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The Fourth Generation of Military Special Operations Selection & Assessment

A Community of Praxis

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WHITE PAPER



About the Author

Dr. Cline's research has given him access to Military Special Operations Selection and Assessment in all Five Eyes (FVEY) Countries: Australia, Canada, New Zealand, the United Kingdom, and the United States^[1].

Executive Summary

Developing a methodology to select optimal candidates for military special operations teams remains an enduring challenge. This stems from the fact that teams are continuously working to avoid rejecting a suitable candidate (i.e., a false positive) or selecting an unsuitable candidate (i.e., a false negative)[2]. Overcoming these challenges is further complicated by the lack of a universal agreement on how to design and implement a military special operations selection and assessment program. Part of the challenge is that there are three distinct generations of Military Special Operations Selection Models developed by two separate communities of practice: Psychologists and Instructor Cadre. The first generation, beginning in the 1920s, was developed and implemented by psychologists using a trait-based testing approach designed to identify the ideal candidate for a specific job or task[3]. This was followed in the 1950s by an instructor cadre-led right-of-passage approach focused on using attributes to select the right candidate to join a specific community[4, 5]. Then, in 1988, the US Army Special Operations Command brought psychologists and the instructor cadre together to develop a selection process that incorporated both traits and attributes. In this paper, we review the existing models, describe their historical context and relative strengths and weaknesses, and identify a fourth generation of selection, requiring a new model that combines the two separate communities of practice into one community of praxis. Unlike prior models that rely on either psychologists or existing team members, or some combination of the two, a community of praxis model leverages the diverse knowledge and experience of three distinct groups: academics, communitas, and leadership. By acknowledging differences in lived experience, the type of knowledge used, and the method of communication, the community of praxis model intentionally bridges these differences to produce a coherent, synergistic selection process. When properly developed and executed, this fourth model of selection should select candidates who better fit the current and future missions of special operations teams, adjust more rapidly to changing mission and selection requirements, move teams toward operational coherence rather than away from it, and run more efficiently and effectively than existing models. MCTI strongly recommends that military special operations teams transition to this new community of praxis model for selection and assessment.



Introduction

All Military Special Operations Teams, like all other Mission Critical Teams, are created in response to specific problem sets^[6]. The primary purpose of an Assessment and Selection (A&S) program is to identify individuals who can help resolve a specific problem set within a particular organizational, technical, and cultural ecosystem. Importantly, these problems continue to evolve, and so too must our solutions^[7]. Take, for example, how human society has evolved to manage conflict. Individual human conflict is at its core a *technical*^[8], or “obvious”^[9] problem set (i.e., someone throwing a punch), that requires a mechanistic^[10] solution (e.g., block the punch). In the face of a large raiding party, early humans were often unable to defend themselves through *individual action* and instead could only flee. As humans gathered in villages for greater protection, those denser communities could rally together through *collective action*, in the form of ad hoc militias, to defend against invaders^[11]. As these villages grew into cities, the size and technical sophistication of the threat evolved from a *technical* problem to a *complex one*^[9]. The result was that communities now needed to transition from collective action, in the form of militias, to *professional action*, in the form of a professional conventional military^[12]. Professional organizations, such as Fire Departments, Hospitals, and Police Departments, are tasked with responding to problems that emerge at the boundary between civilization and chaos, the threshold between our normal, everyday lives and the chaos of war, natural disasters, and other extreme events. Such organizations are appropriately known as High Reliability Organizations (HRO)^[13].

HROs are designed to centralize experts to create complex human technical systems and processes to gain greater control over technical, complicated, and complex problem sets^[14-16]. To maintain those technical systems and preserve their reliability, HROs must consistently choose predictability over agility. As problem sets continue to evolve, however, HRO will eventually encounter “criticality” where a combination of high urgency and high consequence exceeds its capabilities. At this point, they are forced to create a Mission Critical Team (MCTs), a small (4-12 agents) integrated group of indigenously trained and educated experts that leverage tools and technology to resolve unordered problem



sets, or more specifically, rapidly emergent complex adaptive problem sets (RECAPS), in an immersive, but constrained (five minutes or less) temporal environment, where the consequence of failure is catastrophic loss^[17]. In the context of Military MCTs, this takes the form of Special Operations, as small interdependent teams of experts are more effective than individual experts in resolving urgent, complex, and consequential problem sets^[17-19].

Special Operations Teams, or *commandos*, have been used in war since ancient times^[20]. However, they were often disbanded immediately after the war because of their disruptive impact on the garrison army^[21-23]. By 1950, however, with technological advances such as the computer, the jet airplane, and the nuclear bomb, problem sets were emerging faster, with far greater urgency and complexity than Military HROs could address with existing conventional solutions. For these reasons, for the first time in modern history, the British Military decided to permanently reform the 22nd SAS, a Special Forces Commando unit^[24, 25]. Two years later, in 1952, the U.S. Army, following the lead of the British, formed the U.S. Army Special Forces ("Green Berets")^[26]. In subsequent years, this trend continued as numerous Military Special Operations teams around the world were stood up^[27-32]. Key to understanding this evolution is recognizing that the conventional military (HRO) remains nested within and subordinate to the governing body of a society, while Special Operations (MCT) is nested within and subordinate to the conventional military. This relationship creates an ongoing tension: the HRO constantly demands greater predictability from the MCT, but the MCT must maintain its agility to adapt faster than emerging problem sets or risk becoming irrelevant and obsolete.

The Purpose of Selection

With the creation of each new Special Operations Team, a system must be established to determine who should be on that team (selection) and who should not (attrition), hence the origin of A&S programs^[33]. The core purpose of selection programs is to be revelatory. By placing a candidate in a simulated experience, designed to match the speed and complexity of the team's evolving problem set, a selection program is designed to reveal a candidate's potential, specifically to:



- Reveal the candidate to the cadre (Do we want them?)
- Reveal the candidate to themselves (Can I do this?)
- Reveal the communitas to the candidate (Do I want to join this tribe?)

Intentionality about Selection Methodologies

As we will discuss, every A&S program faces the ongoing threat of standards creep as each new generation of staff wants to “update” the process. For this reason, it is critical that teams understand the scientific and cultural rationale behind their A&S program and their mechanisms for evaluating a candidate’s traits, attributes, and aptitudes:

- **Traits:** Are consistent patterns of behavior, thought, and emotion that can be measured quantitatively and reliably compared to others ^[34-36]. Traits are indicators of whether a candidate is capable of performing a specific task or job.
- **Attributes:** Are qualitative characteristics that are not easily measured, such as trust, mental agility, singing ability, sense of humor, attitude, and a good fit on the team. Attributes are indicators of whether the candidate can become a contributing member of the team.
- **Aptitudes:** Are the natural capacities to learn or understand skills, and are measured quantitatively through specific skill development, such as shooting precision, pull-ups, driving agility, etc. They are strongly influenced by natural athletic talent ^[37, 38]. Aptitudes measure a candidate's ability to perform established tasks or clusters of tasks against specific metrics.

Intentionality about Attrition

Most unsuccessful candidates in an A&S program return to the conventional military. For this reason, every A&S program should be developmental in nature. Everyone who comes through the pipeline should be made better by the experience. To this end, teams need to understand and be intentional about the mechanisms by which attrition occurs.

- **Drops On Request (DORs):** Candidates self-selecting out.
- **Injury/Personal Issue:** Candidates leaving due to injury, family issues, mental health, etc.



- Failures: Candidates failing to pass baseline standards and being removed from selection.
- Non-Selects: Candidates who finish selection but are not chosen to move forward.
- Wastage: A WWII term used to denote a candidate who passed Selection but who failed to make it through the follow-on school or academy ^[39].

Generally, it is in the organization's and the candidate's best interests for the candidate to decide to leave A&S after being confronted with their performance (DOR).

Competing Assessment and Selection Models

The challenge currently facing Military Special Operations A&S programs is that two competing models (Psychological Assessments and Rites of Passage Assessments) aim to achieve the same outcomes. The former takes a secular academic approach, while the latter takes a sacred experiential approach. To understand how to resolve the ongoing tension between these two systems, we need to understand their origins, the rationale behind their development, what each is trying to achieve, and how they might be synergized.

- **The Psychological Assessment Model:** Developed during and after WWII, psychological assessment is a theory-based process, designed and implemented by psychologists. It uses individual and group tests to evaluate a candidate's traits to determine their ability to do a job or task ^[26, 40, 41]. It is often used in corporate hiring and promotion, as well as in educational admissions.
- **The Rite of Passage Assessment Model:** A rite of passage refers to an anthropological theory of how people transition from one identity to another (eg, childhood to adulthood). A rite of passage follows three stages: Separation from your previous life, Liminality or the threshold between who you were and who you are to become, and incorporation or actual receiving your beret, badge, symbol, etc. This phase is characterized by a series of shared experiential trials that every existing member once had to pass through to reveal whether they meet the tactical and cultural requirements to join the community or tribe ^[4, 42-44]. Current elder



members of the team (Instructor Cadre) run the process. It is primarily used in Military Special Operations and specific Tactical Law Enforcement teams.

First Generation: 1927-1948 Psychological Assessment Programs

The first-generation A&S model emerged from conventional military organizations and later intelligence services that required an unbiased mechanism to select individuals for specific tasks or roles. To this end, they assigned a team of psychologists to design a trait-based A&S model that relies heavily on academic testing.

1927, German Wehrmacht

Prior to WWI, the concept of selection was primarily one of kinship. If you were the son of someone of status, you were “selected”. The increased complexity of war necessitated adaptation⁷. By 1927, the German Wehrmacht was already planning to rebuild its military after the losses of World War I, but the Treaty of Versailles imposed heavy restrictions on its potential size^[45]. The challenge was that the German Military was caught between the Prussian aristocracy, who had historically chosen officers from the upper class, and the rising Nazi party, who wanted officers selected from the Hitler Youth Program^[46]. The first experimental psychology laboratory was established in Germany several decades earlier, giving the German Military access to psychologists capable of developing a scientific selection process independent of political pressures^[46-48]. This new “Character-Based Selection” program was centered on the emerging theory of “Characterology,” which sought to study the core traits of “great” men^[49-51]. The fundamental idea of this study was the assumption that “if character traits responsible for the success of great aces could be revealed, then the selection program could be devised to test for these traits”^[52].

The project proceeded under the leadership of Dr. Max Simoneit^[52-56], who believed you needed to see “the whole man”^[57] through the observation of action, and not just the component parts, such as intelligence or physical fitness, that emerged from specific testing. Simoneit and his team of Psychologists designed and implemented a series of tests over a two-day period that allowed the psychologists to assess the candidate’s general intelligence, ability to plan, and how they presented themselves, which they combined with a review of their life history^[46, 57, 58].



In 1942, the Wehrmacht Psychological Assessment Program was discontinued primarily due to insufficient evidence of its effectiveness. As one source put it, “no acceptable evidence was accumulated to show that the program was successful...[n]or were Nazi psychologists able to refine their procedures on the basis of validation of separate tests or of studies to confirm the hypotheses on which testing procedures were based”^[52]. This lack of acceptable evidence regarding the program's success continues to plague assessment centers to this day. However, in a move with unintended consequences, before the program was shuttered, participating psychologists published their research in international academic journals^[53-56].

1939 Britain War Officer Selection Board (WOSB)

During the same period, the British military recognized that war with Germany was coming, and it would be a battle for the survival of their nation^[39, 59]. To survive, they would need to grow their military from 384,000 personnel in 1938 to nearly 5,000,000 in uniform by 1945^[60]. Historically, how an individual became an officer in the British Army was to go before a Regular Commissions Board (RCB)^[61], which was primarily designed, much like the German Model, to select a candidate from the upper social classes by asking interview questions related to their “school, their father’s occupation and income”^[39]. This process was often referred to as the “magic eye technique”^[39] because many officers said they knew a quality candidate when they saw one. With the sudden buildup to WWII, there were not enough upper-class young men to fill the officer ranks, so the British military began recruiting potential officers from the lower classes. However, the class divide in the 1930s was so significant that upper-class members of the interview boards simply did not know what questions to ask lower-class applicants^[39, 62].

From a process perspective, the RCBs were historically a “rejection process”^[39]. The rejection rate for officers was “20% to 50%”^[39]. For the military to get the officers it needed, this system would need to change, but the need for these procedural changes ran directly against the long-held cultural beliefs of the contemporary leadership. “General Sir Walter Kirke (Director-General of the Territorial Army) voiced these concerns when he warned that it was ‘important not to take any drastic measures to attract a new



class of officer, whose entry in any considerable numbers would probably have the effect of curtailing the existing supply from the superior classes”^[62].

To overcome these process and cultural challenges, the British Military decided to adopt many of the German Assessment Program strategies. It began by bringing in some outsiders in the form of three psychiatrists: T. F. Rodger, E. Wittkower, and W. R. Bion^[62]. Their task was to design and lead a new process to select a large number of officers outside the influence of the upper classes^[57, 62]. They began by adopting the methodologies outlined by Simoneit in German psychological journals. They developed a three-day, experiential-based selection process, called the *War Officer Selection Board* (WOSB), to evaluate a candidate's traits^[39, 57, 63, 64]. The concept of this type of WOSB has endured in various forms and countries worldwide, credited with enhancing the quality of officer ranks and breaking down cultural barriers post-war^[62]. At the end of the war, however, the military leadership, who were now combat veterans from WWII and who had never accepted that psychologists could share their decision on who could be an officer in their community, decided to remove psychologists from the selection boards permanently^[65].

1941: The Office of Strategic Services (OSS)

After the attack on Pearl Harbor, President Roosevelt became increasingly concerned that the existing American intelligence efforts were not sufficient to the task at hand^[66]. To remedy the situation, he approved a plan developed by Army Officer William J. “Wild Bill” Donovan to create a new capability that would become the Office of Strategic Service (OSS), with a charge “to conduct ‘espionage, propaganda, subversion, and related activities,’ including waging unconventional warfare”^[57]. Initially, the rush to get operators into service meant that only minimal effort was devoted to selection. In fact, “...the OSS was not uncommonly referred to as ‘Oh, So Social,’ because so many of its original members were personal friends of William Donovan and prominent members of society”^[57]. The problem with that method was that just because you were a member of William Donovan’s fraternity at Columbia did not mean that you possessed the unique skills necessary to be an espionage agent. This often resulted in President Roosevelt having to negotiate the release of those same young fraternity boys after the Gestapo picked them up



as spies. In the report outlining the flaws in the initial selection program, investigators noted that Columbia somehow failed to teach these young men certain skills, including “disassembling under threat of torture by the Gestapo, or properly accounting for large sums of money with little supervision”^[57].

Two years later, in 1943, President Roosevelt reached out to Dr. Henry Murray, one of the fathers of clinical psychology and a professor at Harvard University, to create a new system for selection^[67]. Murray put together a diverse team of Ph. D.s, including “clinical psychologists, animal psychologists, social psychologists, sociologists, and cultural anthropologists,”^[3] to create a selection program for spies and saboteurs. They initiated their design process by traveling to Britain to observe the WOSB and reviewing all the research published by Simoneit in German psychological journals ^[41, 65]. Like the Wehrmacht and the British, Murray adopted the strategy of moving from written tests only to creating experiential opportunities to assess individuals while they were performing some exercise in order “to describe the more holistic, wide-ranging understanding of personality and performance” ^[59, 68].

Instead of Characterology, however, Murray adopted a newer method of evaluating personality characteristics, called *Trait Theory*, developed by another Harvard Professor, Gordon Allport ^[35, 69]. Allport began with Plato’s virtues^[70], devising a list of traits that he believed comprised the units of a person’s personality ^[71]; “In general terms, trait theory espouses that we can understand a person by measuring certain personality characteristics or Traits” ^[34, 35].

Importantly, Murray was not designing a selection program for those who would serve as officers in a conventional military but rather as espionage agents. The challenge was that the psychologists “[h]ad little or no first-hand knowledge of the jobs the selectees would be performing” ^[59]. To address their lack of knowledge regarding the daily life of a spy, they sent one of the young psychologists, Dr. John Gardner, to the various branch chiefs in Europe to obtain “A list of abilities and qualities which these officers considered necessary for the accomplishment of the projects planned by their section”^[72]. Keep in mind that Dr. Gardner was asking OSS Station Chiefs in Nazi-occupied Europe what the Columbia



fraternity boys could have improved upon. Many of their answers included things like don't marry prostitutes, don't gamble government money, don't get drunk every night, etc. After "translating" those responses, the OSS Psychologists identified a series of attributes, including Effective Intelligence, Emotional Stability, Social Relations, and Security (the ability to keep a secret...)^[72]. Echoes of the list of attributes created in this manner can still be found in Military Special Operations A&S programs worldwide^[4].

During the war, over 5,000 individuals would pass through OSS selection, but following the war in 1945, President Truman disbanded the OSS and the OSS Selection program before they could validate their research; "...did it work for the OSS? The war ended and everyone went home, so no one really knows" ^[73-75]. In a final review of the efficacy of the OSS selection, it was stated that the program "certainly succeeded in screening out the 15% to 20% who were obviously unfit...[but] was less effective in determining the candidate's suitability for a particular job"^[57] Around the same time in 1948, psychologists associated with the OSS Selection program released a book called "The Assessment of Men," detailing their research and procedures (Note: approximately 15% to 20% of evaluated candidates were female^[59]). This book would go on to inform corporations and industry in postwar America on how to select and promote their personnel^[21, 73, 74].

Generation Two: 1952-1988 Rite of Passage Assessment and Selection Programs

In 1952, following the permanent reformation of the British SAS in 1950, the U.S. Army established its own Special Operations Team, the U.S. Army Special Forces, commonly known as the "Green Berets." For a variety of reasons, the U.S. Army decided not to include Psychologists or create a separate selection process, but rather to create a 16-week training program that evaluated a candidate's characteristics, "broader than just task performance" ^[40]. To this end, they assigned a group of combat veterans to develop an A&S model built around a series of trials that the candidate(s) needed to overcome in order to reveal the necessary attributes required to join that specific team, as well as to create small, intact, homogeneous teams with high trust and cohesion. If the candidate passed the course and continued, they were eventually accepted into the team ^[26, 57, 76]. This



process is what anthropologists call a “rite of passage,” or a three-phase ritual that marks when a person leaves one group, or identity, and passes through a series of trials in order to transition to another group or identity ^[5, 43, 77, 78]. The three phases are:

1. **Separation:** from your old life or identity, with no guarantee of entrance to the new life or identity.
2. **Liminality:** a place betwixt and between who you were and who you wish to become, where you need to overcome a series of trials to pass to the next level.
3. **Transition:** indication that you have entered the new group or achieved the new identity.

A key misunderstanding about the Rite of Passage model is the mistaken belief that it must include hazing or abuse. The primary goal of a Rite of Passage model is not to create conflict between the Candidate and the Instructor Cadre but between the Candidate and themselves. Some of the most successful A&S models are those based on a strict no-feedback model, where the student receives no positive or negative feedback from the Instructor Cadre. They are left to evaluate their own performance.

A key difference between military psychologists, who are typically “outsiders” to the team, and the instructor cadre is that the cadre are representatives of the culture and legacy of the actual team, known as *communitas*^[43]. This refers to a group of people who have all passed through a shared crucible or rite of passage experience (e.g., “Hell Week,” “The Long Walk”, etc.) and ultimately succeed in becoming *badged* (e.g., authorized to wear the team insignia such as a Green Beret, Navy SEAL trident, FDNY Patch, etc.)^[5, 43]. These individuals maintain the sacred aspects of the culture, which encompass the nature of human experience and its narration, norms, work, history, rituals, celebrations, losses, and ultimately the rites of passage used to assess and select the next generation^[5]. The instructor cadre is considered *elders* of the *communitas* who are given the role of approving new members^[79]. The strength of a rite-of-passage model is that it provides an experience that every member of the organization, regardless of when they join, shares in



common. This shared experience provides a common language and sets of norms that enable rapid development of trust and cohesion between generations.

The Difference Between the Two Models

The Psychologists who created the original Trait-Based A&S model and the Instructor Cadre who created the Rite of Passage model are both parts of what is called “Communities of Practice”^[80]. “Communities of practice are groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis”^[81]. They follow groups such as a “tribe around a cave fire, a medieval guild, a group of nurses in a ward, a street gang, or a community of engineers interested in brake design”^[80]. The problem is that the way each of those Communities of Practice makes sense of the world is quite different.

Different Frames of Perspective

One of the challenges in overcoming this conflict is that the two communities of practice were established to pursue distinct yet legitimate outcomes, valued different sources of knowledge, and used different languages to express that knowledge.

Different Ways of Knowing

Most academics, such as psychologists, derive their knowledge from explicit (i.e., written) science, which is both testable and repeatable and is referred to in Latin as *A Priori*^[7]. Conversely, the instructor cadre tends to source their knowledge from their direct experience, a source often called tacit knowledge, or the Latin *A Posteriori*^[82]. The challenge with tacit knowledge, unlike explicit knowledge, is that it is very difficult to fully explain to someone else. For example, consider teaching someone how to ride a bike or learning to swim. Even highly skilled cyclists or swimmers can struggle to explain how to ride a bike or swim to someone else. This phenomenon, referred to as the Tacit Knowledge Transfer Problem, describes the challenge experts face when attempting to make their Tacit knowledge explicit, articulate their expertise, or explain what “right” looks or feels like^{[17, 82,}

^{84]}.



Different Ways of Communicating

While leadership would receive explicit scientific data from the psychologists, the cadre would express their tacit knowledge by stating that they had a “bad feeling” about the candidate or that he was “a good bloke.” This difference was not due to differences in the relative intelligence of the two groups; rather, the two types of knowledge are communicated in very different ways. For example, the scientific language psychologists use to describe their observations from a position outside the lived experience is referred to as *etic* (e.g., the candidate is in the top quartile)^[85]. On the other hand, *emic* refers to the language that emerges from the shared experience of the communitas. What academics call “Funds of Knowledge” or the historically accumulated and culturally developed bodies of knowledge and skills, which are often hard to quantify or articulate, but which ultimately enable the team to function effectively and accomplish their mission (e.g., The candidate looks like an operator)^[86, 87]. The mistake many people make is believing that either *emic* or *etic* is superior, when it is their integration that often yields new insights and optimal outcomes.

Different Outcomes

One persistent source of confusion and conflict between psychologists and the instructor cadre is that both regard themselves as employing “attribute-based” assessment models. While both traits and attributes are considered personality characteristics, they were, and are, created using two very different methodologies. When Nazi psychologists first began using characterology in 1927, they sought heritable traits that could be observed and measured with scientific instruments to predict who would be successful in specific jobs or roles^[69]. Subsequent academic research reduced these traits to what are now known as the “The Big Five” (neuroticism, extraversion, openness, agreeableness, and conscientiousness), which are used in most current personality inventories^[88-92]. One of the reasons psychologists were attracted to trait theory is that those traits were believed to be stable over one’s lifetime. For example, it was thought that a 19-year-old who was agreeable would remain so at 40. Research now indicates, however, that personality traits can change in response to significant life events,



such as combat, injury, or divorce ^[93]. The point is that traits are theoretical constructs (a priori) that attempt to explain observed phenomena, which psychologists believe are required to effectively perform a task, or take on a role, in corporate America.

Alternatively, attributes emerge from the cultural norms, or lived experience, of the existing team (a posteriori) ^[82]. They represent the qualities the tribe believes team members need to be trusted and contributing members ^[42, 94, 95]. One key challenge with attributes is that each generation interprets attributes in a slightly different way. For example, the attributes of *sacrifice* and *work ethic* are being forced to evolve in a hyperconnected world where there is no longer a separation between home and work life.

The Flaws in Both Models

In addition to the different ways communities of practice perceive the world, each model has important strengths and weaknesses.

The Enduring Challenge with Psychological Assessment and Selection Models

With the dissolution of Military Psychological A&S programs after the war, psychologists who were involved generally took one of three paths: return to their universities, join the newly founded Central Intelligence Agency (CIA), or help create a new generation of A&S programs in the private sector, such as the Michigan Bell Assessment Center ^[74]. During this period, psychologists conducted research to determine how to select the appropriate person for a corporate position. They began to push back against the claim that holistic qualitative assessment programs were superior to quantitative ones ^[64]. This was by no means a new debate, considering that in 1926, in the very early stages of what would become experimental psychology, “psychologists [were] unable to agree, even among themselves, on a person’s abilities by simply observing the person” ^[64].

By the 1970s, psychological researchers had reached a number of conclusions that questioned the validity of the qualitative assessment programs and concluded that “[m]ost of the procedures used to predict future job success are the very one’s experience has demonstrated do not work” ^[71]. Among these results, they found that candidate observation, rather than test-score predictions, was most often relied upon to predict candidate success, even though most research shows that test scores are more accurate



and that interviews, while common, are unreliable predictors. Additionally, they concluded that “[m]anagers are asked to integrate all this information and predict behavioral traits as well as potential success, even though psychologists are still struggling to demonstrate that even they can do it well”^[71].

Later research found that there were “surprisingly few studies on the relative effectiveness of holistic assessment for employee selection, especially as it regards individual assessment,”^[64] and those that did exist yielded mixed results. Given that none of the German, British, or U.S. A&S programs during WWII were ever scientifically validated, and later research would cast doubt on the scientific outcomes, it would be prudent to acknowledge that the efficacy of psychological assessment is not settled science^[75-77].

The Enduring Challenge with Rites of Passage Assessment and Selection Models

A rite-of-passage model is, at its core, a cultural ritual. Over time, however, tribal culture tends to become mythologized, which in turn creates a series of ongoing challenges that every MCT must manage on a regular and recurring basis, specifically: excellence creep, increased instructor cadre burnout, and the standards paradox.

- **Excellence Creep:** Most instructor cadre on MCTs are not permanent staff. They are pulled from operational roles for a 6-24 month rotation in a training capacity. This means they have very little theoretical knowledge or institutional memory of how selection is supposed to work, except for their memories of having been candidates themselves. These memories are inherently biased^[96]. For many individuals, selection was the hardest thing they have ever experienced, and they may feel an obligation to make the trials as hard, or even harder, for the next generation. Because the incentive is to produce the best possible operator, there are very few systemic constraints that could prevent this process from running out of control, with each new generation adding to the length and physical difficulty of selection. As selection programs gradually increase in length and difficulty, the organization incurs higher costs, both in time and money, and higher attrition, including more medical drops due to overexertion or injury.



Ultimately, this means that the HRO is spending more resources but receiving fewer selected candidates ^[26].

- **Instructor Burnout:** As each generation of cadre increases the length and difficulty of selection, they also increase the workload on a finite number of instructors. Compounding the increased workload is the ongoing myth that an instructor's role entails more time at home with their family than deployment overseas. Instead, what frequently occurs is that Instructors are home just long enough each day to disrupt the family routine, but not long enough to improve it, often leading to increased family conflict.
- **The Standards Paradox:** Given that the above trends will typically result in higher instructor burnout, increased cost of selection, and fewer graduates, the HRO needs a mechanism to periodically “reset” a rite of passage selection. However, any effort to reduce the length or intensity of selection can be seen by the communitas as a lowering of standards and a dilution of the team’s legacy.

Without external intervention and occasional maintenance, a rite-of-passage model is highly likely to fail, as these factors lead to an inability to retain sufficient instructor cadre or to select sufficient candidates to maintain the team's operational strength. Ultimately, it was these stressors that led the U.S. Army to re-engage with military Psychologists to create a standalone selection process for U.S. Army Special Forces in 1988 ^[26].

Generation Three: 1988-2022 Joint Communities of Practice

One of the early architects of the new U.S. Special Forces A&S program was an Operational Psychologist named Dr. Morgan Banks, who also happened to be a Green Beret (His academic work is cited throughout this paper). In a recent interview, looking back at that early period, he commented:

“Many of the programs I supported were both rites of passage and incorporated psychological assessment into that overall assessment. I would hope that all of our assessments (in a perfect world) would be seen by those participating as having the positive aspects of rites of passage, along with the positive aspects of using our



knowledge of human behavior to assist in the prediction of success. My experience was that we worked very closely with the cadre as a team”^[97].

While the early seeds of a joint, integrated A&S model were emerging, thanks to individuals such as Dr. Banks, we also saw the proliferation of new Special Operations Teams around the world that chose their own selection models. In many cases, collaboration between Psychologists and the Instructor Cadre was hindered by mistrust and arguments over selection authority. This tension would later give way to an emergent internecine conflict within the academic (psychological) disciplines engaged in the selection process. The initial Military Psychological A&S programs employed psychologists from diverse backgrounds in research and clinical disciplines.

When Operational Psychologists were reintroduced to A&S in the 1980s, they were predominantly Clinical Psychologists who combined clinical responsibilities with command consultation, A&S support, and operational support for training and real-world missions. Civilian research psychologists also continued to support the development and evaluation of evolving A&S events and programs. In addition to Clinical Psychologists, over the last 15 years, teams have seen the emergence and inclusion of Industrial-Organizational (I/O) Psychologists, performance psychologists, behavioral psychologists, as well as social workers, chaplains, and unregulated “coaches.” To complicate matters even more, some of these professionals are trained in what is called the medical or pathological model (“what is wrong with the person; how do we fix it?”), while others are trained in a positive or strengths-based model (“people are inherently strong and capable, how do we make them more so?”). The influx of professionals with diverse theoretical and conceptual frameworks into the field often leads to internal conflict as each discipline attempts to establish its own authority. This results in leaders and communities being uncertain about whom to consult, frequently defaulting to those with whom they have the best relationships rather than those most qualified.



Generation Four: 2026 – A Recommendation to create a Community of Praxis

We propose a fourth model centered on a community of praxis. The term praxis describes “the synthesis of theory and practice” [38]. Therefore, unlike a Community of Practice, which is either theory (Psychology) or Practice (Cadre), a Community of Praxis is a group that synthesizes diverse sources of knowledge into practical outcomes. To overcome the historical conflict, however, a third community, the leadership, is required to help arbitrate the differences in knowledge and language. By acknowledging differences in lived experience, the types of knowledge utilized, and communication methods, the community of praxis model intentionally bridges and synthesizes these differences to achieve better outcomes.

	<i>Communitas</i>	<i>Leadership</i>	<i>Academics</i>
<i>Responsibility</i>	The Culture (Sacred)	The Organization	Science (Secular)
<i>Focus</i>	Trust & Legacy	Mission, Money, Staffing Numbers	Scientific Rigor & Predictive Capacity
<i>Knowledge Base</i>	Implicit & Tacit	Arbitration	Explicit & Testable
<i>Language</i>	Emic: Language of Experience (Story)	Emic & Etic	Etic: Language of Science (Data)
<i>Driver of Change</i>	Change in Mission	Change in Environment	Change in Science
<i>Philosophy</i>	A Posteriori: Knowledge based on experience	Mixed	A Priori: Knowledge independent of experience
<i>Prime Methodology</i>	Qualitative	Arbitration S	Quantitative
<i>Goal</i>	Selecting the right person for the culture	Maintaining a deployable force	Selecting the right person for the job

- **Communitas / Instructor Cadre (Sacred):** Made up of individuals who have themselves previously passed through selection as candidates. They require a process that selects competent individuals who can do the job, share the team's values, and can make a cultural contribution that aligns with the team's language and history.
- **Leadership (Secular):** Comprises badged (or in some cases unbadged) individuals who are responsible for the evolving mission of the team, providing the financial and institutional resources to run selection, and making the final decision on whether a candidate is selected or dismissed.



They require a selection and training process that is repeatable, reliable, accessible, and efficient, and that produces sufficient candidates to sustain the Mission-Critical Team. It is their responsibility to arbitrate between the information provided by academics and the instructor cadre to make a final decision on candidate selection.

- **Academics (Scientific):** Typically unbadged scholars or subject matter experts (such as psychologists, human performance experts, educators, etc.) who are tasked with applying scientific theory and knowledge to the processes and procedures of selection to ensure rigor, consistency, accuracy, and fairness. Their primary role is to help the leadership determine whether a candidate possesses the necessary psychological traits to perform a specific task or job, and to defend the process if challenged.

The Evolving Problem Set

In 2022, the onset of the war in Ukraine brought a new problem set that required a new type of team: individuals with diverse expertise, geography, language, and allegiances who rapidly converged into a heterogeneous cross-functional unit tasked with solving an emergent problem and then dispersed just as quickly. We have termed these types of teams *Tactical Swarms*. What quickly became apparent in this new fight was that only a small minority of individuals selected and trained under a traditional, intact, homogeneous special operations team model were successful in these new tactical swarms. Many individuals were exceptional at teamwork^[98, 99], working in concert with a known homogeneous team; but often lacked the skill of teaming^[100, 101]. Teaming is the ability to rapidly build cohesion within a heterogeneous group. Additionally, some special operations team members conflate their team's past capabilities with their current team's purpose, becoming linked to a specific skillset ("Our purpose is to engage in direct action") as opposed to a broader ethos ("Our purpose is to evolve to the next problem set")^[102].

As these trends converge, military special operations teams encounter rapidly changing problem sets, coupled with a reluctance to adapt, a potentially outdated selection and training model, and increased infighting among academics. To maintain their



ability to resolve an increasing volume and complexity of problem sets, changes will be necessary. For these reasons, we recommend the creation of a new model of Military Special Operations A&S, grounded in intentional communities of praxis. While communities of practice are built around a particular subject, role, or discipline, communities of praxis are groups of diverse individuals looking to actively and iteratively integrate different forms of knowledge into action. Where communities of practice divide, communities of praxis build synergy and creative action. In other words, communities of praxis enable all members of the academic/communitas/leadership to work together for the common purpose of improving special operations selection. To build this type of community, special operations teams need to clarify purpose, roles, and language. Much like the transition from Joint Operations to more integrated task force models, or “teams of teams”, in special operations ^[103].

Roles

Unlike prior models that rely only on psychologists, existing team members, or an awkward combination of the two, the community of praxis model fosters connection and draws on the divergent experiences of three distinct groups: the academics, the communitas, and the team leadership. To achieve the best possible outcomes for the HRO and MCT, future A&S programs should be an ongoing synthesis of experience and theory. As a result, communities of praxis require active participation from influence among these groups is critical. In military special operations, identifying individuals whom teammates can trust will remain the core goal, as communitas will always select candidates they trust over those perceived as more competent but less trustworthy. As a result, the role of academics in communities of praxis must remain one of supporting, rather than directing, candidate selection. At the same time, the enduring problems within a rite-of-passage model (including excellence creep and the standards paradox) necessitate the communitas's engagement with academics to maintain the purpose and structure of selection.



Language

For the community of praxis to function effectively, a mechanism is needed that allows each community of practice to have a voice that is both credible and clear. This means finding ways to represent the qualitative data produced by the instructor cadre with a level of scientific validity comparable to that of the quantitative data produced by academics. For example, one successful method is to collect qualitative comments from instructors throughout the selection process and present them as a word cloud. These word clouds make aspects of the instructors' tacit knowledge explicit and more accessible to other members of the selection group. As seen in Figures 1 and 2, which present examples of word clouds, the more frequently members of the instructor cadre use a particular word, the larger the word grows. The resulting image allows leadership to quickly see how the entire instructor cadre views a particular candidate and to more easily integrate their views with the quantitative data of the academics^[104]. The combination of these two perspectives reduces bias and encourages innovation. It is critical that additional techniques be developed to create a shared language and understanding that make both qualitative and quantitative data accessible and unify the community of praxis in selecting future members.

Figure 1 - Unsuccessful
Candidate



Figure 2 - Successful
Candidate





Conclusion

The problem sets are evolving, and in response, the teams must adapt. This requires re-examining how we select individuals for those teams. Simply put, what got us here will not get us there, and if we do not take time to honestly reassess the strengths and weaknesses of the current A&S models, we will be too slow to respond to the next rapidly emergent complex adaptive problem set. For these reasons, the Mission Critical Team Institute strongly recommends that military special operations teams transition to a community of praxis model for selection and assessment.



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About the Mission Critical Team Institute

MCTI is a collaborative inquiry research and professional development institute aimed at improving the success, survivability, and sustainability of Mission Critical Teams through invitational-only collaborative inquiry programs and onsite engagements. MCTI began as the Mission Critical Team *Initiative* in 2016 at the Wharton School, University of Pennsylvania. In 2018, the initiative transitioned into the independent Mission Critical Team® Institute. In partnership with our current Mission Critical Team collaborative inquiry community, within Military Special Operations (within the Five Eyes), Tactical Law Enforcement, Urban and Wilderness Fire, Emergency and Trauma Medicine, and NASA, we work with instructor cadres and team leadership to improve the human factor through exposure to current research and dialogue about current challenges and opportunities. Our efforts include:

- Applied Collaborative Research Community: To support our partners to develop more rigorous methods to solve current problems in a collaborative environment.
- Instructor Cadre Development Programs: Focused on sharing the theories and techniques related to the selection, teaching, and learning of future Mission Critical Team Operators.
- Custom Small-Team Leadership Programs: This program would be aimed at MCT operators entering leadership positions.
- Mission Critical Team Summit: held once a year and aimed at bringing the entire collaborative community together to explore emerging ideas, tools, and techniques related to further developing the Human Factor.
- Learning Observations and Review: On-site visits to our partners to observe and discuss current and future practice.

MCTI's Collaborative Inquiry Research Model and Peer Review Process

This paper was developed using a *Collaborative Inquiry* approach—conducting research with, rather than on, our partner teams. Guided by Kaupapa Māori engagement principles of initiation, benefits, representation, legitimation, and accountability¹, our process unfolds in the following stages:

1. Green Paper (Ideation & Representation): When we observe an emergent issue through our ongoing team engagements, we author a Green Paper—an initial exploration distributed to the MCTI community using the "unfinished principle" to invite maximum feedback and determine whether further investigation is warranted.
2. Gray Paper (Legitimation & Accountability): After incorporating community feedback and conducting rigorous academic research, the Green Paper evolves into a Gray Paper. This stage serves as our peer-review process, allowing team members, academics, and subject-matter experts to provide final comments or objections prior to publication.



3. White Paper (Final Stage): Following validation, the paper is reformatted as a White Paper and distributed to teams.
4. Findings are integrated into MCTI curriculum (updated every 6-12 months) and, when appropriate, shared publicly through formal publication and discussed on the MCTI *Teamcast* podcast.

This collaborative model ensures our research remains grounded in the real-world experiences of the teams we serve and provides them with immediately applicable tools and insights.

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¹ Bishop, R. (1999). *Collaborative storytelling: Meeting indigenous peoples' desires for self-determination in research*.