



Educating for Strategic Thinking in the SOF Community: Considerations and a Proposal

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Foreword

In the author's view the 21st century is proving to be more chaotic and challenging than many policymakers anticipated at the end of the Cold War. As a result, the military element of power will be even more critical to ensuring the security of the United States and the achievement of national interests. While all the service capabilities are essential and joint warfare will remain at the heart of American military strategy, the Special Operations Forces (SOF) operational and strategic roles will continue to expand and evolve because SOF personnel and SOF-centric strategies will bridge the gap in conventional force shortfalls as well as overcome nontraditional challenges. The changing strategic responsibilities require a greater emphasis on SOF strategic thinking at all levels of war and a reconsideration of the development of senior leaders and strategists within the SOF community.

Adapting to the requirements of the new strategic environment is problematic at best. If the past is predictive of the future, the author warns, operational requirements will tend to pull the prospective candidates for the strategic roles toward the tactical fight and away from educational and developmental assignments necessary to build strategic competence. As it is, current education in strategy and strategic thinking is dependent on service institutions where the SOF component is often limited. Furthermore, he argues a SOF school of strategic thought is not fully developed or well articulated. As a consequence, education is curtailed and an essential SOF perspective may not be sufficiently represented in the national debate.

The author praises United States Special Operations Command's recent examination of the competency of strategic thinking and urges acting now to ensure the SOF leaders and performance required by the 21st century. To that end he lays out concrete steps in SOF education leading to the development of the appropriate strategic thinking at the different levels of war.

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Rich Yarger received his Ph.D. in History from Temple University. His prior degrees were a B.A. in History from Cameron College and an M.A. in Human Relations from the University of Oklahoma. He is the professor of National Security Policy in the Department of National Security and Strategy at the U.S. Army War College, Carlisle, Pennsylvania. Dr. Yarger also serves as an associate fellow with the JSOU Strategic Studies Department. He teaches various courses—Fundamentals of Strategic Thinking, Theory of War and Strategy, National Security Policy and Strategy, and Grand Strategy.



Dr. Yarger's research focuses on national security policy, strategic theory, and the education and development of strategic level leaders. In addition to teaching positions, he served for 5 years as the U.S. Army War College Department of Distance Education chair. Dr. Yarger has also taught at the undergraduate level at several civilian institutions. A retired Army colonel, he is a Vietnam veteran and served in both Germany and Korea.

Educating for Strategic Thinking in the SOF Community: Considerations and a Proposal

Introduction

In 2002, then Secretary of Defense Donald H. Rumsfeld challenged the Special Operations Forces (SOF) world by giving United States Special Operations Command (USSOCOM) the lead in planning for the war on terrorism. In the 2005 Unified Command Plan, USSOCOM completed the transition from a supporting command, with the responsibility to provide forces to other regional United States (U.S.) commanders, to that of a supported command.¹ Former Secretary Rumsfeld clearly saw that the 21st century strategic environment presented significant challenges for a conventionally oriented military. With his directives USSOCOM became a full fledged strategic military actor, but the change raised questions about the SOF community's preparation for its new strategic responsibilities.²

The image of tactical “snake eaters” and individual and small unit tactical focus appear to be in direct contrast to the increasing strategic role of SOF senior leaders and staff members. Equally important, increasingly SOF will be placed in situations where poor tactical decisions can have significant negative strategic consequences or the fleeting opportunity for positive strategic effect is revealed. How well are SOF personnel prepared for these roles and how best can the SOF “operator” acquire strategic awareness and appreciation and develop strategic thinking abilities for his level? The objective of this monograph is to examine the issue of “strategic thinking” in SOF—what is the future need and how should the community develop and better inculcate strategic thinking in its members.

A 21st Century Special Operations World View

The first quarter of the 21st century is a promising time, but will place increasing demands on all of the U.S. military and the SOF community in particular. Globalization and the intertwining of

American interests with the stability and success of the rest of the world will continue and accelerate. Shared and often disparate interests will require the coordinated use of all the socially determinant elements of U.S. power—economic, informational, diplomatic, and military. Technology, information systems, and knowledge profusion will continue to advance and spread at an exponential rate, allowing significant enhancements to U.S. military capabilities while at the same time providing new opportunities for mischief to be exploited by a range of adversaries and lesser friends. U.S. democratic ideology, culture, and material wealth will inspire both emulation and hatred as other societies and cultures measure the value of their achievements against those of the U.S. Some will seek to leverage or aggressively imitate and exceed U.S. success. Others will try to protect their own interests and cultural uniqueness while decrying real or perceived U.S. excesses.

Few groups—nations or non-state actors—will be totally impartial to U.S. interests and U.S. efforts to protect them, some will be openly hostile to U.S. power, and fewer still will align with the U.S. on every issue. The overall quality of life of the peoples of the world will continue to improve, but not as quickly or in the forms that many would wish, making the laggard and failing nations even more obvious and problematic. As a result of the media and information revolutions, this dichotomy will be more apparent than ever to them. Their own leaders and others will exploit their fears and dissatisfaction.

The military world of 2025 will differ radically from that of most of the last half of the 20th century. In this world the U.S. will remain the single most dominant economic and military power, exercising world leadership through loose and often fleeting coalitions of other like-minded nations who share in or seek to share in the riches and advantages of globalization. Peer or near-peer regional competitors will arise in different areas of the world and will cooperate, align, or distance themselves from the U.S. as they perceive their national interests or view individual issues. No true global peer competitor will be able to confront the U.S. until 2020 or after, regional competitors will have the ability to directly threaten the U.S. homeland with strategic forces; and others may have capabilities such as cruise missiles that pose a discrete but limited threat. Non-state actors may resort to chemical, biological, radiological, or nuclear weapons to threaten or openly attack the U.S. homeland or allies. The existence of peer

or near-peer regional competitors and non-state adversaries, combined with the wide dispersion of military-related and dual-use technologies and dispersed knowledge of weapons of mass destruction (WMD), will create a continuous backdrop of tension and threats.

One way to conceptualize the threats confronting the U.S is to see them as a global insurgency against the emerging 21st century world order for which the U.S. is the primary architect. The war on terrorism is but one manifestation of the emerging challenges.³ Others may react against this new world order also. The U.S. military will provide crucial stability for the transformation to this 21st century world order. The multiple challenges of the security environment are expressed in Figure 1.

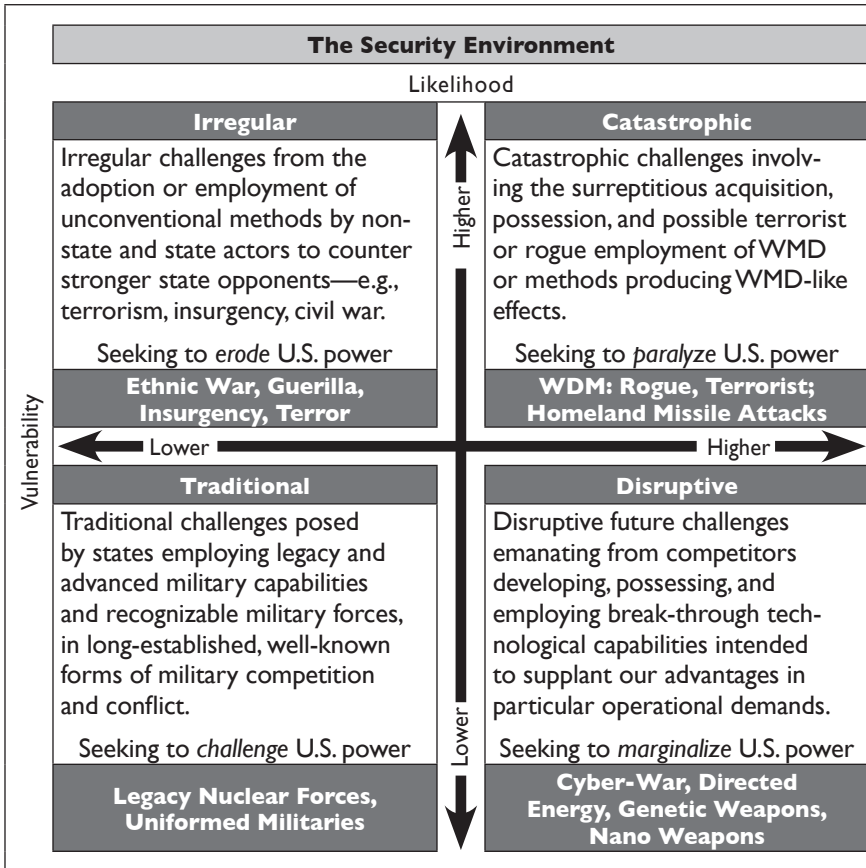


Figure 1. Security Environment Matrix ⁴

In addition, the presence of real-time and global news media, combined with an increasing global expectation that U.S. power can and will mitigate many crises, will lead to increasing use of U.S. military forces in noncombat operations in such areas as natural disaster relief, political unrest, or government collapses that place peoples of the world or global interests in jeopardy. U.S. policy makers will find their success or failure to address these operations judged by an interested—and perhaps critical—domestic voting population. Similarly, an increasing international population will force their own leaders to align with U.S. interests and policies based on their perception of the U.S. success in meeting global needs in these areas. While these noncombat operations pose no direct threat to U.S. survival, they do affect world and domestic opinion, impact on U.S. interests, and create opportunities or breeding grounds for our adversaries.

Thus in the first quarter of the 21st century, the U.S. military will find itself challenged across the whole spectrum of operations. Judging from history, the military will have only minimal force structure to address these multiple challenges. At the same time, funding priorities must continue to focus on research and development to maintain a diminishing technological advantage over the proliferation of missile and other threatening technologies employed by real and potential adversaries. Overall, U.S. military spending will be characterized by smaller forces and more technology as policy makers seek to counter new vulnerabilities even as they wrestle with the probabilities of conflict. Joint, interagency, and multinational cooperation will characterize most operations because the best resolutions suggest it and fiscal constraints demand it.

The incessant and longer-duration mission requirements of the 21st century will require land power and be manpower intense—land war, regional hegemonic war, small wars, unconventional war, homeland security, forced intervention, occupation, military operations other than war—particularly stability and support operations, and sustained humanitarian relief operations. But success on land will be dependent on effective air and maritime power. In this very complex environment, the mission requirements for all U.S. forces will increase; *SOF missions will grow exponentially*. However, SOF will not compete with the transforming conventional forces as in the past, but will function as an integrated force in strategy development and execution—sometimes in the supported and sometimes in

a supporting role. SOF capabilities will bridge the force structure gap in conventional forces and play a pivotal role in preventing, preempting, and fighting wars; countering the activities or potential activities of emerging adversaries; and leveraging humanitarian operations for strategic gain. Mission success will be contingent on integrating SOF early with conventional, interagency, and multinational capabilities into innovative, and sometimes unorthodox, strategies and plans.

Some may argue this assessment is too pessimistic. Others may speculate that the challenges will be even greater. Few future scenarios now paint a picture of a globalizing world with the relative stability and predictability of the Cold War era.⁵ Any realistic scenario suggests that the world now emerging, and the role SOF will play, requires greater strategic astuteness in SOF personnel at all levels—a SOF strategic competency. To build this strategic proficiency the community must overcome the major strategy dilemma confronting them.

The SOF Strategy Dilemma

The cornerstones for SOF success are its culture, quality personnel and training, and understanding of the missions. Former Secretary Rumsfeld's directive and the critical role of SOF in the emerging security environment pose challenges and changes for each of these. USSOCOM's new strategic responsibilities, in particular, ask what must USSOCOM do to ensure proper strategic thinking within the community at each level of war. The USSOCOM and SOF dilemma is how to bridge from a successful past to a different future while fully engaged in the emergence of that future—it begs questions for which the answers are neither easy nor always pleasing.

SOF Culture Challenges. SOF culture is an issue. The USSOCOM vision focuses on two missions: 1) "...plan, direct [synchronize], and execute the Global War on Terrorism" in its role as the lead combatant command and "train and equip" SOF for the current and future fight and 2) "...be the premier team of special warriors, thoroughly prepared, properly equipped, and highly motivated at the right place, at the right time, facing the right adversary, leading the Global War on Terrorism, accomplishing strategic objectives of the U.S."⁶ In tasking itself to accomplish the strategic objectives of the U.S., USSOCOM retains the warrior image and the tactical focus of a team physically present at the right place and time to engage the enemy. Herein is

illustrated the duality of the SOF mindset—one that sees tactics and strategy as the same when in fact they are interrelated and interdependent, not the same things at all.

Another version of the cultural perspective is the mantra “all SOF is strategic.” There are good reasons for this mindset. A large part of SOF experience links tactical operations directly to national objectives, but that is not to say tactical planning is strategy development. The needed 21st century strategic thinking will be problematic across the SOF community until the members understand and accept the distinctness of the levels of war and learn to appreciate their role as strategic thinkers in each. With an appreciation of these levels, as it applies individually and collectively, the SOF community can educate SOF personnel to function more effectively at all levels in anticipating and countering the increasing challenges of the 21st century; but in particular, it can advance SOF senior leaders, strategists, and planners who can best contribute to achieving the nation’s interests. SOF adaptability is already evident in the individuals who have been thrust into new roles, but the issue is how to better prepare the whole community.

How well prepared are SOF personnel for strategic thinking? To effectively address this question, we must first examine what *strategic thinking* means; and the community may not have given this aspect of SOF professionalism sufficient consideration. Testifying before the House Committee on Armed Services in October 2005, Michael G. Vickers noted that SOF needed to develop strategists to improve SOF strategic performance.⁷ In his more

detailed full report, “Transforming U.S. Special Operations Forces,” published in August 2005, Mr. Vickers analyzed SOF transformation and concluded the SOF community has not done a good job of devel-

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oping strategists and that to do so will require changes in military education and career progression patterns within the community.⁸ While Mr. Vickers’ assessment may be debated, he is not alone in his criticism or concern.⁹ Historically, the SOF community has relied on service schools to teach strategy and it can be argued SOF personnel are as well trained as anyone. Additionally, the SOF selection criteria and the nature of SOF training and missions yield greater individual

adaptability and perhaps strategic exposure than most conventional service. These two observations, however, miss the essential point.

The question confronting the SOF community is whether the current levels of strategic thinking are sufficient for the new responsibilities in the emerging environment. The answer is no, and the issue needs to be addressed now.¹⁰ As suggested, future success requires a cultural change. It also requires SOF leadership to invest the people and resources to create the required strategic thinking. At the same time, all-time high operational requirements, lack of a well-known and unifying SOF school of strategy, and failure to adopt a common theory of strategy pose significant challenges to enhancing strategic thinking within the community. To fulfill its 21st century role, SOF must recognize and overcome these challenges and properly develop and educate its population.

The Operational and Personnel Management Challenges. SOF will continue to experience personnel management issues in the foreseeable future that affect the community's ability to appropriately develop strategic thinking and produce SOF strategists. Just as the SOF community most needs proactive strategic thinking to confront new and daunting challenges, a personnel scenario is developing that is very unfavorable to enhancing strategic thinking and producing strategists. The personnel management issues are driven by extreme operational requirements and fall into three major categories—accessions, retention, and development.

SOF recruit exceptional individuals from within the services—each individual meets higher, and often different, standards and skills and competencies than the typical service recruit.¹¹ These requirements have been validated over time and appear to place practical limits on the availability of new accessions for both the officer corps and the enlisted ranks, even if standards are modified. As the need for more SOF personnel escalates, the personnel system is unlikely to meet the recruiting demand in a timely fashion. In addition, the emerging security environment will continue to make SOF personnel attractive to civil enterprises—such as defense contractors—where the pay can be much better. Consequently, the operating tempo for serving members will probably increase, which will decrease the time available for schooling or other professional developmental opportunities.

As SOF requirements increase and operational shortages develop, personnel managers will prioritize assignments in favor of the operational requirements with predictable results. They will look for efficiencies within the system to maximize officers' and noncommissioned officers' time in operational units. The time available for institutional training and education will decrease. Initially they will look for more efficient ways to train and educate, and some genuine efficiency may be realized.¹² Ultimately, however, personnel managers will be forced to look for "unnecessary" or "not fully justified" training and education programs—training and education that cannot be directly linked to the next operational assignment. Next, a period of denial of developmental training and education with appropriate "constructive" credit for individuals will follow. Even opportunities for SOF personnel to attend strategic education at service schools will most likely decrease. Consequently, at a time when SOF strategic thinking and perspective at all levels of war is most critical, the community will likely not be preparing its personnel through appropriate training and education programs.

Learning can occur in other than an academic environment. Strategic knowledge can be acquired through experience, but the fundamental purpose of military training and education is to prepare individuals for increased responsibilities and shorten the learning curve on the job, whether at peace or in war. Experience is a great teacher but it invariably costs more in effort, treasure, and blood. At the higher levels of staff and command, even strategic experience may be denied SOF personnel.

As the community is dragged deeper into the tactical world as a result of operational needs, SOF-coded positions on various strategic level staffs will go unfilled. Vacant positions or positions filled with non-SOF personnel create two significant strategic consequences. First, experienced SOF perspective and expertise is lessened in the strategy formulation and decision processes. In the forecasted strategic environment, this situation poses a potential catastrophic problem since proper use of SOF is instrumental in the future security environment. Second, SOF personnel are denied essential development opportunities to enable them to best compete for and effectively perform in strategic leadership positions. With neither educational nor adequate developmental assignments to foster an appropriate

strategic perspective, the community is left with a promotion and leadership quandary. Who should be promoted to fill the key strategic level staff and leadership positions that require strategic thinking competencies? Competitive promotion of the best of the unprepared is not a satisfactory solution. Over time these detriments to development in strategic thinking will increasingly affect the quality and success of SOF contributions to national defense—risking making these contributions less influential and more reactive at a time when innovative and proactive solutions are most needed. If this is allowed to occur, the nation is largely deprived of the key strategic advantage of SOF.

The solutions to these challenges require good strategic thinking and appropriate action by today's SOF leadership. The fundamental problem of increasing demands for SOF personnel in the emerging strategic environment has already been recognized, and initial steps to build a larger force have been undertaken.¹³ These steps should be re-examined to ensure that any potential long-term second- and third-order effects are mitigated as much as possible *and* expediency does not lead to counter-productive long-term effects. It is also clear that confronted with the strategic responsibilities assigned by the Secretary of Defense, SOF leaders recognize a need to build an increased strategic competency—SOF strategic practitioners and strategists—within the community. What needs clarifying is, What constitutes strategic competency and how will it be accomplished long term? SOF leadership must apply effective strategic thinking to get this right.

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Any solution must have both an experiential and an educational component. An effective career progression model addresses the experiential component, routing noncommissioned officers and officers through appropriate operational, command, and staff positions of increasing challenges and responsibility based on their observed performance and potential. For the talented, such a pattern should include positions on both SOF and conventional staffs that allow for development of strategic perspective and practice of strategic competencies. These positions are generally well known within the personnel system, and issues are primarily centered on identifying the

right individuals and making them available for the assignment. The educational component is addressed in some detail here.

Levels of Understanding. Requirements for *strategic thinking* differ among SOF personnel. In the broadest sense, the focus is the *quality* of the specific thinking that SOF personnel require at the level and in the role at which they are functioning. (See Figure 2 for levels of thinking.) The term *strategist* is avoided here because it implies a unique role and special competencies and skills that are neither required by nor can be taught to all SOF personnel. What is required and what currently exists in strategic thinking within the community is open to debate, but the need is clear. The issues can be clarified and the debate can be moved forward by postulating requirements at the respective levels and how to best develop it. In that regard, SOF strategic thinking can be classified in terms of the levels of war as they are currently defined with some modest, but key differences. The levels of war require different levels of understanding and imply different levels of education and development, which poses the what, who, when, and how to teach questions. These levels can then be somewhat equated to ranks performing at that level and related back to career progression and educational models. Understanding and articulating the strategic thinking required at each level is crucial to determining what SOF strategic competency needs to be and how to build and sustain it.

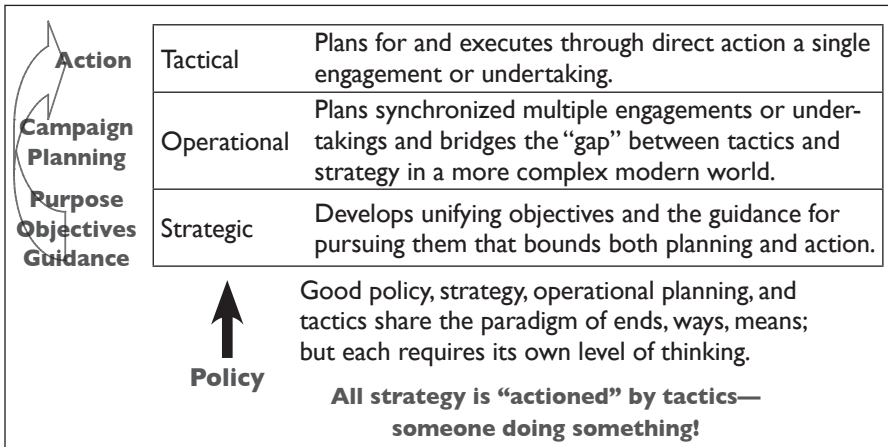


Figure 2. Relationship Among Levels of Thinking

Tactical Level. Strategy is not tactics, and tactics is not strategy. Tactics are the employment and ordered arrangement of forces in relation to each other to accomplish a specific task.¹⁴ Tactics ultimately implement strategy, providing the detailed actions and maneuvers that lead cumulatively to the achievement of the strategic objectives. Tactics are the actual engagements or operations at the point of the strategic spear. When the tactics are appropriately designed and executed, they create positive strategic effects that contribute to or achieve the strategic objectives. When the tactics are inappropriately selected or executed, they may also create strategic effects that are negative—that is, have undesired strategic consequences. Effects and consequences may be multi-ordered (e.g., first order, second order, and third order) and can occur from action taken, action not taken, chance action, and the reaction of other actors. Good tactics seek to create desired strategic effect and avoid undesirable strategic consequences.

A popular misconception in military thought is that the tactical and strategic levels have been compressed by globalization, and particularly the almost instantaneous availability of information through modern media and the Internet. The appeal of this

A popular misconception in military thought is that the tactical and strategic levels have been compressed by globalization ...

argument is that it provides an alibi for the inability or unwillingness of strategic and tactical practitioners to adapt to the emerging strategic environment. However, the argument is wrong. Most examples of so-called “compression” are really illustrations of woefully inadequate information operations strategies and capabilities or unwillingness to act, not compression of levels. Modern communications rapidly expand access to information and compressed response time, not the levels of war. Bad tactics have always had strategic consequences. Modernization may magnify or complicate tactics, but it does not change the distinctness or the fundamental relationship among the levels. Modernization does beg the question of how to train and educate tactical leaders for the emerging environment—that is, it suggests a greater need for a degree of strategic awareness or appreciation at the tactical level to inform tactical initiative.

A SOF version of the compression of levels of war is the mantra “all SOF actions are strategic.” This misconception stems from specialized SOF missions generated at the strategic decision level where the strategic and tactical objectives have been virtually identical. But there are fundamental differences in the thought processes. The tactical operation has its own level of planning that is distinct from the ends, ways, and means of the strategy. Strategy selects objectives to create strategic effect. Tactics normally selects subordinate objectives to contribute to the accomplishment of the larger strategic objectives. The strategic concept identifies SOF as the best instrument to achieve the objective. Tactics plans the mission and the specific actions to be taken on the ground in employing SOF. Strategic resources identify what will be made available to support accomplishment of the objective. Tactics identifies the specific forces, equipment, and supplies that are to be used for the mission. On those occasions when the strategic and tactical objectives coincide, strategic thinking has defined the objective, and tactical thinking accepts it as a direct action. Tactical planning may be elevated for important missions, but the thought process is separate and subordinate to strategy.

Historically, military doctrine has been used to bridge the gap between the dynamic nature of the strategic environment and the tactical plan. Doctrine answered the tactical planning questions and once engaged, adaptability was achieved through reference back to existing doctrine. Nondoctrinal innovation was rewarded in war when it was right and punished when it proved wrong. For conventional forces, a doctrinal model remains the most effective and efficient concept for training and employing large forces for most missions. Doctrine will continue to play a key role for SOF, but for SOF tactical operators on the ground and dealing directly with other nationalities, it is increasingly important that they develop an even higher appreciation of strategy and strategic thinking—captains and sergeants with enhanced strategic appreciation and awareness.

Such tactical operators will not be developing strategies for USSOCOM, but they will be in a position to better execute strategies through tactical action and initiative and to recognize potential strategic opportunities and issues. SOF operators at this level are at the point of the strategic spear and are directly engaged in the special operations core tasks of direct action (DA), counterterrorism (CT),

foreign internal defense (FID), unconventional warfare (UW), special reconnaissance (SR), psychological operations (PSYOP), civil affairs operations (CAO), information operations (IO), or counterproliferation of weapons of mass destruction (CP). In the 21st century environment, these warriors increasingly will be placed in situations that are not doctrinally clear and will not always have the time to refer to a higher headquarters. Indeed, in much of the SOF environment, the layering of leadership and support found in conventional units is absent and adaptability and innovation are heavily relied on today—a strength of the community that will be increasingly relied on in the future. Because of the uniqueness of the SOF missions, any SOF individual is likely to be placed in situations where poor tactical decisions can have significant strategic consequences, or a fleeting opportunity for positive strategic effect can go unrecognized and thus be lost. Hence a level of strategic awareness and ability to think strategically sufficient to evaluate the purpose and methods of a strategy and determine what tactical actions are appropriate must be developed in all SOF operators. Such expertise would consist of a basic understanding of strategic theory and the relationship between strategy and tactical actions. Its primary purpose is to frame initiative on the part of the tactical operator in a manner that serves strategic ends, limits unintentional harm, and takes proper advantage of unanticipated opportunities.

... any SOF individual is likely to be placed in situations where poor tactical decisions can have significant strategic consequences ...

Such logic suggests that SOF operators should be introduced to strategic theory and sufficiently educated to evaluate their role in and intelligently execute their part of a strategy. *Where* their direct tactical action accomplishes the strategic objective and *when* their tactical role is part of an integrated effort may have greater implications for strategic success than in the past. This means they must comprehend the strategic effects sought and what tactical actions contribute or detract from those effects. Such education should inform tactical initiative, teach how to recognize a potential strategic opportunity, and seize or report it as appropriate. Obviously, a proper approach would also apprise of how to anticipate and avoid negative strategic consequences.

Operational Level. This level of war is the echelon between tactics and strategy. Operational art bridges the gap between the strategic objectives and specific tactical actions—that is, when the strategic objectives require the accomplishment of multiple and interrelated tactical actions. Through the campaign plan with its subordinate objectives and concepts, operational art sequences and synchronizes tactical actions by various agencies and organizations so that the integrated and cumulative effects lead to accomplishment of the strategic objectives.¹⁵ While SOF tactical actions in many circumstances may have a direct correlation to strategic objectives, the new strategic responsibilities and missions the Secretary of Defense assigned to USSOCOM suggest a greater planning role for SOF personnel. Understanding the relationships among tactics, operational art, and strategy is important to the SOF professional planning of any core task.

SOF planners at the operational level must develop campaign plans that reflect complete understanding of the purpose and intent of strategy and the ability and limitations of capabilities to support them. They must be able to evaluate, and sometimes challenge, strategies in order to properly plan for their execution. Planning makes strategy actionable. It adapts strategy to a concrete world with facts, figures, and interrelated and sequenced actions calculated to achieve the objectives of the strategy. Planning must create strategic effects that support and are not counterproductive to the stated policy goals or national interests. Such planning expertise requires a comprehensive understanding of strategic theory and the nature of the strategic environment. Its purpose is to make strategy actionable by imposing linearity and certainty onto the inherently chaotic nature of the strategic environment so that it can be positively influenced to favor national policy.¹⁶

SOF officers and noncommissioned officers need to understand the operational level of war and the relationship among operational art and strategy and tactics and will be called on to use this knowledge at the appropriate time in their careers. Such professionals may find themselves assigned at USSOCOM, other combatant commands, the Joint Staff or Department of Defense, Theater Special Operations Commands, Joint Task Forces, or a Joint Special Operations Task Force. In these positions they may be planning any of the nine activities designated as special operations core tasks, integrating these

SOF capabilities into the supported command's overall campaign, or planning future force capabilities. Bridging the gap between tactics and strategy requires a high level of strategic thinking in order to evaluate and plan for the execution of a strategy. Today, under the current delegation of authority from the Secretary of Defense, USSOCOM staff officers and noncommissioned officers are deeply engaged in campaign planning and coordination. USSOCOM's responsibilities involve not only planning for SOF-centric campaigns but also campaign planning for integrated efforts among conventional forces, SOF, and nonmilitary agencies and organizations. Such planning requires them to be able to understand and evaluate strategy in order to do effective campaign analysis and planning.

Strategic Level. At the highest level, *strategy* is the art and science of developing and employing instruments of national power in a synchronized and integrated fashion to achieve theater, national, and/or multinational objectives. A subset of this level is military strategy, which is the art and science of employing the armed forces of a nation to secure the objectives of national policy by the application of force or the threat of force.¹⁷ Yet even at the military strategy level the senior leader, senior staff officer, or strategist must have an understanding and appreciation of the systemic and comprehensive nature of strategy—military strategy cannot be developed without consideration of and integration with the other instruments of power and other strategies. SOF leaders, strategists, and SOF staff officers and noncommissioned officers working at the strategic level must be competent at the tactical and operational levels and grasp the relationship among the levels of war. While they sometimes work at the same levels as those involved in operational art, their focus is on strategy *proper*.

At the highest levels of strategic thinking, the U.S. Army War College places the individual in one of the three roles:

- a. *Strategic leader* provides vision, inspiration, organizational skills, direction, and personal leadership at the highest levels.
- b. *Strategic practitioner* develops strategy, translating broad policy guidance into integrated specific strategies that lead to policy success.
- c. *Strategic theorist* develops theories and concepts through study and thought and teaches and mentors others regarding the strategy and strategic thinking.

Each role requires a distinct set of skills and competencies that are developed through experience and study. A master of the strategic art is proficient in all three of these areas and may approach Clausewitz’s genius in the truest sense.¹⁸ *Strategists proper*—strategic practitioners—must be well founded in the understanding and application of strategic theory and its assumptions and premises, experienced in the strategic appraisal process, and able to develop and write strategy. Obviously the SOF community needs to develop and grow strategists proper who can develop proper strategies using both SOF and other capabilities, military and civilian. Other SOF personnel fall into roles where they must evaluate and execute strategy.¹⁹

Ultimately, SOF as a community should be seeking to develop SOF personnel who can function in all the realms of strategy as well as articulate to non-SOF personnel the SOF perspective in strategy. (See Figure 3 for a depiction of the realms of strategy and strategic thinking.) SOF requires personnel who can develop or play a role in the development of strategy proper at various levels and in various environments; execute strategy in the conduct of military operations, force development, and organizational undertakings; develop and articulate theory; and mentor and educate to sustain an effective

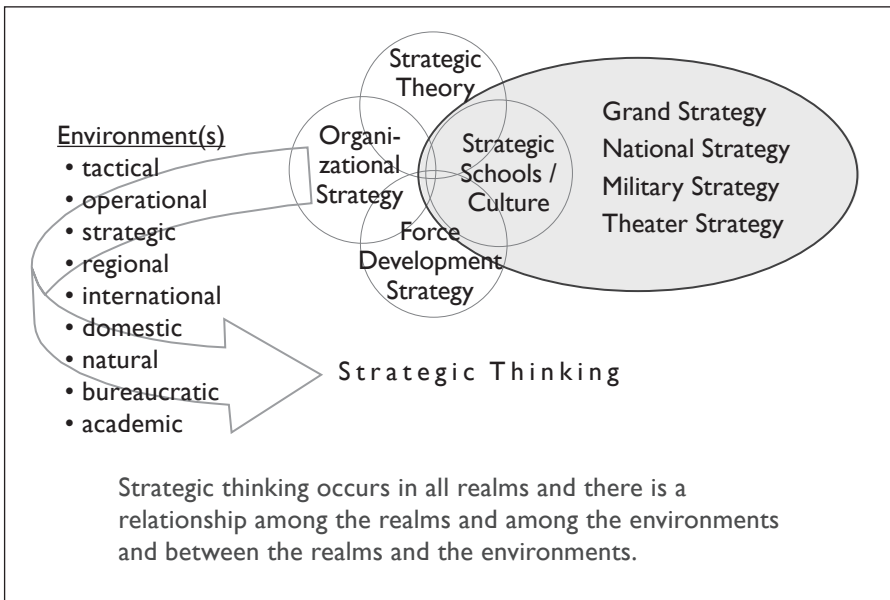


Figure 3. Realms of Strategy

SOF strategic culture. In addition, the SOF community should be concerned about providing an opportunity for non-SOF personnel to become knowledgeable in regard to the SOF orientation in strategy. Such knowledge facilitates understanding, integration, and support of SOF needs and initiatives in any of the realms of strategy.

Educating for Strategic Thinking

Educating SOF personnel is complicated by the inherently joint nature of SOF and the bifurcated responsibilities of USSOCOM and the services in regard to the professional development and career progression of personnel. It is also complicated by the lack of a well-articulated special operations school of strategy and a shared SOF theoretical construct for strategy. The SOF community has begun to make a concerted effort to intellectually move strategic thought beyond a cliché of “all SOF is strategic,” but current and future operational requirements remain a threat to progress.²⁰ All of these situations make an educational approach difficult, but USSOCOM’s role as a supported combatant command in the war on terrorism provides the impetus; and the Joint Special Operations University (JSOU), as a subordinate institution of USSOCOM, provides a logical proponent for the development of and education in SOF strategic thinking. JSOU should be able to research and design a school of strategy, develop an appropriate curriculum, and design a program to make learning available to those who require it. The outlines of such an approach are developed here.

The lack of a well-articulated, publicized, and generally accepted special operations strategic school of thought is problematic for SOF education. Without a Clausewitz (land power), Mahan (maritime power), or Douhet (airpower), SOF has no intellectual basis for a debate about what constitutes special operations strategic thought and how it must be modified for the current period.²¹ Such works, even though they are dated, provide a tradition from which current discussion can move forward. A SOF work would provide a common basis for communication within the community and a venue for those outside the community to understand special operations and its strategic role. This is not the same as saying those in the current community, or in the past, have not thought about or even articulated a school in some manner. It is merely pointing out that such intellec-

tual work is not readily available or generally recognized. It suggests that educators might need to identify such resources or, better still, research and publish a composite work that captures the essence of an American special operations school. Some of the thought is integrated in recent doctrine, but a coherent “school” provides the intellectual basis for thinking critically about SOF strategic thinking and its evolution. The essence or thesis might be “small numbers of highly talented and trained specialists, thinking innovatively and properly employed, can have positive strategic effects vastly disproportionate to their numbers and resources.” Such a school might also incorporate elements of the SOF truths, which represent a part of the foundation of SOF thinking. A composite work on a special operations school would prove this thesis and illustrate how, when, and why it works. Such a composite book is not a theoretical construct for understanding strategy in general, but a foundation for understanding the strategic role of special operations.

What to teach SOF personnel about strategy in general should be based on a shared SOF strategy theoretical construct. Such constructs already exist, but USSOCOM should pick a construct and modify it appropriately for the SOF world view, embellishing or modifying it with SOF vocabulary, concepts, and illustrations where appropriate, while recognizing

... USSOCOM should pick a construct and modify it appropriately for the SOF world view ...

SOF exists in a joint, interagency, and multinational environment. Its primary purpose is to educate SOF personnel in strategic thinking, allowing the community to communicate intelligently about strategy and its relationship to campaign planning and tactical operations, and to evaluate the merits of a particular strategy in the existing environment. Its secondary purpose is to inform others about SOF strategic thinking. Such a construct gives SOF both recognition and ownership—validating and reinforcing strategic thought within the community. The Army War College uses such a construct, and this author’s recent monograph, *Strategic Theory for the 21st Century: The Little Book on Big Strategy* illustrates this approach. A SOF “little book” would cover much of the same ground, perhaps with more examples and a significant emphasis on the SOF strategic thinking at the tactical and operational levels.

Once a common construct is adopted, what is taught at the different points in an individual's career is a function of the comprehension required for positions at that level and the amount of time and resources made available to develop the requisite competency—curricula are functions of need, resources, and student availability. While major curriculum components are broadly outlined in this monograph, they would need to be developed in much greater detail for specific courses. Other institutions have already addressed the curriculum requirements at the strategic and operational levels (e.g., Army War College and Command and General Staff College) and provide a logical point of departure for JSOU. Less has been done at the basic course levels of instruction for officers and noncommissioned officers because the typical service school sees little need. Yet this can be easily determined since the “little book” approach and the level of assignment projected for typical graduates allows definition of a logical effort of study from introductory to mastery. Existing literature, such as the monograph *Educating International Security Practitioners: Preparing to Face the Demands of the 21st Century International Security Environment*, provide data and models for also considering the levels of effort.²² Thus JSOU can develop SOF strategic thinking curricula for SOF personnel who will serve at the tactical, operational, or strategic levels; and these curriculums can be designed so that they can be integrated into a progressive professional development program. Delivery of the curriculums may well pose the larger obstacle.

SOF is by definition a joint force, composed of different service elements. Training and education of this force is accomplished by a combination of service institutions, service-specific special operations institutions, JSOU, and other joint institutions. The services largely control career progression and decide when service members attend service schools. SOF's unique organizational structure astride the services as a combatant command with Title 10 responsibilities (and a “community” as opposed to a service) is inherently problematic. SOF strategic thinking education requirements may not align with the service education models. Individuals may not attend intermediate- or senior-level education until after SOF assignments requiring the education. This issue can be overcome by the simple expedient of visualizing SOF strategic education as having its own basic, intermediate, senior, and strategist levels of education. (See Figure 4.)

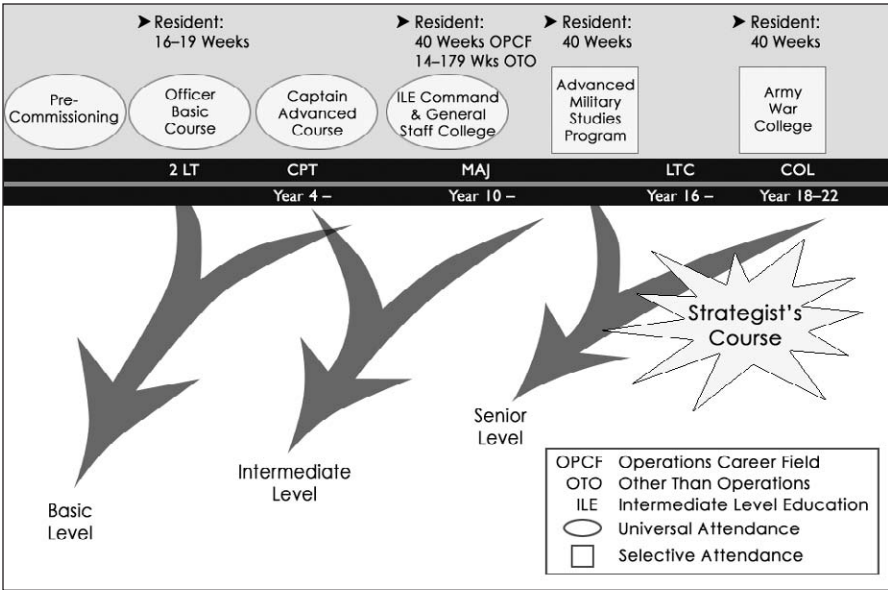


Figure 4. Army Active Component Officer Education System

In such a model SOF personnel can access the learning under career parameters that allow them earlier access than the normal service model might facilitate. Flexibility and redundancy of learning can be addressed by course design.

How are common curriculums to be delivered across different service systems and institutions that provide varying degrees of similar content at different times? This question suggests that JSOU will need to produce a variety of strategic study products for resident and nonresident use by JSOU and by an array of other training and educational institutions. This challenge can be confronted effectively by conceptualizing any level of course as being developed in several modes: stand-alone resident instruction, stand-alone distance learning, SOF supplement to existing resident strategy curriculum, and SOF supplement to existing distance-learning strategy curriculum. Adhering to this conceptual mode, an instructional designer can analyze guidance such as the “Officer Professional Military Education Policy (OPMEP)” and review service courses in order to design with consideration to essential first knowledge, reinforcement, and redundancy of content.²³ Such an array also gives options to individuals and institutions for their use. Understanding the complexity

of strategic studies is eased by multiple approaches to the subject; reinforcement is essential, making some degree of redundancy with service schools a positive attribute of the model. In this regard, attendance later at service professional military education (PME) or specialized strategy courses adds depth and context to the education of SOF personnel who have completed JSOU courses, and earlier attendance at such courses enhances JSOU instruction. In the former case it also offers an opportunity for SOF officers to better “educate” their contemporaries at service schools on SOF strategic thinking.

Another approach that facilitates or makes use of service PME programs is to use a modular design where “common knowledge” content is in modules that the student can test out of for credit. JSOU courses would be SOF centric, but not in an exclusive sense because USSOCOM responsibilities in the war on terrorism synergize conventional, SOF, multinational, and interagency capabilities—a requirement that will continue and expand. In addition, given the role and quality of noncommissioned officers (NCOs) in the SOF community, there probably is little need for content or design differences in officer and NCO courses. The community simply needs to determine which NCOs are required to take what levels and when—functions of a selection process, in which all are not selected at the higher levels. JSOU enjoys an excellent reputation for innovation in course design and methodologies, and the development and implementation issues are more apt to be resource and culturally focused as opposed to a lack of JSOU talent or inflexibility.

Using the levels of war, OPMEP, services’ experience and courses, and ideas advanced above, the course objectives and the desired graduate behavior of a SOF strategy education model can be described via the basic, intermediate, and senior levels.²⁴ Lesson objectives and content flow from the course objectives and desired behaviors. To clarify, the objectives are cumulative as a student passes through the levels over time—that is, the senior-level student is assumed to have mastered the basic and intermediate levels, and the junior courses are prerequisites to more senior ones. In reality, mastery of previous objectives is subordinated in the higher level of learning and always will have to be reviewed in order to proceed to new learning.

Basic Level. “SOF Strategic Thinking at the Tactical Level” would be a mandatory basic course in strategic thinking for SOF junior

officers and mid-level NCOs. Such a course introduces students to strategic theory and the concept of strategic thinking. It focuses on the relationship of tactics, operational art, and strategy and builds strategic awareness and appreciation by teaching students to consider multi-ordered effects of their actions and to recognize possible strategic opportunities. It does not seek to teach strategic appraisal or strategy formulation. The curriculum is offered in resident and nonresident formats. It would be taught at JSOU, exported for resident instruction at service-specific special operations schools, and offered online. All versions would include an evaluation module. Its anticipated duration is approximately 9 to 15 classroom hours or a distance-learning equivalent.²⁵

| Course Objectives | Behaviors |
|--|--|
| Understand the relationship among the levels of war and the role of tactics. | Demonstrates strategic appreciation and awareness. |
| Understand the SOF school(s) of strategy. | Plans and conducts tactical operations within the boundaries and in support of stated plans and strategy. |
| Understand the concepts of strategy theory and strategic thinking. | Understands strategic effects and strategic consequences and reports or applies initiative appropriately in conditions of uncertainty. |
| Distinguish the strategic role of SOF. | Recognizes and reports potential strategic opportunities at his level. |
| Appreciate the strategic roles of joint forces and the services. | Identifies the impact of the tactical environment on capability and makes recommendations. |

Intermediate Level. “Strategic Thinking at the Operational Level” would be an intermediate course in strategic thinking for majors, lieutenant colonels, and senior staff NCOs. At this level the course requires students to understand strategic theory and the concept of strategic thinking. It examines the relationship between campaign planning and strategy and builds strategic awareness by requiring students to plan for multi-ordered effects and provide for adaptability and flexibility in planning to account for adverse effects and to take advantage of strategic opportunities. It should also introduce the strategic appraisal and strategy formulation processes. The curriculum is offered in resident and nonresident formats. It should be taught at JSOU, exported for resident instruction at service-specific

special operations schools, exported to service intermediate schools as an elective, and offered online. All versions would include an evaluation module. Its duration is anticipated to be approximately 30 classroom hours or a distance-learning equivalent.

| Course Objectives | Behaviors |
|--|--|
| <p>Examine the SOF school(s) of strategy and its (their) relationship to other schools of strategy.</p> <p>Examine strategy theory and the relationship of strategy to planning.</p> <p>Understand the strategic appraisal process.</p> <p>Understand the strategy formulation process.</p> <p>Create effective campaign and organizational plans based on a given strategy.</p> <p>Compare and contrast the current and future strategic role of SOF with the strategic roles of joint forces and the services.</p> | <p>Demonstrates the ability to analyze and evaluate strategy in the different realms and develop detailed plans in support of a given strategy.</p> <p>Evaluates strategy for objectives, desired strategic effects, and planning guidance and boundaries relative to use of SOF and other forces.</p> <p>Plans SOF-specific operations or integrates SOF and other capabilities into operational plans.</p> <p>Creates campaign, contingency, and complex organizational plans.</p> <p>Assesses the probably and merit of strategic effects, strategic consequences, and strategic opportunity in planning and adapts planning as appropriate under conditions of uncertainty.</p> <p>Recommends allocation of resources.</p> <p>Develops and recommends measures of effectiveness and monitors accordingly.</p> <p>Identifies future force and capability needs and makes recommendations accordingly.</p> |

Senior Level. “SOF Strategic Thinking at the Strategic Level” would be a comprehensive course in strategic thinking for lieutenant colonels and colonels. Such a course requires students to analyze and evaluate strategic theory and the concept of strategic thinking. It examines the relationship among policy, strategy, and operations and the roles of SOF, military forces, and other agencies and actors. Students study the strategic appraisal and strategy formulation processes. The curriculum is offered in resident and nonresident formats. It would be taught at JSOU, exported for resident instruction at service-specific special operations schools, exported to service senior schools as an elective, and offered online. All versions would include an evaluation module. Its anticipated duration is approximately 30 classroom hours or a distance-learning equivalent.

| Course Objectives | Behaviors |
|---|--|
| <p>Assess the SOF school(s) of strategy and its (their) relationship to other schools of strategy for the current and future environments.</p> <p>Evaluate the SOF strategy theory construct and its value in assessing current strategies and formulating new strategies.</p> <p>Apply the strategic appraisal process.</p> <p>Apply the strategy formulation process.</p> <p>Assess policy and higher level strategy and guidance and construct strategy and planning guidance for the national military and theater levels of strategy.</p> <p>Evaluate the current and future strategic role of SOF relative to the strategic roles of joint forces and the services.</p> | <p>Demonstrates the ability to apply senior-level strategic thinking in periods of uncertainty and in the different realms of strategy and derive appropriate questions and guidance for development of strategy and supportive planning:</p> <ul style="list-style-type: none"> • Scans the strategic environment. • Evaluates national and higher strategies for appropriateness and institutional or organizational implications and critiques or applies appropriately. • Integrates SOF, conventional military, interagency, multinational, and nongovernmental components, and other aspects of power in service of national interests, policy, and strategy. • Provides strategy formulation and planning guidance. • Approves strategies and plans and supporting resources. • Approves and evaluates measures of effectiveness. • Decides future force and capability needs and priorities and promotes accordingly. |

Strategist Level. “The SOF Strategist Course” would be a comprehensive curriculum in strategic appraisal and the strategy formulation process offered to majors and lieutenant colonels. This course requires students to master strategic theory and the strategic appraisal and strategy formulation processes. The curriculum is offered in a resident or blended learning format. It contains a practical application and/or an internship. It would be taught only by JSOU and includes a certification process. Its duration would be approximately 120 classroom hours or an appropriate blended learning equivalent.

| Course Objectives | Behaviors |
|--|---|
| <p>Appraise the SOF school(s) of strategy and its (their) relationship to other schools of strategy for the current and future environments.</p> <p>Evaluate the SOF strategy theory construct and its value in assessing current strategies and formulating new strategies.</p> <p>Evaluate the strategic appraisal process.</p> <p>Evaluate the U.S. strategy formulation process.</p> <p>Construct SOF specific and joint and multi-national strategies in support of U.S. grand or national strategy.</p> <p>Defend the current and future strategic role of SOF relative to the strategic roles of joint forces and the services.</p> | <p>Demonstrates the ability to construct viable SOF specific, U.S., and coalition military and organizational strategies:</p> <ul style="list-style-type: none"> • Scans the strategic environment. • Evaluates national and higher strategies for appropriateness and institutional or organizational implications and makes appropriate recommendations. • Constructs or participates in construction of effective military and organizational strategies at national, coalition, interagency and military organization levels. • Integrates SOF capabilities in conventional strategies and integrates conventional, multi-national, and interagency capabilities into SOF proponent strategies. • Contributes to the SOF vision for the future. • Recommends future force and capability needs and priorities. • Recommends measures of effectiveness. |

Conclusion

In the end, this monograph makes a simple argument. The future is more chaotic and challenging than the past, and SOF must adapt for a greater strategic role. As globalization continues to change the nature of the international and domestic environments around the world, the U.S. will be confronted with a wide array of challenges to its national interests. While the services and conventional joint forces are still essential to the advancement of these interests, USSOCOM and the special operations community are more critical than ever to successful U.S. policy. SOF personnel at the tactical level will increasingly be on the forward edge of the strategic spear all around the world, and particularly at the points most threatening to U.S. interests in this new century. Most importantly, a SOF perspective in campaign planning and strategy formulation will be a significant strategic advantage in the 21st century. No longer can SOF focus on direct action or simply provide forces to the supported

combatant commander. USSOCOM, as a supported combatant command, develops strategy in support of national policy involving SOF, conventional U.S. military capabilities, and interagency and multinational resources. Equally important, a SOF perspective in strategy debates will help bridge the force structure issues with proactive and innovative concepts for policy success.

The educational proposal advanced in this paper can define what strategic thinking is within SOF and improve near-term individual and collective performance within the community. Over time, as SOF personnel move through the education system and apply strategic thinking in appropriate assignments, the cumulative effect will create greater depth and perspective in the special operations community's strategic competency, building a corps of effective leaders for the future and improving strategic performance in both SOF and conventional forces. As daunting as this task may appear on the front end, it can be accomplished relatively expeditiously and inexpensively. Now more than ever, USSOCOM must take the long-war view and use JSOU to inculcate and sustain a new strategic thinking into the SOF culture at all levels. ↑

Endnotes

1. General Bryan D. “Doug” Brown, “Meeting the Challenges of the 21st Century,” *Joint Force Quarterly* 40 (1st Quarter 2006):39.
2. Bradley Graham, “Shortfalls of Special Operations Command Are Cited,” *Washington Post*, 17 November 2005, A02.
3. George W. Bush, *The National Security Strategy of the United States of America* (Washington, DC: The White House, March 2006), i-ii. President Bush’s introductory letter states this explicitly and it is integrated throughout this national security strategy and the ones that preceded it. Seeing the war on terrorism as one manifestation of a global reaction to U.S. power is an interesting framework drawn from dialogue at the Joint Special Operations University First Annual Strategic Symposium, “Countering Global Insurgency” (2-4 May 2006).
4. Lieutenant Colonel Christopher P. Gehler, *Agile Leaders, Agile Institutions: Educating and Adaptive and Innovative Leaders for Today and Tomorrow* (Carlisle, PA: Strategic Studies Institute of the U.S. Army War College, August 2005) 3. This diagram is one commonly used in the DoD and also appears in the United States Army *2006 Posture Statement*, 10 February 2006.
5. Steven Metz and Raymond A. Millen, *Future War/Future Battlespace: The Strategic Role of American Landpower* (Carlisle, PA: Strategic Studies Institute, March 2003). See also Robert D. Kaplan, “Supremacy by Stealth,” *Atlantic Monthly*, July/August 2003. See also Colonel Thomas X. Hamas, *The Sling and the Stone: On War in the 21st Century* (St. Paul, Minnesota: Zenith Press, 2004). Abundant sources for deriving a future world view exist, and these represent a few used for this synthesis of the emerging challenges for the U.S. military during the period of transformation.
6. USSOCOM Internet home page, available from www.ussocom.mil/; accessed 23 April 2006. The actual language of the directive is “synchronize.”
7. Michael G. Vickers, director of Strategic Studies, Center for Strategic and Budgetary Assessments, “Special Operations Forces Capability, Capacity, and Posture Gaps for the Global War on Terrorism, Testimony before Committee on Armed Services Panel on Gaps—Terrorism and Radical Islam, United States House of Representatives (Washington, DC, 26 October 2005), 3-4. The Center for Strategic and Budgetary Assessments is a nonprofit think tank. The testimony is drawn from Michael G. Vickers, *Transforming U.S. Special Operations Forces* (Washington, DC: Center for Strategic and Budgetary Assessments, August 2005).
8. Michael G. Vickers, *Transforming U.S. Special Operations Forces*, OSD Net Assessment (Washington, DC: Center for Strategic and Budgetary Assessments, 26 October 2005), 35.

9. Linda Robinson, "Men on a Mission," *U.S. News & World Report*, 11 September 2006, 36-38. Ms. Robinson chronicles a part of the continuing debate, characterizing it as both a cultural and policy debate.
10. In the author's view any arguments about the relative merits of service versus SOF competency is somewhat a red herring. All need to improve, and the focus of this paper is what are the SOF issues and what can the community do to meet the needs of the 21st century.
11. Brown, 40.
12. John D. Gresham, "Transformation at the John F. Kennedy Special Warfare Center and School," *The Year in Special Operations* (Tampa, FL: Fairmont LLC, 2005), 107-110. This article illustrates one current change in training and education to more rapidly train special operations personnel.
13. Brown, 40-41.
14. Department of Defense Dictionary of Military and Associated Terms, available from www.dtic.mil/doctrine/jel/doddict/data/t/05292.html; accessed 22 April 2006.
15. Ibid.
16. Harry R. Yarger, *Strategic Theory for the 21st Century: The Little Book on Big Strategy* (Carlisle, PA: Strategic Studies Institute, February 2006), 47-48.
17. Department of Defense Dictionary of Military and Associated Terms.
18. MG Richard A. Chilcoat, *Strategic Art: The New Discipline for the 21st Century* (Carlisle, PA: Strategic Studies Institute, 1995), 6-9.
19. Yarger, 3.
20. The commander, USSOCOM, has focused on this point, and it is reflected in such efforts as the SOF Leadership Competencies Study, 2006.
21. Carl von Clausewitz, *On War*, edited and translated by Michael Howard and Peter Paret (Princeton: Princeton University Press, 1976). A.T. Mahan, *The Influence of Seapower upon History, 1660-1783* (Boston: Little and Brown, 1890). Giulio Douhet, *The Command of the Air*, trans. Dino Ferarri, 1927 ed. (Washington, DC: Office of Air Force History, 1983). Such works help define even today's debates.
22. James M. Smith, et al., *Educating International Security Practitioners: Preparing to Face the Demands of the 21st Century International Security Environment* (Carlisle, PA: Strategic Studies Institute, July 2001).
23. Chairman Joint Chiefs of Staff, "Officer Professional Military Education Policy (OPMEP)," Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 1800.01C (Washington, DC: Joint Staff, 22 December 2005).
24. The author participated in the 5th Annual SOF Education Conference, 27-29 June 2006, as a member of the Vision and Strategy Competency Working Group as JSOU explored the educational implications of the SOF Leadership Competency Model. This monograph considers and incorporates as the author sees appropriate the draft results of

the conference, but does not represent or accurately reflect a JSOU position.

25. Classroom hours are supported by adequate periods of study before the class, thus the time is greater than portrayed here. Actual hours would be determined through an instructional design process based on what USSOCOM wanted to achieve. Here, as an instructor in strategy, the author determined what time he would allocate to “teach” to the objectives.

