of Early-Career Technical Talent"; and Twenge, Campbell, and Freeman, "Generational Differences in Young Adults' Life Goals, Concern for Others, and Civic Orientation."

[51] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes."

[52] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes" and Twenge, Campbell, and Freeman, "Generational Differences in Young Adults' Life Goals, Concern for Others, and Civic Orientation."

[53] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes."

[54] Galdames and Guihen, "Millennials and Leadership" and Zaharee, Lipkie, Mehlman, and Neylon, "Recruitment and Retention of Early-Career Technical Talent."

[55] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes."

appears to be a multi-generational trend.[56] In the mid-1990s, for example, the average college-aged man had higher self-esteem scores than 86 percent of the college-aged men in 1968. A similar trend was reported for college women. Further, the average college student in 2006 scored higher on a narcissism scale than 65 percent of college students in the early 1980s. The implications of higher self-esteem and narcissism traits in the workforce are wide-ranging and include overconfidence, a willingness and desire to speak directly to those in positions of power, discomfort with criticism, expectations of early promotion, and a win-at-all-costs mentality.[57] This trend can also result in a decreased value for employers of employee self-appraisals of performance (i.e., due to an inflated view of their own performance).[58]

- **Have a higher external locus of control:** Compared to prior generations, Millennials reported a noticeably higher external locus of control, meaning they attribute the causes of events to the environment or other people (rather than themselves).[59] This trait can result in diffused responsibility and accountability on work projects, as well as a preference for working in a collaborative environment (because there is shared accountability among collaborators).[60]

- **Have a higher tendency to job-hop than previous generations:** Related to the other traits and attitudes described in this section, early career Millennials were more interested in quicker rotations through projects and roles. They were also more likely than their predecessors to leave a job or organization.[61] Some researchers have connected this tendency to lower average conformity scores in recent generational cohorts: concern with impressions and social conformity steadily dropped between the 1950s and the 1970s and have stabilized at a historic low since the 1980s.[62] Implications of this shift have been decreases in the formality of workplace attire and in expectations of staying with one organization for the majority of one's career.

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[56] Twenge, Campbell, and Freeman, "Generational Differences in Young Adults' Life Goals, Concern for Others, and Civic Orientation."

[57] Ibid.

[58] Ibid.

[59] Ibid.

[60] Ibid.

[61] Galdames and Guihen, "Millennials and Leadership" and Zaharee, Lipkie, Mehlman, and Neylon, "Recruitment and Retention of Early-Career Technical Talent."

[62] Twenge, Campbell, and Freeman, "Generational Differences in Young Adults' Life Goals, Concern for Others, and Civic Orientation."

However, it is important to note that Millennials have been found to be *more likely* than their predecessors to stay with a job or organization if they have a high degree of job satisfaction, recognition, and career development.[63]

Traits and attitudes of Millennials related to leadership expectations

This section describes traits and attitudes of young adults in the workforce that can be uniquely influenced by leaders and their behavior. According to the sources we reviewed, Millennials in the workforce today:

- **Desire continuous feedback and guidance from their supervisors:** Contrary to the preferences of the Gen X workforce, some studies have found that Millennials desire more feedback from their supervisors.[64] However, one comprehensive literature review warns that this finding might be confounded by cross-sectional effects, noting that *early career professionals* in general tend to desire more continuous feedback than those at later stages of their career.[65]

- **Desire multifaceted professional development plans and supervisors who engage their employees about their goals:** Note that though this trait has been found to be true of Millennials, researchers have pointed out that the same has been true for prior generations as well.[66]

- **Value transparency and authenticity:** Two of the studies we examined found that Millennials desire these traits from their leaders, and if these expectations are not met, members of this generation are unlikely to stay in an organization.[67]

The traits and attitudes listed above are the result of extensive and methodologically rigorous time-lag studies or extensively sourced literature reviews. We found one additional study that contained interesting findings, though it was reliant on a sample of about 300 college students and was not nearly as robust.

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[63] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes."

[64] Twenge, "A Review of the Empirical Evidence on Generational Differences in Work Attitudes" and Galdames and Guihen, "Millennials and Leadership."

[65] Zaharee, Lipkie, Mehlman, and Neylon, "Recruitment and Retention of Early-Career Technical Talent."

[66] Ibid.

[67] Zaharee, Lipkie, Mehlman, and Neylon, "Recruitment and Retention of Early-Career Technical Talent" and Twenge, Campbell, and Freeman, "Generational Differences in Young Adults' Life Goals, Concern for Others, and Civic Orientation."

In their study, Omilion-Hodges and Sugg directly asked a cadre of Millennials what they expected from their leader's communication styles.[68] The authors subsequently grouped those responses into five managerial archetypes (i.e., set of common defining characteristics). These archetypes are listed in Table 6. As the table shows, a large majority of respondents preferred a *mentor* type relationship with leaders, while majorities also described aspects of *teacher* and *manager* type relationships as being desirable. Respondents generally did not describe aspects of the *friend* or *gatekeeper* types of leadership as desirable.

Table 6.   Five most common desired managerial archetypes from a study of Millennial college students

Archetype	Conceptualization	Defining communication behaviors	% desiring aspects of the archetype
Mentor	An empathetic advocate, professional and personal guide	Individualized communication, adept listener, personalized attention, frequent check-ins	90
Teacher	A traditional educator who provides role-testing episodes, clear feedback, and opportunities for redemption and growth	Direct communication, frequent use of clear incentives and repercussions	75
Manager	A proxy for organizational leadership who takes a transactional approach to leader-follower relationships	Communicates when necessary, delegates tasks, disseminates organizational policies or punishments	60
Friend	An approachable, peer-like manager	Open, frequent communication, more latitude in terms of workplace decisions, sharing of professional and personal information	20
Gatekeeper	A high-status actor who is positioned to either advocate for or against an employee	Though this manager could strategically withhold information or engage in other communicative behaviors to stunt an employee's success, typically this manager is detail oriented with a focus on the macro-organizational level	10

Source: Omilion-Hodges and Sugg, "Millennials' Views and Expectations Regarding the Communicative and Relational Behaviors of Leaders."
Note: The percentage of the sample describing aspects of the archetypes is based on the original sample endorsing characteristics that were then grouped into the five archetypes. The participants did not endorse the archetypes directly.

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[68] Omilion-Hodges and Sugg, "Millennials' Views and Expectations Regarding the Communicative and Relational Behaviors of Leaders."

The next section summarizes less rigorous, but nonetheless interesting, publications that address to what extent the preferences of Millennials in the workplace—and the differences of these to other generational cohorts—apply to the military.

Application of research on traits and attitudes of Millennials to the military

In addition to peer-reviewed research on traits, attitudes, and leadership expectations of Millennials in the civilian workforce, we explored the literature to identify potential applications of these concepts to the population of Millennials in the military. The military theses and articles discussed below drew from many of the same sources discussed above, so they form a natural extension of our discussion thus far. None of these sources generated new data (e.g., by surveying young adults in the military) to identify their findings and recommendations. Rather, their authors employed their subject matter expertise to build on the academic literature and offer thoughts for what leaders could do—in light of the available research—to improve leadership, recruitment, employment, and retention of young adults in the military.

In a military thesis for the National Defense University, Army Colonel Stephen Dorris asserts that "a gap exists within the leadership doctrine of all four military services to adequately understand and inform leaders on the best methods to effectively lead Millennial military officers."[69] Based on reviewing a mix of scholarly and popular literature on characteristics of Millennials—and their differences from prior generations—Dorris concludes that military leaders should focus on what their institutions "are offering Millennials by way of leadership, opportunities to excel and grow, team work, and the combining of organizational objectives with those of Millennials to meet their personal and professional goals and desire to attain a work-life balance."[70]

In particular, Dorris cites Transformational Leadership Theory as holding significant promise for senior military officers in their approach to leading Millennials. The four central tenets of transformational leadership are as follows:[71]

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[69] Stephen D. Dorris, "Leading and Retaining Millennial Officers in the US Armed Forces," Joint Forces Staff College, National Defense University, 2018, p. 3.

[70] Ibid., p. 39.

[71] J.M. Burns, *Leadership* (New York, NY, Harper and Row: 1978) and B.M. Bass and R.E. Riggio, *Transformational Leadership (2nd ed.)* (Psychology Press: 2005).

- *Idealized influence*: Leaders act as strong role models for followers; leaders authentically depict ethical behavior and the organization's values; followers then buy into the values espoused by the leader and work for the collective interest.

- *Inspirational motivation*: Leaders articulate a vision that is appealing and inspiring to followers; leaders communicate confidence and optimism despite challenges; leaders convey purpose in the organization's actions.

- *Intellectual stimulation*: Leaders challenge assumptions, take prudent risk, and solicit input from their followers; leaders provide followers with an opportunity to be involved and question their own assumptions.

- *Individualized consideration*: Leaders recognize and employ the skills and contributions of individual team members; leaders provide empathy, support, and respectful communication.

Dorris states that the application of these principles will enable military leaders to ensure that the goals and culture of their organizations align with the seven characteristics of Millennials cited earlier (special, sheltered, confident, team oriented, conventional, pressured, and achieving).[72] He also recommends that the military explore greater use of 360-degree assessment and feedback tools, as well as reverse, anonymous, and group mentoring models as a means of addressing Millennials' desires to receive more and continuous feedback on their performance and to be personally invested in and developed.[73] And he concludes that military leaders should instill and model work-life balance for subordinates (aspects of *idealized influence*) and build time to reflect, as well as personally and professionally grow, throughout their career (aspects of *individualized consideration* and *intellectual stimulation*).[74]

Dorris emphasizes transformational leadership as the best approach for Millennials in the military, and this emphasis was echoed by a cadre of thesis authors from the Air War College that spanned the Army, Air Force, Navy, Marine Corps, and Army National Guard. One of those authors, Army National Guard Lieutenant Colonel Joanne MacGregor, does not describe her recommendations in terms of transformational leadership, but each of the following recommendations that she makes are consistent with at least one tenet of transformational leadership (included in parentheses for ease of reference):[75]

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[72] Dorris, "Leading and Retaining Millennial Officers in the US Armed Forces," p. 45.

[73] Ibid., p. 46.

[74] Ibid.

[75] Joanne MacGregor, "Leading Millennials: Motivating and Leading Millennial Service Members," Air War College, Feb. 20, 2016.

- *Improve communication*: Listen and create open dialog with subordinates and increase the use of technology-aided communication (*individualized consideration* and *intellectual stimulation*)

- *Provide motivation*: Provide an opportunity to be part of something greater (*inspirational motivation*); put subordinates in positions where they can grow and stretch (*individualized consideration/intellectual stimulation*)

- *Teach discipline and hold subordinates accountable*: Show them what right looks like; demonstrate professional standards (*idealized influence*) and hold them accountable for that standard of conduct; if coached properly, subordinates can learn from discipline and grow (*individualized consideration*)

- *Provide individually tailored professional development opportunities*: Subordinates will seek opportunities for growth and continual learning; clearly indicate expected performance and reward systems (*intellectual stimulation* and *individualized consideration*)

MacGregor concludes by emphasizing mentoring and providing discipline and critical feedback in the context of opportunities for personal and professional growth as being among the most important things military leaders can do for Millennial servicemembers.[76] In his thesis, Marine Corps Major David Fitzsimmons similarly identifies communication and motivation as two critical challenges of leading Millennials and offers similar recommendations as MacGregor's first two bullets above.[77]

Navy Commander Christopher Sledge concurs that focusing on transformational leadership is a beneficial approach to Millennials, citing the tendency of the latter to have a "much more familiar relationship with authority figures" and a "much different view of the relationship between leaders and followers than previous generations"—one more akin to a "conversation" and a "flatter" relationship with authorities.[78] Sledge recommends that leaders focus less on the use of their "positional" power to lead and influence Millennial servicemembers and more on the use of their "personal" power to motivate them through coaching and mentoring.[79] He also recommends that leaders not employ formal mentoring programs, which conflict with

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[76] Ibid., p. 20.

[77] David Fitzsimmons, "Generational Leadership in the United States Marine Corps," USMC Command and Staff College, Mar. 9, 2012.

[78] Christopher L. Sledge, "Influence, Power, and Authority: Using Millennials' Views to Shape Leadership Practices," Air War College, Feb. 16, 2016, pp. 12-13.

[79] Ibid., p. 14.

Millennials' desire for more informal and networked relationships, but instead promote a variety of mentoring relationships, including developmental networks and "mentoring constellations." Perhaps most notably for SOF, Sledge recommends the use of mission command to empower and entrust Millennials to do their jobs.[80]

Marine Lieutenant Colonel Stacey Taylor concurs with the use of transformational leadership principles within the Marine Corps, stating that by employing its elements, "Marine leaders have unlimited opportunities to instill the values of honor, courage, and commitment within Millennials and make them the Marines the Corps and nation needs them to be."[81] She goes on to recommend that Marine leaders "ensure those in command positions at all levels are trained to maintain a delicate balance between empowering Millennials and providing them with direction, discipline, and cohesion to act with the right sense of mission."[82]

Air Force Lieutenant Colonel Steve Boatright cites similar traits as being important for leading Millennials in his thesis, though he also suggests that a transformational leadership style is valid for any generation.[83] Further, he argues that generational distinctions within the military are less significant than the civilian population since the military recruits heavily from certain regions (e.g., the South) and a large fraction of new recruits come from extant military families. These aspects, in his view, render Millennials in the military as an unrepresentative sample of American Millennials in general and more like preceding generations of American servicemembers than the general population.[84]

Some of the ideas offered by these thesis writers have been seconded by other military authors. For example, one Army major echoes Sledge's emphasis on the use of personal versus positional power to motivate Millennials.[85] One Army colonel offers three main ideas for successfully leading Millennials that echo some of the authors above:[86]

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[80] Ibid., p. 16.

[81] Stacey L. Taylor, "Reshaping Millennials as Future Leaders of the Marine Corps," Air War College, Feb. 4, 2016, pp. 16-17.

[82] Ibid.

[83] Steve Boatright, "The Millennial Generation and the Military," Air War College, Feb. 11, 2016.

[84] Ibid.

[85] Keith Humbard, "Leading Millennials in the Military," *Small Wars Journal*, May 14, 2017.

[86] Robert Carr, "How the US Army Recruits and Retains Millennials," Kellogg Insight, May 5, 2017, https://insight.kellogg.northwestern.edu/article/how-the-us-army-recruits-and-retains-millennials.

- *Recognize ambitions and set expectations*: Harness Millennials' high confidence and levels of ambition by giving them responsibility, while setting their expectations of promotion pathways within the military.

- *Communicate on their level*: Meet Millennials where they work, see how they perform, and listen to their ideas. Understand that Millennials' questions are not meant to challenge leaders' authority but the status quo of how things have always been done.

- *Give them room to innovate*: Millennials are not afraid to offer ideas for how they think problems should be solved. Leaders should not dismiss them based on lack of seniority or experience but seek their inputs and use those that make sense.

Two Air Force colonels who wrote about their experience leading Millennials as commander and vice commander of an air wing call for embracing Millennials' suspicion of authority, preference for flat communications structures, desire for continuous performance feedback, and need to know the "why" behind orders. Specifically, they cite effectively employing the mantra "respect the leader but challenge the approach" with younger members of their squadron.[87] The two colonels also cite several concrete examples in which Millennials generated innovative and effective solutions to problems. To get to that point, the colonels "gathered key millennial leaders from throughout the wing into an ad hoc idea-generating team, provided broad guidance and intent, gave them a deadline, and let them brainstorm, both together in the group and as individuals." As the colonels assessed, "This approach produced excellent results."[88]

Generation Z

This section discusses Generation Z—Americans who are currently roughly between 10 and 25 years old. As with prior generations, it is currently difficult to discern how different Gen Z is from its predecessors, partly because of the general dearth of empirical studies on this cohort. Though members of Generation Z lived through the Great Recession as children and experienced the COVID-19 pandemic as teenagers or young adults, many of the seminal events for this generation—the "imprinting events and circumstances that occur while [generational members] are in their twenties, such as economic conditions, times of war and peace, and political/social leaders"[89]—have not yet occurred.

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[87] S. Clinton Hinote and Timothy J. Sundvall, "Leading Millennials," *Air and Space Power Journal* (Jan.-Feb. 2015).

[88] Ibid.

[89] Stafford and Griffis, *A Review of Millennial Generation Characteristics and Military Workforce Implications*, p. 15.

Nonetheless, some factual characteristics are known about this generation. And as was the case for Millennials, a popular narrative surrounding Gen Z has also emerged. In this section, we first address the former and then the latter, acknowledging that parts of the popular narrative are anecdotal and unlikely to be completely accurate. We then summarize a mix of research and anecdotal evidence pertaining to how the characteristics of Generation Z relate to work, leadership, and the military.

Characteristics

According to the Pew Research Center, the following are characteristics of Generation Z that stem from the center's polls from across different cohorts:[90]

- *The most diverse generation*: Gen Z is the leading edge of America's shift toward an increasingly diverse nation. Only 52 percent of Gen Zers are White, while 25 percent are Hispanic, 14 percent are Black, 6 percent are Asian, and 5 percent claim some other nonwhite racial composition. The US Census Bureau projects that the Gen Z cohort will become majority nonwhite by 2026.

- *The most educated generation*: High school dropout rates are lower for Gen Z than prior generations, and a higher proportion of 18- to 21-year-old Gen Z members are in college than was the case for Millennials or Gen X at the same stage of those cohorts. Perhaps related to this trend, members of Gen Z are also less likely to have worked traditional jobs as teens and young adults (though many of them have found ways to earn money through online activities).

- *Similar outlook on major issues as Millennials*: Members of Gen Z and Millennials seem to have similar views on major issues facing America—whether on the role of government, race relations, changes to families and society in general, gender fluidity, or the role of the US in the world.

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[90] Kim Parker and Ruth Igielnik, "On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Gen Z So Far," Pew Research Center, May 14, 2020, https://www.pewresearch.org/social-trends/2020/05/14/on-the-cusp-of-adulthood-and-facing-an-uncertain-future-what-we-know-about-gen-z-so-far-2.

Popular narrative

More popular conceptions of members of Gen Z include the following:[91]

- *They are "digital natives"*: Like Millennials, who grew up with access to modern technology, members of Gen Z have only ever known a world of smart phones, social media, and instant internet access. For example, in one recent survey, 45 percent of teenagers reported being online "almost constantly."[92] As a result, Gen Z members are extremely savvy online and often spend time cultivating a "personal brand" on the internet. This also leads to trends such as fewer members getting driver's licenses because they have ready access to ride-sharing apps such as Uber and Lyft.

- *They are the first "post–9/11" generation*: For Gen Z members, the attacks of 9/11 occurred either when they were too young to remember or before they were born. They have lived with the threat of international terrorism and the global war on terror their entire lives, which has made these things permanent features of their worldview.

- *They are pragmatic and financially conservative*: Having grown up watching their parents deal with the consequences of the Great Recession—and having experienced rates of poverty that reached nearly one in four children[93]—Gen Z members are driven by pragmatism and a desire for stability that comes from having a stable job, living within their means, and making savvy investments. They recognize that they are unlikely to have as secure a financial future as prior generations, and they are more inclined to pursue a stable, well-paying career than chase dreams of becoming rich.

- *They are accepting and empathetic*: Many members of Gen Z grew up after developments such as the repeal of "Don't Ask, Don't Tell" and the legalization of marriage between same-sex couples. This, combined with Gen Z being the most diverse

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[91] "What Are the Core Characteristics of Generation Z?" Annie E. Casey Foundation, Apr. 14, 2021, https://www.aecf.org/blog/what-are-the-core-characteristics-of-generation-z; "7 Unique Characteristics of Generation Z," Oxford Royale, date unknown, https://www.oxford-royale.com/articles/7-unique-characteristics-generation-z; and Peter Revay, Holly Barnes, Bob Sheldon, and Brianne Brown, "Young American Population Study Phase II: Final Report," US Marine Corps Operations Analysis Directorate, Feb. 25, 2021.

[92] A. Perrin and M. Kumar, "About Three-in-Ten US Adults Say They Are 'Almost Constantly' Online," Pew Research Center, July 2019, https://www.pewresearch.org/fact-tank/2019/07/25/americans-going-online-almost-constantly; and Monica Anderson and Jingjing Jiang, "Teens, Social Media and Technology 2018," Pew Research Center, May 31, 2018, https://www.pewresearch.org/internet/2018/05/31/teens-social-media-technology-2018/.

[93] "What the Statistics Say about Generation Z," Annie E. Casey Foundation, Nov. 13, 2020, https://www.aecf.org/blog/generation-z-statistics.

generation yet, leads members of Gen Z to "think that being socially liberal goes without saying and [they] are often horrified that anyone could think otherwise."[94]

- *They have mental health challenges*: Gen Z has sometimes been referred to as "the loneliest generation" because of the vast amount of time they spend on screens and with digital relationships as opposed to personal ones. Gen Zers also look at the state of the US today and see increasing trends toward divisiveness and discord, which increases their levels of experienced stress. For example, according to a poll by the American Psychological Association, 75 percent of Gen Z respondents said that mass shootings were a significant source of stress. The same poll found that just over a quarter (27 percent) of Gen Zers reported their mental health as fair or poor, roughly double the rate of Millennial and Gen X respondents.[95]

- *They are more health conscious*: One positive aspect of Gen Zers is that they are more willing to acknowledge mental health issues and seek treatment for them. They are also more physically health conscious—they smoke and drink less than prior generations, and they tend to be healthier eaters as well. A recent Joint Advertising and Marketing and Research Studies (JAMRS) presentation concluded that they are seeing a shift in today's youth away from "work values" to "life values," in which Gen Zers are more actively taking a whole-of-life attitude in which their career choices are only a part.[96]

- *They are shrewd consumers*: The pragmatism and digital savvy of Gen Z members makes them less susceptible to celebrity endorsements and marketing campaigns. Rather, members of this cohort rely more on recommendations from members of their digital network, along with ample shopping around (made easy by the accessibility of information online), before making purchases. They also value brands and organizations that align with their own personal beliefs, whether political or otherwise.

- *They value privacy and personalization*: In what may seem like a contradiction, members of Gen Z value personal privacy and gravitate toward social media applications that provide tools to tailor their digital interactions (e.g., via settings that control who can see various posts or types of information). However, Gen Zers have also grown up knowing that social media and other companies are tracking their every move online, which they have accepted as the price for personalized service. They also

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[94] "7 Unique Characteristics of Generation Z," Oxford Royale.

[95] Sophie Bethune, "Gen Z More Likely to Report Mental Health Concerns," American Psychological Association, Jan. 2019, https://www.apa.org/monitor/2019/01/gen-z.

[96] Jeremy T. Hall, "Values of Today's Youth Market: From Work/Life Balance to Work/Life Alignment," Office of People Analytics, Apr. 2022.

expect a similar degree of personalization from their employers or schools and are less inclined to work in teams than Millennials.[97]

Overall, many of these characteristics and narrative descriptions of Gen Z are furthering those that were used to describe Millennials (e.g., more diverse, more educated, more digitally savvy). The major differences between Millennials and members of Gen Z appear to be the latter's desire for increasing personalization (e.g., focus on "personal brand," desire for organizations to cater to them individually, decreased loyalty to any specific company or brand), higher numbers of reported mental health issues, and more pragmatic and empathetic outlooks on life.

Application of traits and attitudes of Generation Z to work, leadership, and the military

As described by one researcher at Stanford, who conducted interviews and focus groups with over 2,000 members of Gen Z and analyzed an online repository of over 70 million items of spoken and written language from this cohort:

> *A typical Gen Zer is a self-driver who deeply cares about others, strives for a diverse community, is highly collaborative and social, values flexibility, relevance, authenticity and non-hierarchical leadership, and, while dismayed about inherited issues like climate change, has a pragmatic attitude about the work that has to be done to address those issues.* [98]

In providing advice to other generations in working with members of Gen Z, the researcher notes that they are "used to working collaboratively and flexibly, with an eye to being efficient in getting the job done."[99] She notes that Gen Zers are even more likely to question rules and authority, including sometimes questioning why leaders are needed at all if a group of people can accomplish a shared mission via online collaboration that maximizes the utility of diverse skillsets.[100]

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[97] Christopher A. Miller, "Preparing the Millennial Generation for Leadership," *NCO Journal* (Sept. 2019): 1-4.

[98] Melissa De Witte, "Gen Z Are Not 'Coddled.' They Are Highly Collaborative, Self-Reliant and Pragmatic, According to New Stanford-Affiliated Research," Jan. 3, 2022, https://news.stanford.edu/2022/01/03/know-gen-z.

[99] Ibid.

[100] Ibid.

In one literature review on advice for getting the most out of members of Gen Z, the author suggests that employers "detox your workplace of one-size-fits-all solutions" because the highly individualistic nature of Gen Zers means that they desire customized and flexible work experiences. The relatively progressive views of Gen Z members and their belief that "doing good" is at least as important as "doing well" means that employers will also need to think about their stance on important moral and ethical issues, such as aspects of sustainability (e.g., carbon footprint).[101] These themes have been echoed in leading business journals.[102] For example, the author of one article seconds the need for organizations to be values-based to appeal to Gen Zers, but focuses centrally on the need for inclusivity and for leaders to be diverse and representative: "Companies can't get away with just paying these issues lip service with [Generation Z]."[103]

More specific to the military, K.C. Reid, writing about her experience teaching Gen Z Marines (who, at the time of her writing in 2018, already constituted 15 percent of active duty enlisted Marines), cites several aspects of this generation worth noting for the military.[104] They want instant access to all things whenever they need it, in the format that works best for them (e.g., websites, apps, in person). They expect to be taught by, and have ready access to, true experts in their field of study. They want their leaders to be authentic and are skeptical of institutional information as propaganda. They are tethered to technology (e.g., smart phones) and are intolerant of anything they view as wasting their time (including talking on the phone versus texting or direct messaging[105]). They want personal relevance to be apparent in what they do, asking not just "why?" but also "why does this matter to me?" And they have higher numbers of reported mental health issues, with higher rates of depression and suicide than Millennials.[106]

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[101] Teresa Bridges, "5 Ways the Workplace Needs to Change to Get the Most Out of Generation Z," date unknown, https://professionals.wrha.mb.ca/old/education/files/5Ways.pdf.

[102] Donna Fuscaldo, "Managing Gen Z in the Workplace," *Business News Daily*, Dec. 1, 2021, https://www.businessnewsdaily.com/15873-managing-gen-z.html; and Katie Evans-Reber, "How to Meet Gen Z's Workplace Expectations," *Forbes*, Nov. 10, 2021, https://www.forbes.com/sites/forbeshumanresourcescouncil/2021/11/10/how-to-meet-gen-zs-workplace-expectations/?sh=7509662a74ff.

[103] Fuscaldo, "Managing Gen Z in the Workplace."

[104] K.C. Reid, "How the Network Generation Is Changing the Millennial Military," War on the Rocks, Mar. 20, 2018, https://warontherocks.com/2018/03/how-the-network-generation-is-changing-the-millennial-military.

[105] Dawn Janssen and Stephen Carradini, "Generation Z Workplace Communication Habits and Expectations," *IEEE Transactions on Professional Communication* 64, no. 2 (June 2021): 137-153.

[106] Ibid.

These observations are echoed by internal Marine Corps interviews with drill instructors,[107] and by two authors from the US Military Academy who write that Gen Z cadets "describe themselves as technologically dependent, fragile, depressed, and unfocused, but also more tech savvy, socially aware, creative, and tolerant than millennials or Gen X."[108]

To lead this cohort, Reid suggests the following:[109]

- *Lead with meaning*: Focus on the personal significance of any message to the Gen Z audience and ensure it is communicated through all available channels. Be empathetic.

- *Walk the walk*: Demonstrate expertise in messaging. Live preached values and act publicly on feedback from Gen Z audiences.

- *Provide the right source*: Leverage Gen Z members to speak to the ranks by "bringing in the sergeant, rather than the sergeant major."

- *Connect, both online and off*: Encourage and, if need be, force Gen Z members to build personal, and not just digital, connections with their peers and leaders. Restricting the use of devices in certain circumstances may be required.

- *Meet them where they are*: Be on the lookout for signs of mental distress or mental health issues. Make Gen Z members aware of mental health and resiliency resources available to them.

In closing, Reid identifies trustworthiness, resilience, empathy, and personal connectedness as being the most important traits for leading members of Gen Z.[110] A Marine Corps study advocates for themes of belonging and acceptance, as well as efforts to increase resiliency, in its Gen Z recruiting efforts.[111] And one Army non-commissioned officer points to increased use of mission command as being especially well-suited to leading members of Generation Z.[112]

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[107] Revay, Barnes, Sheldon, and Brown, "Young American Population Study Phase II."

[108] Al Boyer and Cole Livieratos, "The Changing Character of Followers: Generational Dynamics, Technology, and the Future of Army Leadership," Modern War Institute at West Point, June 16, 2022, https://mwi.usma.edu/the-changing-character-of-followers-generational-dynamics-technology-and-the-future-of-army-leadership.

[109] Reid, "How the Network Generation Is Changing the Millennial Military."

[110] Ibid.

[111] Revay, Barnes, Sheldon, and Brown, "Young American Population Study Phase II."

[112] Miller, "Preparing the Millennial Generation for Leadership."

Leadership Traits and the Future Operating Environment

In this section, we discuss what a variety of strategists, planners, researchers, and thinkers have said about the traits required of military leaders to successfully lead operations on the future battlefield.

As part of a series of articles on this topic, US Army strategist Cole Livieratos argues that though the nature of war remains unchanged, the character of war has evolved over the past century from being complicated to being complex. He draws a distinction in these terms using the Cynefin framework, which describes *complicated* contexts as having well-defined cause-and-effect relationships between key variables (albeit with relationships that are more numerous and difficult to discover than in *simple* contexts). It describes *complex* contexts as adaptive in that the "variables and interactions between them are constantly changing, making it difficult even for experts to discern patterns."[113]

Livieratos goes on to argue that:

> *Complex contexts cannot be solved; they can only be managed. In a context with variables and relationships that are constantly shifting, leaders are unable to assess the situation and apply the appropriate solution. Instead, they must begin by intentionally probing the environment and conducting small, experimental actions to generate insights they can then analyze for patterns. They must have patience to allow patterns to emerge and must be flexible enough for their responses to fit emergent patterns.[114]*

Citing researchers who have studied models for dealing with such complexity, Livieratos identifies the following traits as being critical for future Army leaders: adaptability, patience, transparency, sound judgment, mental agility, empathy, interpersonal tact, innovation,

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[113] Cole Livieratos, "From Complicated to Complex: The Changing Context of War," Modern War Institute at West Point, June 14, 2022, https://mwi.usma.edu/from-complicated-to-complex-the-changing-context-of-war.

[114] Cole Livieratos, "Adapting the Mold: Preparing Leaders for Complexity," Modern War Institute at West Point, June 15, 2022, https://mwi.usma.edu/adapting-the-mold-preparing-leaders-for-complexity.

resilience, and fitness.[115] He also cites an Army survey to demonstrate that the top seven (out of thirteen) leadership traits observed by current soldiers are all unsuited to complex environments and argues that the Army needs to focus less on talking about mission command and more on implementing it.

Professor Steven Metz advances similar ideas in an essay on the future of strategic leadership.[116] Just as war has a steadfast nature, Metz argues that strategic leadership also has a steadfast nature, requiring military leaders to ensure the warfighting competency of their organizations, create effective and ethical cultures, integrate the activities of horizontal organizations, and balance future planning with current operations. But he also argues that, as the character of war changes to become more technical, faster, and more information-centric, the character of strategic leadership will also need to change. Metz argues that military leaders of the future will no longer be able to preside as stewards of the organizations they lead, making only minor modifications to them to deal with the problems of the day. Rather, leaders will need to become increasingly entrepreneurial, technically proficient, analytic, disruptive, and innovative, with an eye toward constantly reimagining and remaking their organizations to remain relevant amid a changing strategic landscape.

Authors David Barno and Nora Bensahel echo Metz's calls for military leaders to become more adaptive in their approaches to future challenges.[117] And similar ideas were advanced even earlier by Michael Matthews, an Army psychologist. Matthews argues that future Army leaders should develop an egalitarian (as opposed to authoritarian) leadership style (akin to the transformational theory of leadership discussed in the previous section), become more culturally savvy and adept at working with people of diverse backgrounds, be quickly adaptive to new technology, understand how to minimize killing or being killed, and be adroit at working with other government and non-government agencies.[118]

In 2021, the Senior Enlisted Advisor (SEA) to the Chairman of the Joint Chiefs of Staff, along with the SEAs for each of the services, published a vision document titled "Developing Enlisted Leaders for Tomorrow's Wars." In their paper, the SEAs articulate a shared objective: "the development and sustainment of flexible, versatile, and adaptable joint warfighters—

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[115] Ibid.

[116] Steven Metz, "The Future of Strategic Leadership," *Parameters* 50, no. 2 (Summer 2020): 61-67.

[117] David Barno and Nora Bensahel, "Falling into the Adaptation Gap," War on the Rocks, Sept. 29, 2020, https://warontherocks.com/2020/09/falling-into-the-adaptation-gap.

[118] Michael Matthews, "21st Century Military Leadership," *Psychology Today*, Oct. 6, 2014, https://www.psychologytoday.com/us/blog/head-strong/201410/21st-century-military-leadership.

deliberately trained, educated, and empowered leaders."[119] The SEAs further articulate a need to "create leaders that act decisively in the absence of orders."[120] To pursue that goal, the SEAs announce several changes to enlisted PME, all with the aim of developing enlisted leaders who exhibit five specific traits:[121]

- *Intellect*: Both cognitive and emotional—the ability to acquire and apply knowledge and skills. Cognitively, to think critically and thoroughly in order to provide sound and candid advice. Emotionally, having keen self-awareness with the ability to connect, empathize, and understand people and cultures.

- *Credibility*: Forged by test and trial of one's skills and validated by actions and reputation. To be a leader who is trusted, believed in, and respected.

- *Accountability*: To have an obligation and willingness to accept responsibility for one's actions. To exhibit ethical behavior and actions and expect the same from all. To be fiscally and physically accountable for resources.

- *Agility*: To be responsive, flexible, resilient, and adaptable to uncertain situations and complex problems. This encompasses both physical and mental agility.

- *Discipline*: To possess an orderly or prescribed conduct or pattern of behavior. To be steadfast in execution of duties, treatment of others, and obedience to rules, policy, and the oath of office.

Writing in *Military Review*, Army Major George Fust argues that the best way for future military leaders to attain these traits is to attend a rigorous graduate school program. After analyzing various sources of Army data, Fust concludes that the Army should expand the number of graduate school opportunities it provides to its field grade and general officers, as well as incentivize degree completion at both military and civilian graduate institutions.[122]

In considering how to develop military officials as adaptive leaders, a trio of Norwegian authors advance a model for conceptualizing and addressing the paradoxes of hierarchical versus collective leadership, and for maintaining standard operating procedures (SOPs) versus providing room for experimentation. The authors argue that leaders should think in terms of

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[119] Ramon Colon-Lopez et al., "Developing Enlisted Leaders for Tomorrow's Wars," Joint Chiefs of Staff, 2021, https://www.jcs.mil/Portals/36/Documents/Doctrine/education/ epme_tm_vision_digital.pdf?ver=dmj-ILYBhrr-6wq3JhdXog%3D%3D.

[120] Ibid.

[121] Ibid.

[122] George Fust, "Key Ingredient in Army Leader Development," *Military Review*, Jan.-Feb. 2020, https://www.armyupress.army.mil/Journals/Military-Review/English-Edition-Archives/January-February-2020/Fust-Leader-Develop.

the quadrants shown in Figure 10. For relatively simple problems (upper left quadrant), leaders can rely on known SOPs and hierarchical (or transactional) leadership styles. For crises (upper right quadrant), the authors recommend relying on known SOPs but expanding the aperture of contributions by mobilizing other people or organizations and employing collective (horizontal) leadership. For complicated problems with longer time horizons (lower left quadrant), leader-directed experiments can lead to useful innovations, but for fast-paced, complex situations requiring rapid or continuous adaptation (lower right quadrant), collective leadership of group-based approaches to experimentation and learning are required.[123]

Figure 10. Adaptive paradox framework

Source: CNA, adapted from Eetveldt, Oppelaar, and Olsthoorn, "Leadership Undefined."

The idea of evolving military leadership from a hierarchical and transactional model to one that is less rigid and more networked was explored by three Danish researchers. In the motivation for their study (which focused on whether Danish military recruits exhibited qualities of network leadership), the authors define *network-based organizations* as those that value innovation, flexibility, and horizontal command structures. Referred to as "administrative adhocracies" (as opposed to hierarchical machine bureaucracies), such organizations are characterized by "high horizontal specialization, continuous training,

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[123] Martijn W. van Eetveldt, Richard G. Oppelaar, and Peter Olsthoorn, "Leadership Undefined: The Paradoxes of Future Military Leadership," *Journal of Peace and War Studies*, ISOMA Special Edition (Oct. 2021): 42–57, https://www.norwich.edu/images/centers/pawc/jpws/jpws-2021-04-vaneetveldt-oppelaar-olsthoorn.pdf.

selective decentralization, and an organic rather than bureaucratic workflow."[124] Having as their central coordinating mechanism continuous adjustment as opposed to standardization of work, leaders of such organizations derive legitimacy not from the hierarchy or their position in it, but from their competency and ethical leadership actions. The authors acknowledge that in military contexts, hierarchical leadership will sometimes be required, and so future military leaders must become effective in both hierarchical and network-based leadership styles.

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[124] Oluf Gotzsche-Astrup, Morten Braender, and Vilhelm Stefan Holsting, "Network or Hierarchy? Personality Profiles of Future Military Leaders," *Nordic Psychology*, July 19, 2021, https://www.tandfonline.com/doi/full/10.1080/19012276.2021.1945947.

Comparative Analysis

In the previous three sections, we examined the leadership traits espoused by senior SOF leaders today, those considered by research and popular narratives to be ideal for leading Millennials and members of Generation Z, and those considered necessary for military leaders' success on future battlefields. We acknowledge that the information presented in those sections is a mix of empirical or theoretical research, well-reasoned opinion, and anecdotal narratives, which makes it difficult to qualitatively analyze and use that information to produce conclusive findings. Nonetheless, we believe it may still be helpful to SOF leaders to triangulate our summaries of these sources using the "trinity of leadership" model shown in Figure 1, with the hopes of at least identifying preliminary findings of interest to SOF. To do so, we first summarize answers to our first three research questions,[125] and we then compare the results of those summaries to answer the fourth question.

Summaries of desired leadership traits

SOF leaders

In response to our questions about the most important attributes of special operations leadership, the overall top 10 traits cited by SOF SMEs were character, creativity, flexibility, determination, being a team player, competence, humility, being a relationship builder, trustworthiness, and intelligence.

Followers

In our review of available literature on Millennials, we identified research that suggests they desire more (and more continuous) feedback on their performance, supervisors who seek to understand their goals and invest in them personally to help achieve those goals, and transparency and authenticity in their leaders—a mentor/teacher style of leadership. We also identified a cadre of military writers who argue that the tenets of transformational leadership represent the best way to lead Millennials in the military. Those tenets are idealized influence (being an ethical role model), inspirational motivation (being a motivator, having a vision,

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[125] As a reminder, the research questions were as follows: (1) What are the predominant traits associated with SOF leadership today? (2) What are the traits of leadership preferred by younger generations of Americans? and (3) What are the traits of leadership required by the future security environment?

being confident and optimistic, giving purpose), intellectual stimulation (thinking critically, taking prudent risks, listening to followers' ideas), and individualized consideration (leveraging diverse skills and backgrounds of team members, being empathetic, providing support, communicating).

In our review of available literature on Generation Z, we identified research that suggests that members of this cohort are, in some ways, extensions of the Millennial generation (e.g., increasingly diverse, increasingly educated, increasingly digitally attuned). However, research also suggests that members of Gen Z are more individualistic and personally centered, more pragmatic and empathetic, and experience higher rates of reported mental health issues than Millennials. Authors writing on how to lead members of Gen Z articulate desirable leadership traits as including flexibility, competence, relevance, authenticity, pragmatism, collaborative, individualized, progressive, ethical, providing purpose, trustworthy, resilient, empathetic, and personally connected. Authors also pointed to non-hierarchical leadership as a style that might resonate with members of Gen Z.

Context

In our review of authors' thinking on the future of military leadership, we identified a general view that battlefield leaders will need to become more comfortable dealing with complexity and unclear or unknown situations in which they must rapidly act, assess, adjust, and act again. In short, they will need to become *adaptive leaders*, exhibiting traits such as adaptability, patience, transparency, sound judgment, mental agility, empathy, interpersonal tact, innovation, resilience, fitness, entrepreneurialism, technical proficiency, analytic, disruptive, culturally savvy, collaborative, intellectual, self-aware, credible, accountable, ethical, responsive, flexible, and disciplined. Researchers espoused more networked and less hierarchical—as well as more collaborative and inclusive—approaches as being particularly important to the future of military leadership.

Comparison of traits across the leadership trinity

Table 7 lists the traits that we identified from the variety of sources we examined for each part of the SOF leadership trinity: leaders (specifically, SOF leaders), followers (Millennials and Gen Z), and context (future battlefield leaders). In creating the table, we started with the full list of traits cited by SOF SMEs in our discussions, in order of prevalence (and with synonymous terms in parentheses). We then matched terms for traits that we identified for Millennials/Gen Z and future leaders in the table's other two columns. We have highlighted in blue text those

traits that span all three elements of the trinity and in red text those elements that appeared for Millennials/Gen Z and future leaders but were not cited by the SOF SMEs we interviewed.

Table 7.   Leadership traits across the SOF leadership trinity

SOF Leaders	Millennials / Gen Z	Future Leaders
Character (Ethical, Honesty, Integrity)	Ethical	Ethical, Accountability
Creativity (Innovative, Visionary)	Visionary	Mental Agility, Innovative, Entrepreneurial
Flexibility (Adaptability, Agility, Early Adopter)	Flexibility	Flexibility, Adaptability, Responsiveness
Determination (Drive, Tenacity, Passion, Desire, Resilience, Persistence, Grit)	Resilience	Resilience
Team Player (Consistent, Predictable, Dependable, Calm)		
Competence (Ability, Knowledgeable, Professional)	Competence	Fitness, Technical Proficiency
Humility (Able to Admit Mistakes)		Self-Awareness
Relationship Builder (Diplomatic, Lateral Thinker, Communicator, Team Builder)	Listener, Inclusive, Communicator, Connected	Tactful, Culturally Savvy, Inclusive
Trustworthiness (Credibility)	Trustworthiness (Authenticity)	Credibility
Intelligent (Cognitive, Curious)		Intellectual
Problem-Solver (Critical Thinker)	Critical Thinker	Analytic
Approachability (Empathetic)	Empathetic (Supporting, Individualized)	Empathetic
Empowerment (Trusting, Mentoring)	Collaborative, Mentoring	Collaborative, Less Hierarchical
Initiative (Aggressive, Action-Oriented, Warrior, Creation Motion & Momentum)		
Independence (Comfort w/ Ambiguity)		
Risk-Taker (Courage)	Risk-Taker	Disruptive
Discipline (Frugal)		Discipline
Judgment		Judgment
Decisiveness (Confidence)	Confidence	
Maturity (Experience)		
Pragmatism (Common sense)	Pragmatism	
Dedication (Loyal)		
Commitment		
	Transparency	Transparency
	Motivational (Providing Purpose, Relevance)	
	Optimistic	
	Progressive	
		Patient

Source: CNA.

As the table shows, the top four traits cited by SOF leaders as being the most important for special operations leadership—character, creativity, flexibility, and determination—were also cited (at least, in synonymous form) as being important for members of today's younger generations and for the future of battlefield leadership. Additional leadership traits that were cited as being important to all three categories are competence, relationship builder, trustworthiness, problem-solver, approachability, empowerment, and risk-taker. These 11 traits comprise the overlapping set of leadership traits for the leadership trinity for the next 15–20 years (green circle in the center of Figure 11 on the next page). Of note for SOF is that seven of the top ten traits cited by SOF leaders are in the overlapping set of leadership traits— only team player, humility, and intelligence were not also cited for the other two categories. Even more interesting for SOF is that being a team player was not cited in either of the other two categories.

Only one leadership trait was cited by researchers and authors as being desirable for both younger generations and the future battlefield that was not also cited by SOF: transparency. Interestingly, none of our SOF SMEs identified this trait as being critical to the leadership of special operations, but when we asked active duty members what differences in leadership expectations they saw in younger members of SOF today, *transparency* and *understanding the why* were the most common themes (mentioned in almost every response).

Figure 11. SOF leadership trinity of the future

Context

Character | Relationship-bldr | Risk-taker
Creativity | Trustworthiness | Discipline
Flexibility | Intelligent | Judgment
Determination | Problem-solver | Transparency
Competence | Approachability | Patient
Self-Awareness | Empowerment

Character
Creativity
Flexibility
Determination
Competence
Relationship Builder
Trustworthiness
Problem-solver
Approachability
Empowerment
Risk-taker

Followers

Character | Empowerment
Creativity | Risk-taker
Flexibility | Decisiveness
Determination | Pragmatism
Competence | Transparency
Relationship-bldr | Motivational
Trustworthiness | Optimistic
Problem-solver | Progressive
Approachability

Leaders

Character | Empowerment
Creativity | Initiative
Flexibility | Independence
Determination | Risk-taker
Team Player | Discipline
Competence | Judgment
Humility | Decisiveness
Relationship-bldr | Maturity
Trustworthiness | Pragmatism
Intelligent | Dedication
Problem-solver | Commitment
Approachability

Source: CNA.

Findings and Recommendations

Having completed our research and comparative analysis, we now turn to discuss the findings and recommendations from our study. In keeping with our caveats thus far, we offer the thoughts in this section as preliminary and suggestive, rather than final and conclusive. We welcome other researchers to build on this work by testing our discussion through empirical, rigorous studies.

Findings

SOF do not have a single leadership philosophy

The SOF SMEs we interviewed were roughly split regarding whether they believed SOF have a single or consistent philosophy of leadership. The most prevalent philosophy cited by those who did think so was *mission command*, but this was cited by only 6 of 22 respondents.

These results rely on a small sampling of SOF leaders, and thus it is possible that SOF leaders outside of our study could articulate a singular philosophy of SOF leadership. But our results at least suggest that the opposite may be true. Two additional facts support the argument that no single philosophy of leadership is shared widely across the SOF enterprise. First, doctrine pertaining to special operations exists within each military service, but these publications do not address leadership of SOF or special operations.[126] Similarly, the joint publication for special operations does not directly address a philosophy of SOF leadership.[127] Second, special operators are professionally developed as members of both the SOF enterprise and their service—and no overarching philosophy of leadership spans the services either. For example,

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[126] "ADP 3-05: Army Special Operations," Department of the Army, July 2019, https://armypubs.army.mil/epubs/DR_pubs/DR_a/pdf/web/ARN18909_ADP%203-05%20C1%20FINAL%20WEB(2).pdf; "Air Force Doctrine Publication 3-05: Special Operations," US Air Force, Feb. 1, 2020, https://www.doctrine.af.mil/Portals/61/documents/AFDP_3-05/3-05-AFDP-SPECIAL-OPERATIONS.pdf; "MCWP 3-05: Marine Corps Special Operations," US Marine Corps, Apr. 4, 2018, https://www.marines.mil/portals/1/Publications/MCWP%203-05%20GN.pdf?ver=2019-01-15-114129-333. The Navy's doctrinal publication for special operations is restricted.

[127] "Joint Publication 3-05."

though the Army has a doctrinal publication specifically about leadership[128] and the Marine Corps has a warfighting publication titled "Leading Marines,"[129] the Air Force[130] and Navy[131] do not have similar publications, and no joint publication pertains specifically to leadership.[132]

Some overarching philosophies of special operations leadership have been advanced by retired SOF leaders. For example, in his book *Team of Teams*, retired Army general Stanley McChrystal describes a philosophy of leadership that he learned while commanding a special operations task force (TF) in Iraq, which he describes as "leading like a gardener."[133] In his description:

> The move-by-move control that seemed natural to military operations proved less effective [for his TF] than nurturing the organization—its structure, processes, and culture—to enable the subordinate components to function with "smart autonomy." It wasn't total autonomy, because the efforts of every part of the team were tightly linked to a common concept for the fight, but it allowed those forces to be enabled with a constant flow of "shared consciousness" from across the force, and it freed them to execute actions in pursuit of the overall strategy as best they saw fit.
>
> Within our Task Force, as in a garden, the outcome was less dependent on the initial planting than on consistent maintenance. Watering, weeding, and protecting plants from rabbits and disease are essential for success. The gardener cannot actually "grow" tomatoes, squash, or beans—she can only foster an environment in which the plants do so.[134]

To implement this style of leadership, McChrystal writes that he focused on clearly articulating his priorities to the TF and then ensuring that his words—and especially his actions—clearly and consistently aligned to those priorities. He also focused on pushing authorities and expectations for making decisions to the lowest echelon possible. Even if he *could* make the decision, he often chose not to, in favor of empowering others while he focused on nurturing their ability to make the best and most timely decisions possible. Thus, McChrystal's

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[128] "ADP 6-22: Army Leadership and the Profession," Department of the Army, Jul. 2019, available at: https://armypubs.army.mil/epubs/DR_pubs/DR_a/ARN20039-ADP_6-22-001-WEB-0.pdf. The Army has a long tradition of such publications, dating back to at least 1948. See: "Leadership," Department of the Army, Dec. 1948, available at: https://cdm16040.contentdm.oclc.org/digital/collection/p4013coll9/id/906.

[129] "MWCP 6-11: Leading Marines," US Marine Corps, Nov. 27, 2022, https://www.marines.mil/Portals/1/Publications/MCWP%206-11%20Leading%20Marine.pdf.

[130] For a list of Air Force doctrinal publications, see: https://www.doctrine.af.mil.

[131] Navy doctrinal publications are not publicly available.

[132] For a list of joint doctrinal publications, see: https://www.jcs.mil/Doctrine/Joint-Doctine-Pubs.

[133] Stanley McChrystal, Tantum Collins, David Silverman, and Chris Fussell, *Team of Teams* (Portfolio/Penguin: UK, 2015), pp. 220-232.

[134] Ibid., p. 225.

philosophy of leadership strongly parallels the concept of mission command, though his emphasis on linking entire networks of teams vertically and horizontally—not just his own team vertically—aligns well with the "collective and innovative" quadrant of the adaptive paradox framework articulated by Eetveldt, Oppelaar, and Olsthoorn (Figure 10).

Another example of a SOF leader's philosophy on leadership is *The Mission, the Men, and Me*, a book by former Delta Force commander Colonel (ret.) Pete Blaber.[135] In his book, Blaber describes applying that leadership mantra to several real situations that he experienced during his special operations career. In each instance, Blaber would first focus on taking care of whatever was needed to accomplish the mission at hand. Second, he would focus on taking care of those individuals who had been entrusted to his command to perform the mission. And only after taking care of the mission and those performing it would he focus on himself and his own needs. This philosophy shares some similarities with mission command (e.g., an emphasis on others over self), yet is distinct from it.

Former special operators have published many other books on leadership, which could indicate how important leadership is to the SOF enterprise.[136] However, these books are personal examples of SOF leadership philosophies as opposed to institutionally endorsed or codified ones. Our review of official publications and our discussions with current and former SOF leaders seems to support the finding that no common, overarching philosophy of leadership currently exists for all of US SOF.

SOF do not have a codified set of leadership traits

We synthesized the results of our interviews with SOF SMEs to generate a list of special operations leadership traits in order of prevalence; however, even the most cited trait (character) was named by fewer than half of the respondents. Of the 23 total traits cited by respondents (considering synonymous terms), only three (character, creativity, and flexibility) were cited by more than 30 percent of SMEs.

The services have articulated sets of desired leadership traits to varying degrees. The Army and Marine Corps have very detailed doctrinal publications that discuss their views in depth. The Air Force has a document that does so in somewhat less detail, but it is not a doctrinal publication. As best we could tell, the Navy does not have a formal document specifically on this topic. In addition, no joint doctrinal publication on leadership exists, though we did

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[135] Pete Blaber, *The Mission, the Men, and Me: Lessons from a Delta Force Commander* (Dutton Caliber: New York, NY, 2008).

[136] See, for example: Kyle Lamb, *Leadership in the Shadows: Special Operations Soldier* (Trample and Hurdle: Nashville, TN, 2014); Paul R. Howe, *Leadership and Training for the Fight: Using Special Operations Principles to Succeed in Law Enforcement, Business, and War* (Skyhorse: New York, NY, 2011); or Jocko Willink and Leif Babin, *Extreme Ownership: How US Navy SEALs Lead and Win* (St. Martin's Press: New York, NY, 2015).

identify one Joint Staff document listing desired leadership traits for future enlisted leaders.[137] Thus, the absence of a codified set of leadership traits for SOF is not necessarily unusual within the US military, though it may seem that way given the importance that SOF attach to leadership principles and leader development.

SOF leadership traits are generally aligned to younger generations and the future operating environment

The traits we identified through our engagements with SOF SMEs do not constitute an official set of desired SOF leadership traits; nonetheless, they align well with the traits we identified as being potentially applicable to leading Millennials and Gen Zers, as well as those deemed likely suited for success on future battlefields. The top four (character, creativity, flexibility, and determination) and seven of the top ten[138] traits cited by SOF SMEs also appeared in our literature summaries for the other two categories. Thus, though SOF do not have a formally articulated set of desirable leadership traits, those they informally describe as being important seem generally well aligned to the future of the SOF leadership trinity.

The mixed experience of SOF with leadership development is not well aligned to younger generations or the future operating environment

The SOF SMEs with whom we spoke had as mixed a set of experiences with leadership development—most notably, PME and mentoring—as could be imagined. Some had substantial PME, while others had little to none. Some described the PME they got as high-quality and helpful, while others described it as essentially useless. Some thought JSOU's effort to create SOF-specific leadership courses was a good initiative, while others thought it was bad to further isolate SOF from their service brethren. Roughly half of the SOF SMEs had mentors who helped them through their careers, but the other half described learning by doing and emulation of leaders they admired as mechanisms for their development.

Though preliminary, our research suggests that the mixed experience of SOF with leadership development is misaligned to the expectations of Millennials and members of Gen Z, and is ill-suited for the future battlefield. The younger generations are widely recognized as being the most well-educated Americans in history, and those who join SOF will likely expect to continue their education throughout their careers. Millennials and Gen Zers are also believed to desire

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[137] Colon-Lopez et al., "Developing Enlisted Leaders for Tomorrow's Wars."

[138] These traits are competence, relationship builder, trustworthiness, problem-solver, approachability, empowerment, and risk-taker.

mentor/teacher-style leaders and organizations that invest substantially, directly, and clearly in them as individuals. In addition, experts writing on the demands of the future battlefield identified a requirement for military leaders to become more intellectual, analytic, and technically knowledgeable to be successful. These demands also suggest a requirement for deliberate, continued education and for mentorship of future SOF leaders.

The evolution of SOF leadership traits is partially aligned with the requirements of younger generations and the future operating environment

SOF SMEs were divided regarding whether special operations leadership traits had changed during their careers and whether any identified changes had been for the better. Some thought that interpersonal skills, the ability to build relationships, intelligence, and awareness of operators had improved and that SOF were more transparent in explaining what they do and why they do it, both privately and publicly. Other respondents, however, said SOF leaders had gotten worse at holding operators—and each other—accountable for their actions. These leaders also cited a decrease in good order and discipline, an overemphasis on the special or elite nature of SOF, and an over-reliance on throwing resources at problems rather than thinking creatively or unconventionally about solving them as negative trends.

In comparing these responses to literature on leadership of younger generations and the requirements of the future operating environment, the perceived improvements cited by SOF leaders align well to the future requirement for operators who are more educated, analytic, perceptive, collaborative, and transparent in what they do and why. The perceived shortfalls, however, do not. In particular, the perceived decline in SOF accountability runs counter to the emphasis of Millennials and members of Gen Z on ethical, values-driven leadership. Additionally, though increased emphasis on the elite nature of SOF may appeal to younger generations based on increasing trends in narcissism, it may also exacerbate a feature of SOF that some leaders saw as trending in a negative direction. Other negative trends cited by some SOF leaders, such as less creative (more resource-centric) problem-solving tendencies and declines in good order and discipline, also appear to run counter to the requirements of the future battlefield.

Recommendations

SOCOM should identify and publish a leadership philosophy

Even though not all the services have their own formal publication articulating a philosophy of leadership, the "people-centric" services—the Army and Marine Corps—have detailed

doctrinal publications on leadership, and even the Air Force (generally considered a "platform-centric" force) has a fairly robust document along these lines.

Whether SOF should have their own philosophy of leadership is a reasonable question—and one without an immediate, consensus answer. The SOF enterprise consists of diverse service and joint units with different roles, missions, and capabilities, so a SOF-specific philosophy of leadership may be unnecessary or difficult to identify. However, the Army, Marine Corps, and Air Force also consist of diverse units with different roles, missions, and capabilities, yet these services have identified and advanced overarching philosophies of leadership for their forces.

Given the fact that SOF often operate in ways that are distinct from conventional forces—for example, as small units in austere environments with minimal supporting structures—and given that the SOF leadership traits we identified are different than those identified by the services, we conclude that SOF leadership requirements are distinct enough to warrant their own philosophical treatment. Indeed, the plethora of books written by retired special operators on the subject of leadership suggests that there is something unique about SOF leadership practices. Further, given that the two people-centric services have their own philosophies of leadership and that SOF generally consider themselves to be people-centric forces as well—as expressed in the first SOF Truth[139]—we recommend that SOCOM identify and publish a leadership philosophy for SOF. Doing so would fit well in the "Innovate for Future Threats" line of effort (LOE) within SOCOM's vision document and would help round it out, since that LOE currently appears to be heavily focused on technological advancements rather than human-centric ones.[140]

Given the general disunity among SOF SME responses on this topic, SOCOM could, in principle, start virtually anywhere in creating such a philosophy. However, mission command would be a good starting point, considering that six SOF SMEs mentioned it and the Joint Staff embraces it.[141] Even so, we recommend that SOCOM consider moving beyond mission command—which primarily focuses on the "hierarchical and innovative" quadrant of the adaptive paradox framework articulated by Eetveldt, Oppelaar, and Olsthoorn (Figure 10)—and develop a leadership philosophy more akin to the "Team of Teams" approach articulated by McChrystal and his co-authors. Such an approach, which is more aligned to the "collective and innovative" quadrant of the framework in Figure 10, seems suited for the ways in which SOF typically

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[139] "Humans are more important than hardware." SOCOM, "SOF Truths," www.socom.mil/about/sof-truths.

[140] "Special Operations Forces Vision and Strategy," SOCOM, Apr. 11, 2022, https://www.socom.mil/sof-vision-and-strategy.

[141] Deployable Training Division, "Mission Command: Second Edition," Joint Chiefs of Staff, Jan. 2020, www.jcs.mil/Portals/36/Documents/Doctrine/fp/missioncommand_fp_2nd_ed.pdf?ver=2020-01-13-083451-207#:~:text=Mission%20command%20is%20the%20conduct,command%20demands%20that%20subordinate%20leaders.

operate, to the complexity of the future battlefield, and to the less hierarchical and more decentralized leadership preferences of today's younger generations.

SOCOM should develop and codify a set of desired leadership traits focused on the SOF leadership trinity

We recommend that SOCOM develop and publish a set of desired leadership traits for SOF (potentially as part of the same document articulating a SOF leadership philosophy). We acknowledge that SOCOM has a list of "core values" in its new vision document—honor, courage, excellence, creativity, and respect—some of which overlap with the leadership traits we identified in this report.[142] However, those core values are meant to be touchstones for all special operators, not a specific list of desired characteristics of SOF leaders.

We recommend that SOCOM begin with the list of traits that we identified as being central to the future SOF leadership trinity—character, creativity, flexibility, determination, competence, being a relationship builder, trustworthiness, being a problem-solver, approachability, empowerment, and being a risk-taker—and build on those in the context of its own analysis of future SOF operating concepts, future battlefield requirements, and the future leadership preferences of young special operators. As it does so, we recommend that it examine some of the noteworthy findings of our comparative analysis and their implications for SOF leader development. One of these is that the SOF SMEs cited *transparency* as a desired leadership trait in the followers and context categories of the SOF leadership trinity but not in the SOF leaders category. Another is the absence of team player, initiative, independence, maturity, dedication, and commitment—traits cited by SOF leaders—from the other two categories.

SOCOM should then use this list of leadership traits to drive its efforts—and those of its service components and supporting entities like JSOU—to develop future SOF leaders in a consistent, coherent, and deliberate way.

ASD(SO/LIC) should assess the adequacy of SOF PME and mentorship opportunities

Given the stark disparities in the responses of SOF SMEs to our questions about their experiences with leadership development, combined with the increasing educational experience of younger generations and the requirement for intelligent, analytic, and technically and culturally savvy leaders for the future battlefield, we recommend that the Special Operations Secretariat within ASD(SO/LIC), in conjunction with SOCOM, holistically assess the adequacy of PME and mentorship opportunities for SOF with regard to leadership

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[142] "Special Operations Forces Vision and Strategy," p. 1.

development. We recognize that SOCOM is reliant on the services for formal PME and that it has little sway over the content of those programs. That should not, however, prevent it and ASD(SO/LIC) from assessing the adequacy of those programs for the needs of special operators and leveraging forums such as the Special Operations Policy and Oversight Council to advocate for necessary changes. A formal review of available PME could also help JSOU further tailor the SOF-specific courses it offers, which are not offered at service PME schools, to develop leadership traits for SOF.

We also recommend that ASD(SO/LIC), in conjunction with SOCOM, catalog and assess the adequacy of mentorship programs and approaches across the SOF enterprise. The general view among the sources we examined is that mentorship relationships are best developed organically. However, the formation of such relationships does not need to be left to chance, since there are ways to encourage the informal formation of such relationships—such as developmental networks and "mentoring constellations."[143]

We acknowledge that some parts of the SOF enterprise are already moving out on the future of SOF leader development. For example, NAVSPECWARCOM established a leadership development command (Naval Special Warfare Leadership Education and Development Command (NLEAD)) whose goal is to provide constructive opportunities for leadership skill development outside the tactical arena. It focuses on raising and promoting executive-level officers through increased use of tools such as 360-degree reviews and expanded fitness assessments. USASOC has also established an O-6 led Force Modernization Center, which is working to improve the development of future Army SOF leaders. These commendable efforts should be supplemented by a broader review of SOF PME and leader development activities and opportunities.

SOCOM should reinforce efforts to improve SOF accountability

In 2019, following multiple negative public incidents involving special operators, SOCOM conducted a comprehensive review of SOF culture and ethics, the results of which were published in January 2020. As the report from that review states, "The Review Team did not assess that USSOCOM has a systemic ethics problem. The Review Team did assess that in some instances USSOCOM's cultural focus on SOF employment and mission accomplishment is to the

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[143] According to scholars of mentorship, the latter can be conceptualized as a developmental network or "constellation," defined as "the set of relationships an individual has with people who take an active interest in and action to advance the individual's career by assisting with his or her personal and professional development." Monica C. Higgins and David A. Thomas, as quoted in Maureen Vandermaas-Peeler, "Mentoring for Learner Success: Conceptualizing Constellations," Elon University Center for Engaged Learning, Feb. 18, 2021, https://www.centerforengagedlearning.org/mentoring-for-learner-success-conceptualizing-constellations/#:~:text=Scholars%20of%20mentoring%20in%20the,or%20her%20personal%20and%20professional.

detriment of leadership, discipline and accountability."[144] The report goes on to detail how the command arrived at that conclusion and identifies recommended actions in five areas: force employment, force accountability, leader development, force structure, and assessment and selection. In the wake of the report's findings, General Richard Clarke (the SOCOM commander) created a Comprehensive Review Implementation Team to track the command's actions against the report's recommendations.

These actions have been viewed favorably by external audiences (e.g., Congress), and SOCOM's service components have taken similar actions. For example, NAVSPECWARCOM launched the Naval Special Warfare Leader Assessment Program with the intent of increasing the rigorousness of its leader selection processes. The new program incorporates "a double-blind interview process and counter-cognitive bias training to increase objectivity and fairness of selection decisions, psychometric testing, writing and physical evaluation, and directed peer and subordinate assessments" to increase the amount of information available to those making leader selection decisions.[145]

Fixing the conditions that lead to ethical lapses and making lasting changes to culture require sustained attention. Of note, SOCOM's new vision document emphasizes the requirement to "continue a long-term institutional approach to develop SOF leaders and uphold integrity by correcting lapses in leadership, accountability, and discipline."[146] In reviewing literature pertaining to the desires of Millennials and members of Gen Z, we identified a focus on *accountability* and *values-based leadership* as being critically important. Accountability was also one of the five leadership traits articulated by joint and service enlisted leaders as being required for future enlisted leaders.[147] We therefore recommend that SOCOM, under the oversight of ASD(SO/LIC), maintain a steady focus on the accountability of SOF leaders going forward. Such accountability is likely to continue to be demanded by Congress and by younger generations of special operators as well.

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[144] "United States Special Operations Command Comprehensive Review," SOCOM, Jan. 23, 2020, p. 4, https://sof.news/pubs/USSOCOM-Comprehensive-Ethics-Review-Report-January-2020.pdf.

[145] "Posture Statement of Rear Admiral H.W. Howard III, USN Commander, Naval Special Warfare Command, Before the 117th Congress Senate Armed Service Committee," Apr. 28, 2021, p. 2.

[146] "Special Operations Forces Vision and Strategy," p. 11.

[147] Colon-Lopez et al., "Developing Enlisted Leaders for Tomorrow's Wars."

Conclusion

To our knowledge, this study represents the first detailed examination of SOF leadership through the lens of the "leadership trinity" of leaders, followers, and context. Our approach consisted of interviews with current and recently retired SOF leaders, a review of the literature on the characteristics and recommended approaches to leading Millennials and members of Generation Z, and a review of literature on the leadership requirements of the future battlefield. We conclude that SOF should create a shared understanding of their philosophy of leadership and their desired leadership traits, that they should ensure the continued alignment of those traits with the preferences of younger generations (including a continued emphasis on accountability), and that they should assess the adequacy of PME and mentorship for producing future leaders across the force. If ASD(SO/LIC) and SOCOM were to collectively take these steps, the force would be enabled to pursue deliberate, thoughtful development of future SOF leaders and to advance the "talent management" and "accountable leadership" aspects of SOCOM's vision and strategy.[148]

Additional avenues of research that would be useful to pursue include the following:

- *Expanding the sets of data*: Interviewing additional current and former SOF senior leaders—or conducting a more expansive, formal survey of them—would help generate more robust insights than we could in this study. Similarly, additional research could identify the most relevant leadership traits to Millennials and members of Gen Z in the military (e.g., through surveys of those populations) as well as leadership traits required for the future battlefield (e.g., through surveys, wargames, or commissioned studies).

- *Narrowing the focus of the generational lens*: For this study, we relied on extant studies of generational differences, which primarily focus on non-military populations. Given that the US military is not exactly representative of the US civilian population (e.g., in terms of racial, economic, or geographical backgrounds), it would be interesting to conduct more focused research on the differences of generational cohorts *within the military*. Narrowing the focus of that part of the leadership trinity would provide results with more fidelity for the military.

- *Examining leadership across echelons and stages of careers*: We focused on senior leadership in this study, and to a lesser extent on the development of senior leaders. It

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[148] "Special Operations Forces Vision and Strategy," pp. 10-11.

would be interesting to conduct similar examinations at junior and midcareer echelons of SOF leaders to see how they compare to the results we identified in this effort.

- *Examining "nurture" versus "nature"*: In line with our recommendation to examine the adequacy of service provided PME for SOF, it would be useful to research which of the leadership traits we identified are the most (or least) likely to be present at the end of SOF assessment and selection programs. In other words, which traits can effectively be treated as present at the outset of an operator's career, and which need to be developed over time?

As General Clarke stated in his 2022 congressional posture hearing, SOCOM's "commitment to high ethical standards, engaged leadership, and maintaining accountability within SOF is critical to sustaining the trust earned over decades."[149] The findings and recommendations in this report—which we acknowledge are more suggestive than conclusive—should nonetheless help the SOF enterprise as it seeks to maintain that commitment.

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[149] "Statement of General Richard D. Clarke, USA, Commander, United States Special Operations Command Before the 117th Congress House Committee on Appropriations Subcommittee on Defense," SOCOM, Apr. 7, 2022.

Appendix: SME Engagement Details

This appendix presents the details of our engagement with senior SOF SMEs, as well as the demographics of the pool of SMEs with whom we engaged.

Engagement questions

We used the following list of questions as the foundation for our engagements with senior SOF SMEs in support of our efforts to address the study's first question:

Q1: How would you describe the basic philosophy of special operations leadership?

Q2: What would you list as the most important attributes of special operations leadership?

Q3: How does that philosophy and/or those attributes differ from the way general purpose forces think about leadership? (i.e., Do you see SOF leadership as itself "special" in some way?)

Q4: Were you specifically trained, educated, or mentored on those attributes or are they something you picked up through career experiences?

Q5: Over your career, did you find that there were enough opportunities for you to develop these attributes through training, education, and/or mentoring? If not, what else would have been helpful?

Q6: Did you see the philosophy and/or attributes of special operations leadership change during your career? If so, in what ways and why do you think those changes occurred?

Q7: If you think back to the first few years of your career, what were your expectations and desires from your SOF leaders?

Q8: As you progressed in your career as a special operator, did your own leadership style change? If so, in what ways and why?

Q9: Do you think SOF leadership needs to change going forward? If so, in what ways and why?

For active duty members only, we also asked: Do you sense significant differences in the leadership expectations and desires of young individuals in your organization today relative to yours at that age? If so, what are they?

SME demographics

In total, we reached out to 59 identified senior SOF SMEs, including a mix of active (39) and retired (20) SMEs, military (55) and civilian (4) SMEs, and members from the four service components of SOCOM: Army (28), Air Force (9), Navy (12), and Marines (6). These individuals ranged in rank (or civilian equivalent) from Officer/Enlisted (O/E)-6 to O/E-10. Although we sought to identify as diverse a set of SMEs as possible, the leadership of US SOF has traditionally been overwhelmingly white men. We were able to identify and contact six senior SOF women and three senior SOF leaders of color.

We completed engagements with 29 of the 59 individuals we contacted (49 percent). Of these, 27 were military and two were civilians. Of the military SMEs, 59 percent were actively serving, and the rest were retired. The ratio of officers to enlisted was 2:1; their average overall rank (on a scale of O/E-1 to O/E-10) was 8.6. We engaged with four women and two individuals of color. The percentages of military respondents by service were as follows: Army (56 percent), Air Force (19 percent), Navy (15 percent), and Marines (11 percent). This compares reasonably well to the total breakout of US SOF by service: Army (53 percent), Air Force (26 percent), Navy (16 percent), and Marines (5 percent).[150]

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[150] US SOCOM Office of Communications, "Fact Book 2022," SOCOM, https://www.socom.mil/FactBook/2022%20Fact%20Book.pdf.

Figures

Tables

Abbreviations

AFSOC	US Air Force Special Operations Command
ASD(SO/LIC)	The Assistant Secretary of Defense for Special Operations and Low-Intensity Conflict
DOD	Department of Defense
JAMRS	Joint Advertising and Marketing and Research Studies
JSOU	Joint Special Operations University
LOE	line of effort
MARSOC	US Marine Forces Special Operations Command
NAVSPECWARCOM	Naval Special Warfare Command
NLEAD	Naval Special Warfare Leadership Education and Development Command
O/E	Officer/Enlisted
PME	professional military education
SEA	Senior Enlisted Advisor
SES	Senior Executive Service
SF	Army Special Forces
SME	subject matter expert
SOCOM	US Special Operations Command
SOF	special operations forces
SOPs	standard operating procedures
TF	special operations task force
USASOC	US Army Special Operations Command

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This report was written by CNA's Strategy, Policy, Plans, and Programs Division (SP3).

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