21st Century Expeditionary Mindset and Core Values: A Review of the Literature

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Abstract

This paper reviews literature on the expeditionary mindset and core values taking into account the 21st century security and technology environments. The first part of the paper develops the historical context and provides definitions. Next, the paper explores the connection between the expeditionary mindset and military transformation. Key tenets of the 21st century expeditionary mindset are identified and examined. Soldiers with an expeditionary mindset should first, be mentally prepared to deploy on short notice anywhere in the world; second, have the critical-thinking skills necessary to adapt quickly to a changing operational environment; third, work cooperatively with members of a Joint team; fourth, posses knowledge of the culture in the area of the local populace, and; fifth, the expeditionary force will be using 21st century network centric technology. The paper concludes with a discussion of military core values within the context of an expeditionary mindset.

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Soldiers with a joint and expeditionary mindset will be confident that they are organized, trained, and equipped to go anywhere in the world, at any time, in any environment, against any adversary, to accomplish the assigned mission
Brownlee & Shoemaker (2004, 10)[1]

Introduction

This paper reviews key literature on the expeditionary mindset and core values taking into account the 21st century security and technology environments. The first part of the paper develops the historical context and provides definitions. Next, the paper explores the connection between the expeditionary mindset and military transformation. Finally, core values are considered within the context of the expeditionary mindset.

Historical Context: US Marines and Small Wars

As with most ideas, the expeditionary mindset is not new. For example, the British expeditionary forces during 19th and 20th century excelled at small-unit, anti-guerrilla warfare (Cassidy 2005; Mockaitis, 1990). Their organization and culture reflected an expeditionary mindset. Nevertheless, the US Marines 1940 *Small Wars Manual* is a key document generally considered a starting place to examine contemporary notions of the expeditionary force and expeditionary mindset[2].

Unlike large scale state-versus-state war, "small wars are operations undertaken under executive authority, wherein military force is combined with diplomatic pressure in the internal or external affairs of another state whose government is unstable, inadequate, or unsatisfactory for the preservation of life and of such interests as are determined by the foreign policy of our nation" (U. S. Marines 1940, 1). During early 20th century engagements in Haiti, Nicaragua and

[1] At the time, Brownlee was Acting Secretary of the US Army and Schoomaker the Chief of Staff of the US Army.
[2] See for example Booth (2003); Cassidy (2004, 2006); and Melillo (2006).

the Dominican Republic the Marines learned that small wars presented "no defined or linear battle area and theater of operations" (Cassidy 2004, 79). Further, unlike major wars where single-minded hatred of the enemy serves to instill courage, "in small wars, tolerance, sympathy, and kindness should be the keynote" of troop relationships with the mass of the population (US Marines 1940, 32).

During the Cold War the United States security policy shifted almost totally toward conventional large-scale conflict. The insights of the *Small Wars Manual* were almost forgotten. World events changed and military leaders now see the value of the small wars approach for counterinsurgency, stability and support operations, peacekeeping and humanitarian missions. These operations are characterized by asymmetric conflict and, outcomes are described as "success" rather than "victory" (Melillo 2006, 26). How did a way of thinking about war, which was diminished during most of the 20th century, become so important in the early 21st century? The changing security environment is critical to its rise in prominence (Hammes, 2005).

20th Century Security Context

During the first part of the 20th century Western societies used mass armies to defend against enemy invasion and safeguard the homeland. The Cold War dominated the second half of the 20th century. Here nuclear war loomed as the major threat. Large militaries were used to support the alliance (Moskos 2000, 15). For the United States "preparation to fight and win world wars was the primary mission of the military" (Burk, 2005, 39).[3] Victory in this environment required a 'big war' or 'garrison' mindset – a hierarchal, rigid, dogmatic way of thinking that valued technical know-how and expected obedience to orders from those at the end of the chain of command (Paparone and Reed 2008). According to Schmidtchen (2006) these

[3] It should be noted that the Vietnam War really did not fit this pattern.

platform centric militaries used the platoon as the critical operating unit and basis of infantry tactics. Information was provided on a need-to-know basis (Schmidtchen, 2006). Junior officer discretion, much less that of the enlisted soldier, was minimized. "For most of the 20th century, the US military culture (notwithstanding the Marines' work in small wars) generally embraced the big conventional war paradigm and fundamentally eschewed small wars and insurgencies" (Cassidy 2004, 75).

After the Vietnam War the US military eliminated the draft and moved to a volunteer or professional force. Europe, on the other hand, maintained conscript forces that were designed to defend the homeland (Moelker, 2005). The end of the Cold War (late 1980s) ushered in a recognition that militaries were taking on a new Post-Modern character (Moskos et al, 2000). New missions such as peacekeeping and humanitarian operations took on more prominence. Slowly, European militaries responded by reducing reliance on the draft and developing a more professional force (Moelker, 2005). The Marine's *Small Wars Manual*, however, was still a dusty document seemingly without relevance.

21st Century Security Context

The events of September 11, 2001 and the subsequent wars in Iraq and Afghanistan changed all that. US military and political leaders recognized that a new view of war and way of thinking was needed.[4] Increasingly the conflicts (Iraq, Afghanistan) and new functions/missions (peacekeeping, humanitarian, stability operations) meant militaries traveled to remote locations and found themselves in asymmetric threat environments. States confronted non-state adversaries who did not employ regular forces. Some states fought elusive terrorists and

[4] See Melillo (2006); Schmitdchen (2006); Moskos et al (2000).

complicated counterinsurgencies. Other military's were managing the peace while facing militias, warlord armies, terrorist organizations, and criminal groups. All of this was done in an environment where security organizations of all types worked together toward a common goal.

Robert Taber's (1965) *The War of the Flea: Guerrilla Warfare in Theory and Practice* provides a flea/dog metaphor to capture the relationship between insurgency and great power. The dog is disadvantaged because there is too much area to defend, and the enemy is too tiny, ubiquitous and agile. Cassidy (2004, 83) argues that lessons from fighting the "elusive guerrilla show that with the right mindset and with some knowledge of the aforementioned methods, the war of the flea is in fact winnable." Hence, the US should develop a mindset "that places more emphasis on stability operations and counterinsurgency." The US is working on ways to restructure into smaller more dynamic units to enhance strategic responsiveness (Bonin and Crisco, 2004).

Meanwhile in Europe, the armed forces went through a wave of modularization, flexibilization and a simultaneous, comprehensive professionalization**.** Reaction times were "shortened by a higher degree of readiness, while the capability for spatially extended operations of parts of the armed forces" increased. (Haltiner and Klein 2005, 9). "Peacekeeping and peace enforcing became the key tasks in practice" (Moelker 2005, 48). There was also recognition that a rigid warrior identity among peacekeepers created problems.[5] These experiences led Europe forces to more closely resemble many elements of an expeditionary force. A new more flexible mindset was needed to accompany the changing security/operational environment.

Defining the Expeditionary Mindset

[5] Traditional soldiers skills are still important – but if the warrior persona rigidly dominates misconduct among peacekeepers is higher (Moelker, 2005, 51). Winslow (1998, 350) discusses the problems with 'mechanical solidarity' among Canadian Peacekeepers. Although this article looked at the relationships between soldiers, it highlighted the problems of ridged or "mechanical" thinking.

This expeditionary mindset is epitomized by the phrase "bags packed" – that is ready and willing to deploy on a moment's notice, any time, to any place, to perform any mission. (US Marines 1998, 43)

There is widespread recognition that contemporary security and technology changes require a different less rigid military mindset. Michael Melillo (2006, 27) describes it as a change from "big war" thinking (conventional mindset) to "small war" thinking (expeditionary mindset). Cassidy (2004, 74-75) defines a military mindset as the "embedded beliefs and attitudes within a military organization that shape that organization's preferences on when and how the military instrument should be used." From this perspective (organizational level), mindset is akin to culture. Cassidy (2004, 74-75) uses the two terms (culture/mindset) interchangeably. At the individual or small group level, the expeditionary mindset refers to how people think or the set of thinking skills and mental orientations (mindset) soldiers and their leaders need to succeed in the expeditionary environment.[6] Authors who discuss either view (organizational, unit/individual) of the expeditionary mindset emphasize the need to transform the thinking and behavior of people and organizations to better meet 21st century security challenges and missions.

Robert Cassidy (2005, 56) maintains British small wars experience provides useful insights into how contemporary military organizations should be transformed. "The British approached insurgency with the critical assumption that insurgency was not principally a military problem. If required, Britain would bring soldiers to back up the police," soldiers should always aid civil power and should use only the level of force "essential to restore order and to never exceed that level of force." Thus, it was essential to cooperate with and win the support of the population. This generally meant that small units should be deployed on an area basis with

6 Michael Arnold (2007) considers the expeditionary mindset almost exclusively from the technological perspective. He is concerned that an organizational focus (mindset) on "mobility enhancing technologies" could divert attention from crucial training in language, counterinsurgency, and cultural awareness.

"decentralized command and control." Hence, junior officer initiative and the ability to build linkages to the population were critical to success.

Because most expeditionary missions require that branches of the military work together with other branches many US scholars and practitioners in the United States have combined the concepts of expeditionary with jointness. According to Richard Swain (2005, 177) the term *joint and expeditionary* mindset means simply a "fixed philosophical resolve that the individual and armed services' contributions to national defense will occur in an interservice context based on overseas deployment of forces with relatively circumscribed missions." Two governing assumptions are reflected in this definition: 1) "all military operations in the departments committed together in a common enterprise under command of a uniformed national commander whose branch of service is essentially immaterial," and 2) most "military conflicts will involve strategic or operational deployment on short notice from the continental United States or bases overseas at strategic distance from the theater of operations, with the expectation that forces will fight a highly dispersed, three dimensional battle on the entry, under conditions of austere support." Time and space are emphasized. Soldiers and the institutions that support them should be ready to deploy "on short notice" or they should be "organized, trained and equipped to go… at any time." Further, they should be ready to go "anywhere in the world" or "overseas at strategic distances from the theater of operation."[7]

Transformed Expeditionary Force

> *A Joint and Expeditionary Mindset…is the lens through which we view our service. We must be mobile, strategically deployable and prepared for decisive operations whenever and wherever required. We must be lethal and fully interoperable with other components and our*

[7] Another way to explore the meaning of an expeditionary mindset and core values is through what it is not. Hajjar and Ender (2005) examine the "McDonalization" of the US military and identify traits like efficiency, calculability, predictability and control as characteristics common to McDonalized organizations and problematic for an expeditionary force. The "one-size fits all" way of thinking and organizing is ill suited to a force that needs to go anywhere at short notice and engage in activities that vary from warfighting to humanitarian relief.

allies, as well as flexible, informed, proactive, responsive and totally integrated into the joint, interagency and multinational context (US Army 2004).

While the above definitions vary in their emphasis, there is a *common* implication for the 21st century security environment. Military institutions should transform from big war to small war thinking at the organizational and individual/unit levels. Menaker et al (2006, iii) identify four characteristics that capture the essence of this mindset (organizational and human) transformation. Soldiers with an expeditionary mindset should first, be "mentally prepared to deploy anywhere in the world on short notice," second, have "the critical-thinking skills to adapt quickly to a rapidly changing operational environment", third, appreciate and work "cooperatively with other members of a Joint team," and fourth, posses "sufficient knowledge of the culture in the area of operation to be able to interact with the local populace." In addition, this expeditionary force will be using 21st century network centric technology that also requires a mindset adjustment. Mindset transformations needed to achieve a way of thinking compatible with network centric technology are similar to those needed for an expeditionary mindset. Hence, facility with and implications of Network Centric Warfare technology are identified as a fifth key aspect of the mindset of successful expeditionary forces (Schmidtchen, 2006).

Mentally Prepared to Deploy at Short Notice

Expeditionary operations require physical agility or "the ability to rapidly shift forces and efforts across the globe in order to apply force at the time and place" (Briggs 2007, 2). The ability to do this rests upon mental as well as physical/organizational agility. Hence, soldiers should be mentally prepared to deploy at short notice. This ready-to-go mental agility is known as *cognitive readiness*. "Cognitive readiness refers to the mental preparedness to perform a mission and to exploit opportunities as they arise." It involves "anticipation, planning, initiative,

the integration of reason and emotion, and self-synchronization" (Menaker et al 2006, 4). Cognitive readiness ensures that the soldier is mentally prepared to accomplish the mission, performs at an optimal level, and "uses the most effective and affordable tools and techniques" (Etter et al, 2000, 5).

Menaker et al (2006) identify *self-efficacy, operational cultural awareness, and resilience* as key components of cognitive readiness.[8] *Self-efficacy* is a person's belief in his "capability to exercise some measure of control" over his own "functioning and over environmental events." Unless soldiers "believe they can produce desired results and forestall detrimental ones by their actions" they have little reason to act or persevere in the face of hardships. (Bandura 2001, 10)[9] Self-efficacy can be diminished by the stress of deployment, hence a mentally prepared soldier uses "reflection to recognize and compensate for the negative effect of anxiety or stress on self-efficacy" (Menaker et al. 2006. p. 7).

Resilience, or the "ability to recover from or adjust easily to misfortune or change" is another pillar of cognitive agility *(*Merriam Webster 2009*).* A resilient soldier is hardy and, has developed the "coping strategies to maintain optimal performance" by reducing susceptibility to traumatic situations (e.g., witnessing the death of a friend, sustaining a wound) or operational stressors (e.g., environmental extremes, dehydration, sleep deprivation) (Menaker et al 2006, 8). The dynamic process of *resilience* includes positive adaptation to significant adversity. Resilience allows soldiers to maintain a team focus, operational effectiveness and battlefield awareness, while under "stress and in response to harrowing events" (Menaker et al 2006, 8).

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[8] They also identify Critical Value determination or the ability to perform thought experiments or imagine future consequences of a given action (Menaker et al 2006, 8)

[9] For more on the concept of self-efficacy see Bandura (1997).

Operational cultural awareness, another pillar of cognitive agility, is the "knowledge of and sensitivity to the cultural norms of the population in the operational environment." When soldier has this skill she can "distinguish between warfighting and nation building in terms of the warfighters role"(Menaker et al 2006, 7).

Critical Thinking Skills to Adapt Changing Environment

Soldiers should not only be able to recognize when warfighting or peacekeeping activities are needed. They should also be able to mentally adapt to the continuum of environments they may confront. Hence, and expeditionary mindset is flexible and, it has the ability to shift within seemingly contradictory roles such as warrior and peacekeeper. Wong and Snider (2005, 613) describe this mental adaptability as mental agility, or the "ability to recognize change in the environment; to determine what is new, what must be learned to be effective and includes the learning process that follows that determination."

John Burpo (2006) uses the analogy of a cook and a chef to clarify the kind of mental agility needed for an expeditionary mindset. A cook knows how to follow a recipe a chef takes the ingredients available and makes a meal. The chef is a creative problem solver, comfortable with uncertainty. An expeditionary team needs the mindset of the chef – a chef that makes meals in dangerous, sparse, uncomfortable, messy environments. Drawing on the cooking theme, Whiffen (2007, 109) claims, "the recipe for success in stability operations depends on embracing the possibilities created by the changing environment."

According to Menaker et al (2006) the ability to adapt to a rapidly changing environment involves three subordinate constructs: *Strategic intuition, metacognitive capability and human agency*. "Strategic intuition is the use of creative insight to make decisions in time-constrained

conditions when circumstances require immediate decisions." [10] These creative insights make possible quick and effective decisions based on recognizing key patterns in fluid situations (Menaker et al 2006, p.8-9). *Metacognitive capability* enables reflection on one's sense of personal efficacy, and the adequacy of one's thought and actions' (Bandua 2001). Ideally, thoughtful reflection on actual experiences facilitates understanding of what happened, why it happened, assessment of the consequences, and determination of what "could have been done better." Soldiers use their metacognitive capability to learn from experience, which gives them the capacity to adapt (Menaker et al 2006, 9). (Key reflective thought!)

Metacognitive capability is linked to the third construct of adaptability – *Human agency*. Human agency is the ability of individuals and groups to draw upon past experience and knowledge to understand "their immediate environment and to react constructively to new situations by setting goals, anticipating the probable consequences of prospective actions within the environment and planning courses of action" that should lead to desired outcomes and avoid problematic ones (Menaker et al 2006, 9). It incorporates intentionality, forethought, self-reflection and self-reaction and enables soldiers to evaluate a situation and respond appropriately (Bendura 2001).[11]

Expeditionary forces must have ready-to-go *leaders*, and these leaders must be able to adapt and demonstrate mental agility. "Mental agility builds on the ability to scan and adjust learning based on the environment… Officers with mental agility search for more information and spend more time interpreting it. They also analyze large amounts of sometimes conflicting

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10 "The traditional duality between analysis and intuition dissolves in a new model of the brain, in which "… analysis puts elements into your brain and intuition pulls them out and combines them into action" (Duggan 2005, v). Creative insight is "The ability to take existing pieces of information and combine them in novel ways that lead to greater understanding and suggest new behaviors and responses (Stickgold a& Walker as cited in Duggan 2005, 1).

11 For a comprehensive overview of human agency theory see Bandura (2001).

information, trying to understand why things happen and identify possible courses of action to change events" (Wong and Snider 2005, 613).[12]

John Burpo (2006, 66-67) has summarized the traits of the adaptive leader. They include the ability to: 1) be decisive; 2) balance people and technology; 3) be comfortable with uncertainty; 4) learn quickly; 5) facilitate initiative and intent in followers; 6) communicate effectively; 7) understand how to use force across the spectrum of conflict; 8) be creative; 9) be curious and open minded; 10) maintain a problems solving orientation; 11) foster teams that can innovate and 12) be a life long learner. Mellio (2006, 32) notes that in small wars "the complexity and irregular nature of the conflict places a premium on small-unit leaders who possess the resourcefulness, initiative, and determination to succeed on the battlefield fraught with uncertainty and where the only certainty is ambiguity."[13]

According to Paprone and Reed (2008) the adaptive leader avoids dogma and dogmatic simplification when encountering a problematic situation. They emphasize the importance of reflection. "The professional that reflects-in-action pays attention to, and acts on, the environment through paradoxical use of divergent accommodative, and convergent forms of knowledge, especially when assimilative knowledge does not seem to be working" (Paparone and Reed 2008, 70). These leaders are akin to "researchers-in-action."

Complex 21st century missions require military organizations to plan in a way that allows for flexibility and adaptability. Hubba Wass de Czege (2009, 2-3) identifies the early stages of planning as a key function of the process. He distinguishes between design and planning.

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12 For more on adaptive leadership see Whiffen (2007).

13 "The complexity, unpredictability, and ambiguity of postwar Iraq is producing a cohort of innovative, confident, and adaptable junior officers" (Wong, 2004, p.v). Future leaders need to be adaptive and self-aware. "Adaptive capacity allows leaders to respond quickly and intelligently to constant change" (Wong, 2004, p.2).

"Design sets the problem to be solved, planning solves the problem as it is set." Both involve inquiry. The all important ability to balance design and planning is a type of battalion level operational art that focuses attention on inquiry, learning and quick adaption to change." He stresses the importance of flexible thinking and the need to avoid conceptual rigidity (Wass de Czege, 2009, 2-3). Of the two (design or planning), Wass de Czege argues the military has not spent enough time figuring out what the problem is. Design is missing (Wass de Czege, 2009, 6). A key insight for the expeditionary mindset is that a rigid beginning and end state now become fluid. "There is no beginning and no end state. The idea of 'end state' makes little sense in this context. There is a currently provisional desired state, one now believed desirable based on what is known... What is actually attainable inevitably changes as more is known. …success depends on learning and adapting more rapidly than rivals in the ecosystem" (Wass de Czege, 2009, 4). [14]

A person with an expeditionary mindset is a cooperative problem solver able to recognize changes in the environment and respond accordingly.[15] "Only soldiers with a mind that is socialized and educated to shift quickly from a 'warrior' kind of personality to an 'humanitarian' kind of personality are able to function in both peace support operations and combat" (Moelker 2005, p.53).

Works Cooperatively with Joint Team

The expeditionary environment is a joint environment. The notion of jointness encompasses multiple branches of services, other governmental organizations (e.g., State Department), non-governmental organizations (UN), private contractors, academic consultants and the militaries of many nations. Thus the military professional operates in a "multi-

[14] Many of the ideas discussed in this section are more fully developed in Dewey (1910, 1938).
[15] See Shields (2003, 2008) for a model of cooperative problem solving known as the "community of inquiry." It is based on the ideas of John Dewey and Jane Addams.

professional workplace" (Burk 2005, 51; Krawchuk 2008). The management of defense and peace requires cooperation as a mainstay of professional expertise. Hence, cooperation emerges as an important component of an expeditionary mindset. Officers in this environment "can see perspectives outside his or her own boundaries." They are able to understand, anticipate, and empathized "with the values, assumptions, and norms of other groups, organizations, and nations" (Wong and Snider, 2005, 615).

The meaning of cooperation is often refined through the notion of *interoperability* or "the ability of systems, units, or forces to provide and accept services from other systems, units, or forces and to use the services so exchanged to enable them to operate effectively together" (Menaker et al 2006, 4). Interoperability has three subordinate constructs: *shared cognition, joint/coalition cultural awareness* and *ability to maintain a team focus.* "Shared cognition is an intellectual process engaged in by members of a team in order to gain '…overlapping, similar, identical, complementary [sic], or distributed' knowledge, as well as the resulting knowledge gained through this process" (Hopp, Smith, & Hayne, as cited in Meaker et al 2006). Ideally, "shared cognition results in shared mental models", which enable teams to develop explanations and expectations suited to the task, and "in turn, to coordinate their actions and adapt their behavior to demands of the task and other team members" (Cannon-Bowers, Salas, & Convers, 1993, 228)[16].

Joint/Coalition cultural awareness involves knowledge and sensitivity to the cultural norms of Coalition and Joint partners. Each organizational culture is unique and varies according to leadership style, roles, missions, procurement philosophy, and member's attitudes and behaviors (Menaker et al 2006, 6). Interoperability is enhanced when cultural knowledge and

16 For additional references to shared cognition see Ensley and Pearce (2001) and Klimoski and Mohammed (1994).

understanding of the "Joint and Coalition partners minimizes culture-related conflict and enhances cooperation" (Menaker et al 2006, 6).

The *ability to maintain a team focus* incorporates three components, 1) realization of the teams potential; 2) "knowledge and appreciation of individual members roles and specialized knowledge and skills; 3) the commitment to share information and operate collaboratively" to accomplish the mission. The joint or coalition team includes individuals from different services/countries that have different traditions, expectations and abilities. Recreating a cohesive team that incorporates people from different countries or services is critical to interoperability. (Menaker et al 2006, 6).

According to Swain (2005, 185) managing joint interdependence requires a new way of thinking (mindset), a comprehensive perspective that fits together the entire force, and that takes into account the big picture, rather than focusing on a narrow set of orders or rigid short term objectives. It requires, "abandoning the view that one's service is separate, totally autonomous profession, and viewing it instead as an integral part of a wider whole."

Paprone and Reed (2008, 70) propose a military doctrine that refocuses the professional community on open, reflective collaborative inquiry and not on convenient accepted 'best practices' or mythology passed down by authority and accepted without thought. "Relying on the dogma of received wisdom" can lead to chauvinism, which is unproductive in a collaborative environment. Collaborative reflection-in-action leads to a culture that values learning more than knowing.[17]

[17] Krawchuk (2008, 68) discusses the development of integrated collaborative, multidisciplinary teams. The purpose of the teams is to establish "strategic 'think-act-reflect' capability."

According to Haltiner and Klein (2005, 12) "the new trans-national defense strategy demands flexible organization structures." They suggest using the modular principle of organization. "Modules are standardized organization units that are easily interchangeable within a system. This module-principle allows for the creation of internationally interoperable task forces at relatively short notice. These units, mostly on brigade level, fulfill the growing demand for multi-functionality and are able to operate quickly and relatively autonomously."

The expeditionary mindset requires soldiers to bridge organizational and cultural differences within the force they are forging. The expeditionary force travels to far-flung locations. Success in this environment requires knowledge of the local population and its culture. Hence, the need to cooperate and be flexible extends to the external environment too.

Knowledge of Culture of Local Population[18]

Without knowledge of the local population and culture it is almost impossible to function much less to lead across cultures (Whiffen, 2007). Wong and Snider (2005, 615) refer to this knowledge as "cross cultural savvy" or the ability to understand cultures across organizational, religious, economic, societal, political and geographic boundaries. Language competence is a kind of prerequisite for cross-cultural savvy (Burpo 2006, 69). Aside from language, local cultural awareness includes 1) knowledge of cultural heritage and history of the mission area; 2) knowledge of local customs, mentality and do's and don'ts; and 3) skills needed to communicate with all parties (Gooren, 2006, 57).[19] The Dutch tell their soldiers "culture is never one-

18 The 2009 *US Army Stability Operations Field Manual* identifies cultural astuteness among the force as critical to the conflict transformations necessary for success.

19 Donna Bridges and Debbie Horsfall (2009) argue that peacekeeping forces with a greater percent of women are better able to achieve trust among local populations and thus enhance overall communications. An Expeditionary mindset is not a "male" mindset.

dimensional, black or white, or unchangeable." As much as possible they "seek to prevent soldiers from forming simplistic stereotypes about the host nation" (Gooren, 2006, 59).

Menaker et al (2006,10) describe knowledge of the local population as a type of human intelligence capability. They identify two subordinate constructs associated with human intelligence capability, *social intelligence* and *situational awareness*. *Social intelligence* is the "ability to get along with people, to be at ease in society, knowledgeable of social matters." Social intelligence in a foreign culture is difficult to attain but essential. An expeditionary team member with social intelligence can use observations and interactions with the local community to resolve problems.

If the expeditionary mindset incorporates creativity in problem solving (above), one must be able to make sense of the "problematic situation." The problematic situation cannot be separated from local culture. Scholars have borrowed a concept most commonly used in aviation *situational awareness* to make sense of incorporating cultural knowledge and awareness as team members confront problems (Clark, 2007, 72). Situational awareness[20] the other tenet of human intelligence incorporates how accurately perceptions of a current environment mirror reality. It includes examining the situation, adjusting perceptions as incoming information changes and recognizing biases that might distort an assessment of the situation. Factors that can reduce situational awareness include insufficient communication (language skills key), stress, fatigue, task overload and task underload. (Menaker et al 2006, 10).[21]

Thomas Clark (2007, 72) examines the role of situational awareness and a related concept situational understanding in problem solving. Situational awareness in problem solving frames

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20 Endsley (1998, 97) defines situational awareness as "the perception of the elements in the environment within a volume of time and space, the comprehension of their meaning and the projection of their status in the near future."
21 Marr et al (2008) recommend Human Terrain Mapping as a useful way to gather knowledge of the local populations.

the important factors "to set parameters for in-depth analysis." The analysis should lead to situational understanding, or a frame that describes the "relationships between and among important factors in order to determine the implications of what is happening" and predict future events. From the expeditionary mindset perspective, the local culture must be incorporated into situational awareness if an accurate sense of situational understanding and problem resolution are to occur.[22]

Aside from cultural considerations, expeditionary soldiers use 21st century information age technology. The next section briefly explores the similarities between mindset issues generated by technological change and by the new expeditionary missions.

Network Centric Warfare

Technological change is reinforcing the need for many of the transformations in mindset that the new security environment suggests. These technological innovations are often summarized by the term Network Centric Warfare (NCW). The focus is on the change from a stable platform technology (mainframe) to networked dispersed force. According to Albert et al (1999, 88) "Network Centric Warfare focuses on the combat power that can be generated from

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[22] After reviewing the literature on the expeditionary mindset one cannot but think of Eva Johansson's (1996) picture of the somewhat overwhelmed ideal peacekeeper. Moelker (2005) describes the contemporary soldier as potentially schizophrenic. How is it possible to do all of the above things?
It seems to me there is just too much to hold in one's head about how to make this ideal happen. Is there a way to wrap the expeditionary mindset concepts into something easier to understand and remember and perhaps linked to a larger philosophy? I believe there is.
Most of the tenets of the expeditionary mindset closely mirror the pragmatism of John Dewey, Charles Sanders Peirce, William James and Jane Addams. Philosopher, psychiatrist David Brendel (2006) has summarized these ideas in an easy to remember framework (practical, pluralistic, participatory and provisional – the 4 P's). He applied this framework to an intellectual riff in psychiatry. Applied here, the expeditionary mindset takes into account *practical* problems. Soldiers are expected to use critical thinking skills and act to address problematic situations. In the process of dealing with the practical problems they incorporate the diverse views of the joint partners and community members or their perspective is *pluralistic*. They incorporate these views by listening and engaging in cooperative/collaborative efforts. The process is *participatory*. Finally, because uncertainty permeates the problematic situation/actions, there is no guarantee actions will work to address the problem. The must be flexible and able to adapt. Hence, the approach is *provisional*. By using these four constructs, I was able to summarize the expeditionary mindset in a paragraph and attach it to a sophisticated philosophy (classical pragmatism). Brendel's framework may be a useful tool to distil the essence of the expeditionary mindset. See Shields (2008) for more applications of Brendel's four "Ps".

linking or networking of the warfighting enterprise. It is characterized by the ability of geographically dispersed forces to create a high level of shared battlespace awareness that can be exploited via self-synchronization." Albert et al (1999, 85) also claim it provides a "new conceptual framework with which to examine missions, operations and organization."

NCW enhances collaboration by using advances in communications and computing technology. "NCW is based on adopting a new way of thinking – network-centric thinking and applying it to military operations." (Schmidchen 2006, 3). Schmidchen (2006) calls for a new image of the soldier in these circumstances and uses the term *strategic private* to capture the way NCW flattens an organization's ability to deliver information. The defining characteristics of NCW (precision, speed, knowledge, and innovation) reflect the connectivity of globalization (Schmidtchen 2006, 15). The increased connectivity changes the way people access information. The knowledge needed by the networked force requires increased "individual learning intensity." One implication of the networked terrorist enemy is that 21st century Western military organizations should move from employing "principles of a 'library culture' to those of an 'information retrieval' culture." A library culture prevails in poorly connected environment. "Experts carefully select and verify that authenticity of stored information" as well as set up protocols to classify information. Within this information hierarchy, "authenticity, permanence, and meaning" are emphasized. (Schmidtchen 2006, 144-146).

Vertically integrated management hierarchies common to most modern militaries employ organizational schemes that reinforce the 'library culture' view of knowledge management." Behavioral routines and tasks are simplified. Access to information is controlled by the 'need to know' principle and in this way – they reduce the uncertainty and complexity of information

overload. Formal communication in these organizations occurs through the 'chain of command,' which controls information held by an organization (Schmidtchen 2006, 147).

The 'information-retrieval culture' organizing principle, in contrast, connects "formerly separate domains of information and knowledge by lowering the conventional barriers." The focus shifts from authenticity, permanence, and meaning to "availability and access… An information retrieval culture …promotes knowledge… through connection to the widest variety of sources of information possible" (Schmidtchen 2007, 148).

Contemporary Network-enabling technologies support the values of an information-retrieval culture. Like the expeditionary mindset the retrieval culture embraces uncertainty, and comprehensive information sharing. It facilitates communication in a joint environment. The retrieval culture views a workforce as fluid, flexible and decentralized. In this culture, like the expeditionary environment, "information retrieval and knowledge creation are ongoing activities." The information retrieval culture, has no single mental model to resole uncertainty; "the basis for success is the individual's ability to quickly build new models that offer different perspectives and ways of acting" (Smidtchen 2006, 149). The similarities between the tenets of the expeditionary mindset and Network Centric Warfare are obvious and tend to reinforce each other. The expeditionary mindset appears to call into question many components of conventional military thinking. If so will timeless core values continue as guides or will core values also need to be changed?

Core Values[23]

> *Moral elements are among the most important in war. They constitute the spirit that permeates war as a whole, and at an early stage they establish a close affinity with the will that moves and leads the whole mass. (Clausewitz 1976, 184)*

According to Paprone and Reed (2008, 72) values are "the least visible of social

[23] There was no literature that looked directly at the topic of the expeditionary mindset and core values.

manifestations, values are generalized ideological justifications for roles and norms." Values express aspirations that inform requisite action. Values are culturally rooted and are often an unseen tacit backdrop that "drives criteria for making judgments about knowledge."

The core values of an organization form the value foundation for work and conduct. Among the universe of values, core values are so primary that they remain stable even as events and circumstances transform military organizations. Ideally, in a world where transformation is ongoing core values clarify identity, purpose and process, guide decision-making, govern personal relationships and require no external justification.[24] Core values of the warrior are in many ways universally understood. They are found in ancient poetry such as the *Iliad* and in modern best selling novels (Samet, 2002). Military core values transcend time and national boundaries.

Ideally, an organizational transformation from a conventional to expeditionary mindset would leave core values untouched. There is reason to expect the transformation to an expeditionary mindset could change understanding of core values as new issues arise. In an expeditionary force core values inform a flexible, 'small wars' mindset vis-à-vis the more fixated, dogmatic, conventional 'big war' mindset. Unfortunately the notions of mindset and core values are not particularly distinct. They can reinforce each other and should be observed in behavior. This is particularly true because the term "dogmatic" (something linked to the conventional mindset) originated from the term dogma, which are the core principles in organizations like churches. Traditional more fixed core principles and core values might be intertwined. It seems unlikely that intertwined core values/core principles would completely transfer from the big war to small war mindset. There may be elemental principles associate with the 'big' war mindset incompatible with an expeditionary mindset and vice versa.

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[24] I was unable to find a good definition of core values in the literature. Much of this discussion came from a United States National Park Service web site on core values http://www.nps.gov/training/uc/whcv.htm .

Before examining the nature of military core values it is useful to explore the traditional warrior understanding of human nature, which emphasizes the dark side. In his classic, *The Soldier and the State*, Samuel Huntington (1964) addresses this issue. The professional soldier's business is war and "the military ethic views conflict as a universal pattern throughout nature." Violence is rooted in the permanent psychological and biological nature of man. The military ethic emphasizes the evil. Selfish and weak man is motivated by wealth, power, and security. The "military view of man is decidedly pessimistic…. Man's selfishness leads to struggle but man's weakness makes successful conflict dependent upon organization, discipline, and leadership" (Huntington 1964, 63). The warrior believes this selfish nature leads to conflict and eventually to violent conflict. The warrior prepares for violent conflict by subordinating individual preferences to those of the organization. Warriors confront evil and are expected to deal with many of the consequences of this evil such as war, and violence. Nevertheless, the ideal warrior strives to maintain a virtuous way of life. Military virtues are "none the less virtues for being jewels set in blood and iron" (Toynbee 1939, 644).

In order to survive and thrive in the world of Huntington's warrior, the soldier and his organization must adopt and promote virtues. Thus, core value statements of the US Army, Navy and the British Army include lists of virtues. All three organizations include loyalty, duty, integrity and courage. The US Army and Navy also overlap on two additional core values - respect and "selfless service" (Army) and "selfless commitment" (Navy). The US Army further includes honor and the Navy discipline as core values (Robinson 2007, 31).[25] Aristotle's virtue ethics is the philosophical origin of these formal service specific core values. Ideally, training in virtue ethics instills virtues such as loyalty, honesty, and courage to ensure moral behavior and create good character. The person with character should behave appropriately. The advantage,

[25] For an explanation of US Army core values see http://www.goarmy.com/life/living_the_army_values.jsp#loyalty . For a discussion of United States Navy core values see http://usmilitary.about.com/od/navy/l/blcorevalues.htm .

from a military point of view, "is that in combat, there are intense pressures and little time for deep intellectual philosophizing. In such situations having an individual who will behave properly due to conditioned responses is highly desirable" (Robinson 2007, 30).

Criticism of the emphasis on character in the virtue ethics approach focus on the possibility that military leaders will believe "all unethical behavior is the product of failures of character (few bad apples theory)." Many times this perspective does not take into account morally corrupting structures, rules, and systems that are part of institutional practice. In addition, "teaching soldiers that they must be brave, loyal and so forth, does not tell them what to do when there are conflicts between the requirements of various virtues" (Robinson 2007, 31).

Asa Kasher, author of the *Code of Ethics of the Israel Defense Forces* (IDF) has an additional criticism of the virtue ethics approach.[26] He argues that since humanitarian intervention and peacekeeping operations are the focus of most Western armed forces, it makes little sense to teach soldiers only military ethics. He advocates a combination of police and military ethics. Police ethics require a different set of virtues[27]. Also soldiers in "modern democracies tend to be moral relativists. They regard talk of morality as an external imposition." They relate better to professional development and identity. So, instead of listing a set of virtues as core values, one should consider what is means to be a soldier in a democratic state. This means that the starting point of defining core values should be the principles of liberal democracy, its values and norms (Robinson 2007, 32). Robinson (2007) notes that in practice virtues derived from a liberal democracy are similar to the virtues listed for the warrior.

It would appear, however, that humanitarian peace operations, stabilization operations and other tasks associated with contemporary expeditionary missions may implicitly be at odds with Huntington's pessimistic assumptions about the dark or evil side of human nature. Perhaps

[26] See http://www.jewishvirtuallibrary.org/jsource/Society_&_Culture/IDF_ethics.html .
[27] See for examples of police ethics http://www.culcom.net/~lake/policecodeofethics.html

a concept (critical optimism) borrow from John Dewey (1948) would be a useful substitute. “Critical optimism is the faith or sense that if we put our heads together and act using a scientific attitude to approach a problematic situation, the identified problem has *potential* to be resolved. This is faith in the human capacity for progress (Peacekeeping missions can succeed!). Without some faith in the possibility of progress, soldiers would be tethered to Huntington’s dark vision. Critical optimism avoids the pitfalls of both optimism and pessimism. "Optimism, untempered by criticism, declares that good is already realized and as a result glosses over the evils that concretely exist" (Dewey 1948, 178). The optimist easily becomes "callous and blind to the suffering of the less fortunate," or adopts a rose-colored glasses attitude and is unwilling to listen to the concerns of others. On the other hand, "pessimism is a paralyzing doctrine. In declaring that the world is evil wholesale, it makes futile all efforts to discover the remedial causes of specific evils and thereby destroys at the root every attempt to make the world better and happier" (Dewey 1948, 178). Both unfettered optimism and pessimism are consistent with dogmatism and perhaps determinism. Critical optimism, on the other hand, embraces uncertainty and change but with a skeptical attitude. Critical optimism (meliorism) "is the belief that the specific conditions which exist at one moment, be they comparatively bad or comparatively good, in any event may be bettered. It encourages intelligence to work to improve conditions and it arouses reasonableness and confidence as optimism does not" (Dewey 1948, 179).”

Paparone and Reed (2008, 72) distinguish between espoused values (“stated deliberately and formally by the institution”) and in-use values (“a cultural phenomena, passed from one generation to another as deeply hidden or tacit forms of assimilated knowledge).” Military organizations experience serious problems when the gap between espoused and in-use values is too wide. There is no reason to believe an expeditionary soldier will not behave with integrity or honor, in-use manifestation will be different in an expeditionary environment. Careful

consideration of the role and nature of core-values in practice (expeditionary environment) should be occupying the attention of military leadership across the world.

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