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Monterey, CA; Naval Postgraduate School

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**NAVAL  
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**MONTEREY, CALIFORNIA**

**THESIS**

**GRADUATE SCHOOL EDUCATION AS A RETENTION  
AND READINESS TOOL**

by

Mark A. Donovan and Kevin S. Sweet

December 2019

Thesis Advisor:  
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**GRADUATE SCHOOL EDUCATION AS A RETENTION  
AND READINESS TOOL**

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**MASTER OF SCIENCE IN DEFENSE ANALYSIS  
(IRREGULAR WARFARE)**

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## **ABSTRACT**

The U.S. Army Special Operations Command (USASOC) recently identified a retention problem among Special Forces Captains. A USASOC-sponsored survey sent to all active duty Special Forces Captains highlighted that many are considering leaving the Army at a crucial point, leaving the force depleted in terms of both quantity and quality of field grade officers; the same survey, however, also revealed the solution. Of the 163 respondents, there was a significant interest for increased civilian graduate school opportunities. While previous analysts provided broad suggestions to increase retention, this thesis specifically examines the solution of increased civilian graduate school opportunities. By analyzing the survey results as well as the recent Army directive regarding Command General Staff College attendance, this thesis finds that, to retain the most talented officers and ensure the continued readiness of the members of the 1st Special Forces Command, USASOC must improve its talent management by leveraging the most recent National Defense Authorization Act (NDAA) to offer graduate school education as a means of retaining its top-performing Captains. Doing so aligns with the 2018 National Defense Strategy guidance to ensure strong critical thinkers and problem solvers.



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## LIST OF ACRONYMS AND ABBREVIATIONS

ADE	Active Duty Enlisted
ADO	Active Duty Officer
AOC	Advanced Operational Credentialing
ARSOF	Army Special Operations Force
AY	Academic Year
CGSC	Command General Staff College
CGSS	Command and General Staff School
DOPMA	Defense Officer Personnel Management Act
GRADSO	Graduate School Additional Service Obligation
FY	Fiscal Year
H4D	Hacking for Defense
HSC	Headquarters Support Company
HRC	Human Resource Command
ILE	Intermediate Learning Education
JRTC	Joint Readiness Training Center
NCO	Non-Commissioned Officer
NDAA	National Defense Authorization Act
NDS	National Defense Strategy
NPS	Naval Postgraduate School
OCS	Officer Candidate School
ODA	Operational Detachment Alpha
OML	Order of Merit List
PCS	Permanent Change in Station
ROTC	Reserve Officer Training Corps
SF	Special Forces
SFAS	Special Forces Assessment and Selection
SFQC	Special Forces Qualification Course
SO	Special Operations

TDY	Temporary Duty
TM	Talent Management
TRADOC	Training and Doctrine Command
USASOC	United States Army Special Operations Command
USMA	United States Military Academy
XO	Company Executive Officer
YG	Year Group

## EXECUTIVE SUMMARY

In 2018, the Special Forces Regiment Future Readiness Officer designed an anonymous workforce sentiment survey and distributed it to every Year Group (YG) 2009, 2010, and 2011 SF Captain on active duty. The survey results confirmed what the Special Forces Branch had already noted: the number of Special Forces Captains considering leaving or choosing to leave military service negatively affects the retention rate of Special Forces Captains commonly referred to as 18As. Importantly, over the past year, Special Forces Captain positions throughout the Special Forces Regiment have already routinely been filled at only 70% capacity, leaving almost one out of every three Operational Detachment Alphas (ODA) without a Detachment Commander. If left unchecked, this failure to retain captains would likely affect not only individual ODAs, but also the quality of senior officers within the Special Forces Regiment. The retention problem is now being addressed at higher levels. However, with the recent directive to lessen rather than increase civilian graduate school opportunities for officers, the Army might be going in the wrong direction. Fortunately, the same survey may demonstrate a solution.

A Designing for Defense team—a substituent element of Hacking for Defense—from the University of Colorado at Boulder—reviewed the survey results and identified multiple reasons for Special Forces Captains decisions to leave the military. A short amount of time on an ODA as a Commander, a lack of mentorship from senior officers, and an overwhelming aversion to attending the United States Army Command and General Staff College (CGSC) to receive Advanced Operational Credit (AOC) all showed as significant. Multiple captains described how more time on an ODA, more proactive relationships with senior officers, and more opportunities to receive AOC, as well as a master’s degree, would have made or make them more likely to remain in the Army.

The 1<sup>st</sup> Special Forces Command recently enacted a significant change in the timeline of its Special Forces Qualification Course (SFQC), so that it can now be completed in under one year, which may increase the regiment’s ability to retain its officers. A shorter amount of time in the SFQC will increase the time that a Special Forces Captain serves during his first tour of the Special Forces Regiment from four years to five and a half years.



This additional time may allow Special Forces Captains to serve on an ODA for longer than the average 18–24 months currently experienced. Additionally, senior officers will have more time and a better opportunity to get to know their captains and provide more mentorship. Finally, Special Forces Captains can use the longer timeline on their first tour of a Special Forces Group to earn higher-level civilian education, or a master’s degree, through the application of a Graduate School Additional Service Obligation (GRADSO). The 1<sup>st</sup> Special Forces Command, therefore, finally has the opportunity to address the largest grievances of its Captains; now it simply needs to move forward and seize that opportunity.

This thesis analyzes survey results and the recent directive regarding mandatory minimum attendance at CGSC to provide recommendations on retention of Special Forces Captains to improve both quantity and quality of force readiness in a near-peer threat environment. The thesis finds that increased civilian education opportunities, specifically revisions to the GRADSO program, may well help increase retention of Special Forces Captains.

## I. OFFICER RETENTION WITHIN THE SPECIAL FORCES REGIMENT

Charged with conducting numerous and varied combat and non-combat operations in support of U.S. policies and objectives, the United States Army Special Forces (SF) Regiment<sup>1</sup> is among the most elite Special Operations (SO) groups, a critical element for U.S. national defense and security. For almost two decades, Special Forces Groups have deployed continuously in the wars in Iraq and Afghanistan, conducting operations that support U.S. interests worldwide. With ongoing conflict and instability in Syria and growing threats from near-peer adversaries, the Special Forces Regiment likely will continue to be consistently employed at a high operational tempo and remains a vital U.S. asset.

To continue to meet mission, the Special Forces Regiment must, therefore, take action to meet internal retention challenges. Active Duty Enlisted (ADE) and Active Duty Officer (ADO) numbers have fallen below the threshold of needs for a healthy Regiment. Within the U.S. military, the “18” series refers to special forces and “A” indicates officers, so that 18A refers to a Special Forces Officer. Of particular concern, according to the July 2019 monthly Special Forces Branch Update, over the last 13 months, the 18A Captain positions within the Regiment were routinely filled to only 70% of the captains-to-position rate.<sup>2</sup>

A lack of Captains within the Special Forces Regiment has been an ongoing concern. In 2018, the Special Forces Regiment Future Readiness Officer designed an anonymous workforce sentiment survey and distributed it to every Year Group (YG) 2009, 2010, and 2011 SF Captain on active duty.<sup>3</sup> One hundred and sixty three officers responded, and a Designing for Defense team—a substituent element of Hacking for

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<sup>1</sup> The 1<sup>st</sup> Special Forces Command (Airborne) is made up of Special Forces, Psychological Operations, and Civil Affairs Soldiers. This thesis refers specifically to Special Forces Soldiers within the 1<sup>st</sup> Special Forces Command (Airborne) and, therefore, will refer them as the Special Forces Regiment throughout.

<sup>2</sup> A.W. Simmons, “A Special Report on SF Talent Management,” *Human Resources Command Special Forces Branch Update* (01 July 2019): 1.

<sup>3</sup> Simmons, “A Special Report,” 5.

Defense (H4D)—from the University of Colorado at Boulder reviewed the results to provide recommendations for improved retention among Special Forces Captains.<sup>4</sup> The H4D study provides a broad understanding of why such a high number of Special Forces Captains are choosing to leave military service at the conclusion of their detachment leadership time. Although the results naturally varied, improving the Special Forces Regiment’s ability to conduct Talent Management (TM)—which this thesis defines as the ability to recognize, organize, and award talent appropriately—showed as the key to improving retention and, therefore, ensuring the ability to meet mission.

While the survey showed the problems, it also inherently contains a potential solution, which is the subject of this thesis. Crucially, by leveraging the National Defense Authorization Act (NDAA), the Special Forces Regiment can offer advanced civilian education opportunities to its most highly talented Captains. By doing so, the Special Forces Regiment may be able to increase retention as well as the overall talent at the field grade officer level and beyond.

## **A. WHY CAPTAINS?**

This thesis focuses on how to potentially retain Captains, rather than other levels of officers, within the Special Forces Regiment for several reasons. As of the writing, officers who have not yet reached the rank of Captain are not accepted into the Special Forces Assessment and Selection (SFAS) although a tentative proposal to change this standard exists. Officers who have been promoted to Major have already passed the ten-year mark in their military career, making highly unlikely the prospect of their leaving the military before a twenty-year period. Captains, however, have much more flexibility. The typical Special Forces Captain has ten years of military service at the conclusion of the first tour of a Special Forces Group. The decision to leave the military and pursue other educational and career opportunities at the natural transition point of ten years is still very feasible because the service obligation accrued upon graduation of the Special Forces Qualification Course (SFQC) is complete. Special Forces Captains, on average, have served for

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<sup>4</sup> Simmons, “A Special Report,” 5.

approximately four years in the conventional Army and have received over 18 months of specialized training during the SFQC. When a Special Forces Captain chooses to leave the military, the Army not only loses an officer with a wealth of experience, but it also loses a massive investment of time and financial resources. Perhaps most importantly, the inability to retain the most talented captains would likely eventually result in the reduction in quality of more senior Special Forces officers, thus weakening the Regiment. By strengthening its retention efforts of Captains, the Special Forces Regiment can ensure that a greater number of talented officers choose to stay in the Army at this crucial decision point in their careers.

## **B. POTENTIAL INITIATIVES TO FIX THE RETENTION PROBLEM**

The Special Forces Branch identified a particularly dangerous trend in the strength of Special Forces Captains pertaining to Officer Year Groups 2009, 2010, 2011, 2012 and 2013<sup>5</sup> and sought both internal and external solutions. The historically low number of officers to apply for and complete SF training in these year groups exacerbated the problem of an already low retention rate of Captains. Internally, the Regiment is now paying close attention to several initiatives that have arisen from the NDAA for fiscal year (FY) 2019. Externally, scholarly research such as the H4D study as well as this thesis has identified reasons for low retention among SF Captains as well as possible solutions.

### **1. U.S. Army Special Operations Command Talent Management Initiatives**

In May 2019, the Special Forces Branch unveiled several initiatives to increase the regiment's talent pool. The United States Army Special Operations Command (USASOC) is seeking to spearhead the use of FY2019 NDAA changes to reflect the Army Special Operation Forces's (ARSOF) specific challenges. However, the following congressionally-approved initiatives have not been approved by the Army. For example, USASOC is exploring options to include an alternative promotion system, a promotion opt-out, and a direct commission option. An alternative promotion authority may enable the Special Forces Regiment to open SFAS to First Lieutenants, thus expanding the number of

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<sup>5</sup> Simmons, "A Special Report," 1.

available officers able to enter the branch.<sup>6</sup> The NDAA also has authorized a promotion opt-out, which could allow Special Forces Captains to opt-out of promotion to Major, allowing them more time on an Operational Detachment Alpha (ODA).<sup>7</sup> Finally, the direct commission up to O-6<sup>8</sup> could be used to directly commission officers who had previously separated from military service, completed additional civilian education, and then desired to return as Majors. These initiatives may very well increase the number of available officers within the SF Regiment, but would likely have little impact on retaining the Captains already in the organization. The promotion opt-out does answer some of the main concerns reflected in the survey, specifically, the limited amount of time captains have to serve as detachment commanders. However, this initiative may have the opposite desired effect, decreasing retention by encouraging top officers to separate to attend higher level civilian education or pursue other professional career paths, knowing that they can always reenter the army if they choose. Additionally, the promotion opt-out may negatively affect the quality of officers available to fill O4 major billets, thus not solving the problem.

## **2. Hacking for Defense**

Several scholars from the University of Colorado at Boulder conducted the H4D study, examining the specific problem set of low retention among Special Forces Captains by interviewing over 40 personnel throughout the Special Forces Regiment as well as analyzing the USASOC sponsored survey of 163 active duty Special Forces Captains.<sup>9</sup> After analyzing the issue over a 15-week period, the H4D authors identified five broad solutions to retain more Special Forces Captains.<sup>10</sup> The suggested solutions for the Special Forces Regiment include: supporting a more human-centric culture; improving understanding through data collection; closing the communication gap; improving human

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<sup>6</sup> Mac Thornberry, *John S. McCain National Defense Authorization Act For Fiscal Year 2019* (Washington, DC, 2018), <https://www.congress.gov/bill/115th-congress/house-bill/5515/text>.

<sup>7</sup> Thornberry, National Defense Authorization Act.

<sup>8</sup> Thornberry, National Defense Authorization Act.

<sup>9</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management* (University of Colorado, Boulder, CO).

<sup>10</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 8.

capital management structures; and implementing programs to improve career choices.<sup>11</sup> While the H4D study highlighted specific issues that Special Forces Captains have cited as reasons for considering leaving or having chosen to leave the Regiment, its suggested solutions are extremely broad. This thesis's researchers agree with the H4D researchers on all of their main points regarding how the regiment can change the current culture from within to address some of the concerns they currently face. Simultaneously, we believe that a more direct approach to increasing retention would be to use civilian education opportunities to entice Special Forces Captains to continue serving, thus expanding the capability of field grade officers as well as creating more refined problem solvers while also potentially retaining top talented Captains.

### **C. WHY RETENTION IS FAILING AMONG SF CAPTAINS**

The H4D study identified multiple reasons that Special Forces Captains are leaving or considering whether to leave the regiment and the Army. A large number of Special Forces Captains noted an aversion to attending the U.S. Army's conventional Command and General Staff College (CGSC) in Fort Leavenworth, Kansas.<sup>12</sup> This aversion has to do with Special Forces Officers' desire to instead attend non-conventional Intermediate Level Education (ILE), such as the Naval Postgraduate School (NPS), sister service, foreign military, and civilian higher education institutions. Of note, beginning in 2020, a smaller number of Special Forces Officers will be permitted to attend NPS, exacerbating many Special Forces Captains' dismay.

The survey shows specific reasons for the aversion. Many surveyed Special Forces Captains highlighted the fact that the CGSC does not award a master's degree upon completion of its curriculum.<sup>13</sup> Second, attending CGSC means a limited amount of time in command of an ODA.<sup>14</sup> The Defense Officer Personnel Management Act (DOPMA)

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<sup>11</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 4–5.

<sup>12</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 25.

<sup>13</sup> A.W. Simmons, *Green Beret O-3 Talent Management – FEB19 Survey* (U.S. Army Special Operations Center of Excellence, 2019), 29.

<sup>14</sup> Simmons, *Green Beret O-3 Talent Management – FEB19 Survey*, 32.

of 1980 standardized officer personnel management across the military services,<sup>15</sup> creating a uniform timeline among officers, which, in turn, limits the amount of time a Special Forces Captain may spend in command. A recent initiative by Major General Sonntag, the previous Commander of the 1<sup>st</sup> Special Warfare Command, to significantly shorten the duration of the SFQC has the potential to solve this timeline dilemma as it would allow Special Forces Captains to serve on average over five years at a Special Forces Group as compared to the previous average of four years.<sup>16</sup> This additional operations time would provide the possibility for additional civilian education as well as a better opportunity for Special Forces leadership to conduct TM.

#### **D. TALENT MANAGEMENT (TM) AND EDUCATION – A BETTER WAY**

TM is the key to solving the Special Forces Regiment’s dilemma. As stated previously, the Regiment is responsive to solutions from internal as well as external sources. The H4D survey results overwhelmingly identified Captains’ desire for greater freedom in choosing a non-traditional ILE venue, attaining a master’s degree, and spending more time in Command of an ODA. This thesis examines how the Regiment can better support its Captains through the provision of higher education targeted at the most qualified performers within the Regiment. For this model to function properly, the Special Forces Regiment must leverage the NDAA and NDS to fund post-graduate education for its most talented Captains to, in turn, retain quality officers and positively impact the Regiment’s future senior leaders.

#### **E. LITERATURE REVIEW**

For as long as nation states have gone to battle against each other, thinkers have written about how to improve armies. U.S. history shows that armies that are capable and willing to evolve often end up continuing while those that fail to evolve often cease to exist. For example, the Germans ability to clearly see the benefits of the *Blitzkrieg* method of warfare very nearly resulted in the total annihilation of Europe during WWII, but, because

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<sup>15</sup> Tim Kane, *Total Volunteer Force* (Stanford: Hoover Institution Press, 2017): 43.

<sup>16</sup> Simmons, “A Special Report,” 2.

the United States and other Allied nations embraced new and experimental technology, Hitler was stopped. Writers have extensively considered the improvement of technology during WWII and continuing through the rest of the 20<sup>th</sup> century. However, the research does not delve as far into how a military, and the U.S. military specifically, could evolve its way of thinking about managing talent. The following literature review, therefore, examines the existing applicable literature and how this thesis addresses relevant gaps.

A body of literature does exist regarding how the U.S. military has reorganized itself. Much of this literature is macro level, such as the shift to an all-volunteer force after the Vietnam War. Some authors, typically former military officers, have also written about the need for a better talent management process within the U.S. military. In his *Accessing Talent: The Foundation of a U.S. Army Officer Corp Strategy*, Casey Wardynski strongly advocates for competing with the civilian labor market by improving current methods of officer retention.<sup>17</sup> Another former-military-officer-turned-author, Tim Kane, wrote several books illuminating the deficiencies within the U.S. military officer talent management process. Like Wardynski, Kane heavily references changing market dynamics in his assessment. He also focuses on the same areas as the vast majority of other authors on the subject: promotions, pensions, and the need for peer evaluations.<sup>18</sup> This thesis's researchers agree that the U.S. military's promotion system may indeed be outdated considering that very little incentive to outperform peers exists when officers continue to be promoted according to year group, rather than by performance. We also agree that peer evaluations may shine a brighter light on specific officers' competency where the evaluations of a senior officer may miss the daily performance of said officer. However, we believe that the recent change from only one 20-year retirement structure to a system allowing Soldiers to depart after a single term of service with a financial incentive may, in fact, lead to more Soldiers leaving the military sooner, adding to the retention problem.

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<sup>17</sup> Casey Wardynski, *Accessing Talent: The Foundation of a U.S. Army Corp Strategy* (Carlisle, Pennsylvania : Strategic Studies Institute, U.S. Army War College, 2010): 36.

<sup>18</sup> Tim Kane, *Total Volunteer Force* (Stanford: Hoover Institution Press, 2017): 110.



What is most lacking in the current retention literature, especially when it comes to Special Forces Captains, are specific steps to ensure that the most competent officers receive rewards and recognition for their efforts. The current restructuring of the SFQC sets the stage for a stronger TM system across Special Forces, especially as pertains to Special Forces Captains. This thesis, therefore, resources and cites extensively from documents originating from within the 1<sup>st</sup> Special Forces Command as well as surveys and studies focusing on how to retain Special Forces Captains. The thesis uses previous Commander of the 1<sup>st</sup> Special Forces Command MG Kurt Sonntag's *USAJFKSWCS Group Update* to help the reader visualize the SFQC restructuring.<sup>19</sup> Former Green Beret A.W. Simmons's work has also been instrumental in this thesis's work. His dedication to understanding why Green Beret Captains are exiting the Army in such large numbers proved essential in understanding Captains' motives for remaining or leaving the service.<sup>20</sup> University of Colorado graduate students Dan Warner, Geoffrey Lord, Ricardo Zorce, Thomas Karas, and Vincent Wroble developed several broad recommendations for retaining Special Forces Captains after reviewing the survey created by A.W. Simmons. Warner's study hinted at several recommendations developed further in this thesis, such as creating a stronger officer counseling system as well as paying greater attention to Special Forces Captains' desire to attend non-traditional military, ILE, master's degree producing institutions.<sup>21</sup>

Previous researchers have also paid significant attention to the benefits of competent talent management within military organizations. Former NPS graduate Brian Cook described how the Army could look towards civilian companies such as General Electric and mimic policies on accession, development, retention, and employment.<sup>22</sup>

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<sup>19</sup> Kurt L. Sonntag, *USAJFKSWCS Group Update* (U.S. Army Special Operations Center of Excellence, 2019).

<sup>20</sup> A.W. Simmons, *Green Beret O-3 Talent Management – FEB19 Survey* (U.S. Army Special Operations Center of Excellence, 2019).

<sup>21</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management* (University of Colorado, Boulder, CO).

<sup>22</sup> Brian S. Cook, "Getting It Right: Revamping Army Talent Management" (Master's Thesis, Naval Postgraduate School, 2015).[https://calhoun.nps.edu/bitstream/handle/10945/45829/15jun\\_cook\\_brian.pdf?sequence=1&isallowed=y](https://calhoun.nps.edu/bitstream/handle/10945/45829/15jun_cook_brian.pdf?sequence=1&isallowed=y)

However, the utilization of education as a tool in retaining Special Operations or other officers has mainly been written about by students in the process of attaining higher education themselves. Theses from military and civilian higher educational institutions serve as important sources and are referenced throughout this thesis. Of note, a former Naval Postgraduate School (NPS) student, Gregory Branigan, published a thesis entitled, “The Effect of Graduate Education on the Retention and Promotion of Marine Corps Officers,” in which he forcefully argued that the attainment of a post-graduate degree positively affects the retainment and promotion of Navy and Marine Corps Officers.<sup>23</sup> Branigan’s argument and underlying research clearly align with this thesis’s hypothesis that education is a retention and readiness tool for Special Forces Captains.

Researchers who have researched and attempted to solve the U.S. military’s retention and TM problems certainly help spotlight an important and wide-ranging issue. However, the peculiarities and complexities of the First Special Forces Command and specifically the 18A Special Force Officer retention problem require the attention of Special Forces personnel. Those that truly relate to and appreciate the experiences of SFODA members and the Captains who command them are most likely to solve this riddle. Having identified the research gap in previous literature regarding Captains, this thesis intends to provide more applicable recommendations.

## **F. RESEARCH DESIGN**

Following Chapter I’s introduction to the problem of Special Forces Captains leaving the Regiment at an alarming rate, which will eventually dilute or even decimate the quality of senior Special Forces Commanders, Chapter II describes how the new timeline for producing qualified SF Captains, combined with the additional time on an ODA, may contribute to a better TM process. The H4D study highlighted numerous instances in which Special Forces Captains felt that they were treated as simply numbers with very little ability to impact their own careers. Verbal and written counseling between senior and junior officers has often been conducted minimally or not at all. Unfortunately, a lack of

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<sup>23</sup> Gregory A. Branigan, “The effect of graduate education on the retention and promotion of Marine Corps officers” (master’s thesis, Naval Postgraduate school, 2001), v, <https://calhoun.nps.edu/bitstream/handle/10945/10846/ada390776.pdf?sequence=1&isallowed=y>

communication between junior and senior officers has led to a mismatch in future jobs and career opportunities, contributing to many Special Forces Captains exiting the Army. However, the shortening of the SFQC and the additional time that Captains would spend with a Special Forces Group may positively affect TM. Chapter III introduces our model, revamping the GRADSO option and using education as an incentive for retaining the top achievers within the Regiment. Chapter IV presents reflections and recommendations.

## II. OVERVIEW OF TALENT MANAGEMENT WITHIN THE SPECIAL FORCES REGIMENT

Following Chapter I's introduction of the Special Forces Captain retention problem, Chapter II provides a general understanding of the three main concerns that Special Forces Captains have given as reasons for leaving the Army: the need for additional operational time during a Captain's first tour of a SF Group, the desire for increased ability to earn civilian higher education, and the requirement for increased mentorship. It then addresses how an increased amount of time during a Special Forces Captain's first tour of an SF Group may alleviate those concerns.

On June 1, 2019, MG Sonntag's long overdue initiative to shorten the length of the SFQC went into effect, significantly reducing the course's length, as well as the length of SFAS. On average, captains will now be able to complete SFAS and the SFQC in under a year, compared to the previous timeline of two years.<sup>24</sup> This reduced training timeline gives the Special Forces Regiment the potential to address all three of the top reasons identified by its Captains as contributing factors in leaving the Regiment. First, the additional operational time that Captains will now have during their initial tour with a Special Forces Group may be utilized to obtain a civilian master's degree from a desirable and accredited university. Second, the additional time at Group will allow Captains to develop closer, more personal relationships with senior officers. These relationships, along with a greater command emphasis on officer counseling, serve two purposes: helping commanders to identify their top performers and giving field grade officers the ability to counsel captains, impressing upon them the possibility of desirable jobs within the Special Forces Regiment post-ODA Command. Finally, the additional time during a captain's first tour of a Special Forces Group may allow him to serve as a Detachment Commander longer than the current average of 18–24 months.

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<sup>24</sup> Kurt L. Sonntag, *USAJFKSWCS Group Update* (U.S. Army Special Operations Center of Excellence, 2019).

## A. WHY ARE SPECIAL FORCES CAPTAINS LEAVING THE REGIMENT?

As many reasons exist as there are Green Berets<sup>25</sup> for choosing to leave the SF Regiment. Family responsibilities as well as personal and professional goals within the civilian sector are often incompatible with the lifestyle of a Special Forces Soldier. The H4D survey results identified numerous reasons including frustration with military bureaucracy, lack of job satisfaction, and family concerns.<sup>26</sup> Addressing all of these concerns is naturally beyond this thesis's scope. However, after carefully reviewing the individual written responses within the survey, this thesis's researchers noted three general complaints. First, as mentioned in Chapter I, Special Forces Captains often have an aversion to attending the CGSC in Fort Leavenworth, Kansas. The aversion itself has many reasons, but, primarily, Captains seem dismayed at the lack of a civilian master's degree earned in conjunction with that institution's military ILE. Many Captains also reported a lack of formal and informal counseling by their raters and senior raters. This lack of mentorship contributes to the ignorance among many Special Forces Captains of many of the opportunities available for post-ODA Detachment Commanders when they promote to Major. Finally, Special Forces Captains want more time on a team. On average, Detachment Commanders spend 18–24 months in command of an SFODA. For many, the time spent as a Detachment Commander is the pinnacle of their career, thus a strong desire exists to increase the operations timeline.

### 1. Unappealing Intermediate Level Education Venues and Lack of Master's Degree Options

#### a. *Fort Leavenworth Command and General Staff College (CGSC)*

Annually, the CGSC provides ILE, through its Command and General Staff School (CGSS), to the majority of U.S. Army Majors, including active duty, reserve, National Guard, sister service, and interagency personnel.<sup>27</sup> The program's mission states that

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<sup>25</sup> Special Forces qualified Soldiers and Officers are awarded the distinctive green beret upon graduating from the SFQC, and are therefore, often referred to as "Green Berets."

<sup>26</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 8.

<sup>27</sup> "Command and General Staff School (CGSS)," United States Army Combined Arms Center, Accessed September 3, 2019, <https://usacac.army.mil/organizations/cace/cgsc/cgss>.

“CGSS educates field grade officers to be agile, innovative, and adaptive leaders within increasingly complex and uncertain environments.”<sup>28</sup> However, several surveyed Special Forces Captains believe that the conventional nature of a “Big Army” school curriculum, along with Soldiers from all branches of the U.S. Army, provides anything but an innovative and adaptive education.<sup>29</sup> Additionally, the survey indicates Captains’ sense that CGSC does not provide an attractive option for obtaining a master’s degree<sup>30</sup> since the ability to earn a Master’s of Military Art and Sciences Degree at CGSC means an additional requirement that students must work towards separately from their ILE workload.<sup>31</sup> These combined perceptions make this mandatory officer education unappealing to many Special Forces Captains, and many indicate desire to attend civilian graduate schools instead. Until very recently, the Special Forces Captains operational timeline was too short to allow this route. However, the increased operational timeline may now allow many of these officers to attend a civilian graduate school before completing resident ILE or while completing a satellite ILE course.

## **2. Naval Postgraduate School (NPS) and the Naval War College**

Since 2008, at NPS, U.S. Army Special Forces Officers have been able to earn a coveted master’s degree while simultaneously earning ILE accreditation through the Naval War College. However, after FY2020, the U.S. Army will no longer recognize the Naval War College Advanced Operational Credit (AOC) at NPS.<sup>32</sup> This controversial policy change may have been caused by a misunderstanding. A memorandum signed by the Secretary of the Army in May 2019 referenced NPS as a program that will no longer be accepted for AOC credit starting in Academic Year 21 (AY21).<sup>33</sup> However, NPS has never

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<sup>28</sup> United States Army Combined Arms Center, “Command and General Staff School (CGSS).”

<sup>29</sup> Simmons, “A Special Report,” 8.

<sup>30</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 25.

<sup>31</sup> United States Army Combined Arms Center, “Command and General Staff School (CGSS).”

<sup>32</sup> Mark T. Esper, “Army Directive 2019–19 (Credentialing Intermediate Level Education)” (Official memorandum, Washington, DC, Secretary of the Army)

<sup>33</sup> Esper, “Army Directive 2019–19 (Credentialing Intermediate Level Education).”

issued AOC credit. Rather, NPS students have received AOC credit through the Naval War College, which will continue to provide it.

If unresolved, this problem, whether a misunderstanding or otherwise, will likely create serious consequences for Special Forces Captains attending NPS. For those U.S. Army officers that continue to attend NPS, it will be necessary to attend a 12-week ILE satellite course at Fort Leavenworth after NPS graduation, lowering the number of Special Forces Captains who are able to attend NPS. Additionally, the USASOC has directed that 51% of all Special Forces Captains on the resident select list for Major must attend CGSC, another decision that will reduce the number of Special Forces Captains able to attend NPS.

### **3. Officer Counseling within the Special Forces Regiment**

Beyond concern with unappealing ILE venues and program problems, Special Forces Captains are also not receiving a sufficient amount of professional development from senior Special Forces officers. The H4D analysts noted that numerous Special Forces Captains reported a lack of formal and informal counseling by their raters and senior raters during their time as Detachment Commanders.<sup>34</sup> Although formal counseling is required and conducted between Captains and Team Sergeants, as well as between Team Sergeants and junior Non-Commissioned Officers (NCOs), formal counseling among officers is severely lacking within the Regiment, creating several dilemmas for Detachment Commanders. First, they are often unsure of their job security and of where they may end up after their time on an ODA. Second, they are often uninformed on what future positions are available within the Special Forces Regiment to Majors. Of survey respondents, 49 out of 53 Special Forces Captains who plan to exit the Army noted little opportunity to discuss their career goals and aspirations and limited mentorship.<sup>35</sup> Several of those wrote in their personal comments that they did not desire a position within the Special Forces Regiment post-Company Command.<sup>36</sup> A more formalized counseling system between junior and senior officers may serve to alleviate these concerns; more importantly, it would also likely

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<sup>34</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 19.

<sup>35</sup> Simmons, Green Beret O-3 Talent Management – FEB19, 11.

<sup>36</sup> Simmons, “A Special Report,” 12.

lead to many senior officers providing accurate information on what opportunities are available post-company Command. This information may ease the concerns of many Captains who fear being stuck in staff positions for the rest of their careers following a Company Command and better educate them on available benefits and opportunities post-Company Command.

#### **4. Short Amount of Time as a Detachment Commander**

Prior to June 1, 2019, the duration of the SFQC was anywhere between 18 and 24 months, possibly longer if a student recycled a phase. Because of DOPMA, which limited the amount of time that a Special Forces Captain can be operational before being promoted to Major, Special Forces Captains were often on a very tight timeline to graduate from SFQC, arrive at Group, command an ODA for 18–24 months, and then get out of the way so that the next Captain could replace them. Multiple Captains identified this short amount of time on an ODA team as a key reason for leaving the Regiment.<sup>37</sup> Several noted that the removal of the commander at 24 months does not allow Special Forces officers to gain maximum experience at the most important level of leadership within the Regiment.<sup>38</sup>

#### **B. HOW MG SONNTAG’S REVAMPED SPECIAL FORCES QUALIFICATION COURSE MAY HELP RETAIN SF CAPTAINS**

The condensed SFQC timeline may help the Regiment address its officer retention problem. By shortening the total amount of time that a captain spends in the SFAS and SFQC to under one year, Special Forces Captains will now have the opportunity to serve for over five years during their initial tour at a Special Forces Group.<sup>39</sup> The additional time on an initial tour may afford Captains the ability to obtain a civilian master’s degree before or during their ILE experience. The additional time may also encourage Special Forces Captains to develop closer relationships with their rater and senior rater, thus contributing to better communication and a more extensive knowledge of future positions within the

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<sup>37</sup> Simmons, Green Beret O-3 Talent Management – FEB19, 32.

<sup>38</sup> Simmons, Green Beret O-3 Talent Management – FEB19, 32.

<sup>39</sup> Simmons, “A Special Report,” 2.



regiment. Finally, additional time at group may equate to additional time commanding an SFODA. Figure 1 depicts the new SFQC timeline.

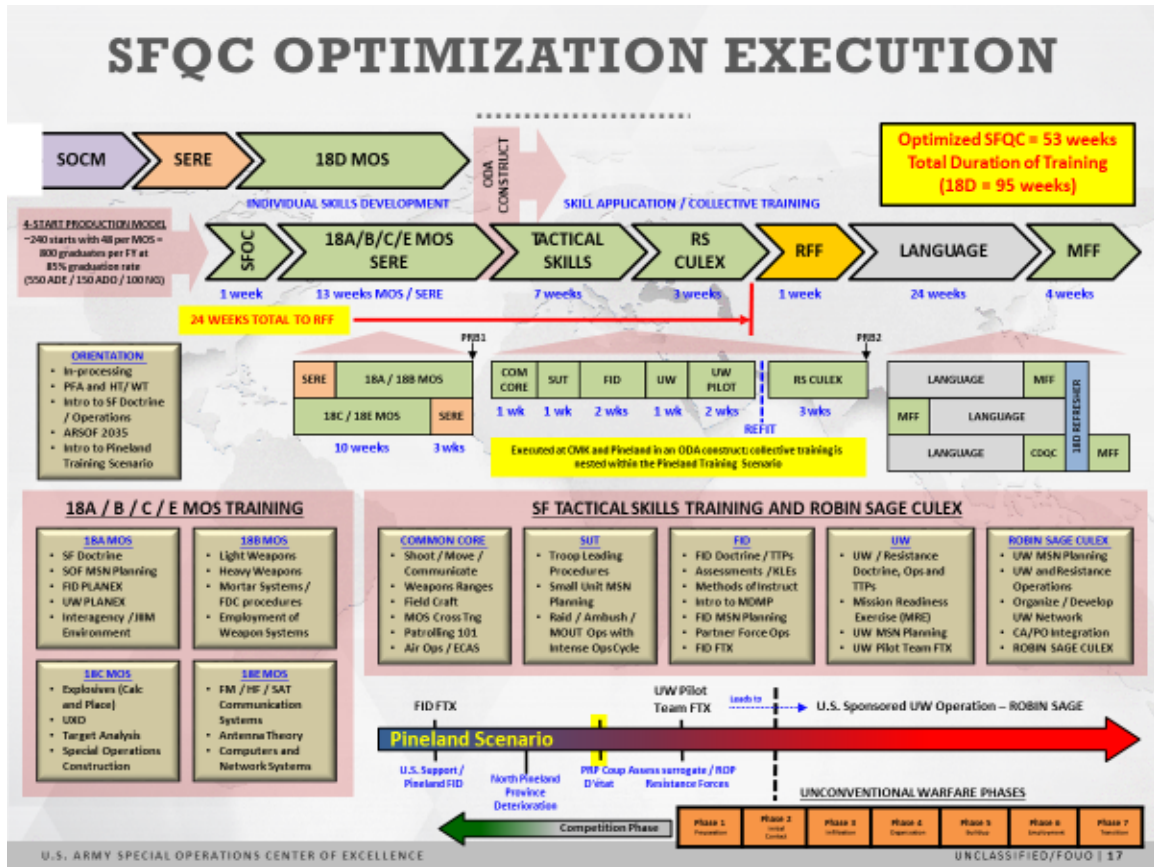


Figure 1. Approved Special Forces Qualification Course Timeline<sup>40</sup>

### 1. More Opportunities to Obtain Master’s Degrees

The additional time that Special Forces Captains will be able to spend at a Special Forces Group will allow top performers to compete for an opportunity to attend higher level civilian education, a retention issue noted by an overwhelming number of surveyed Captains. Of course, not all Special Forces Captains desire or will be able to attend higher level civilian education. Group and Battalion Commanders will be forced to identify early

<sup>40</sup> Source: Sonntag, USAJFKSWCS Group Update.

those top performers who both deserve and desire this incentive. However, the additional time will make it a feasible option. Although most Special Forces Captains do not have the exact same experience with the various positions that they fill during their initial Group tour, the previous four-year model was very standard, and, normally, a Captain would serve for 18–24 months as an ODA Commander. Their third and fourth years were often spent at Battalion or Group Operations, as a Company Executive Officer (XO), or as a Headquarters Support Company (HSC) Commander. These positions were often intermixed, and there were other opportunities to work at one of the Army Training Centers such as Joint Readiness Training Center (JRTC) in Fort Polk, Louisiana, or at the National Training Center (NTC) in Fort Irwin, California. This fairly standard four-year timeline then culminated with the Captain reaching a promotable status to Major and leaving the Group to attend an ILE venue. The increased timeline will allow Special Forces Captains to continue experiencing these important assignments while also allowing top performers more room to earn civilian education, further discussed in Chapter III.

## **2. More Time at Group May Lead to Better Relationships**

Additionally, the longer timeline will likely permit Special Forces Captains to develop closer relationships with their rater, senior rater, and other senior officers. The 5.5-year timeline will likely ensure that Special Forces Captains meet more senior officers and, ideally, develop more substantial relationships with them. These relationships can provide Captains with mentorship and guidance including information regarding future opportunities. At the bare minimum, the increased communication between Captains and senior officers may alleviate the Captains' career concerns as well as help senior officers better identify their top performing Captains. The Special Forces Regiment must take advantage of these relationship opportunities and revamp their officer mentorship and counseling standards. As stated earlier in this chapter, the H4D analysts noted that numerous Captains reported a lack of formal and informal counseling by their raters and senior raters during their time as Detachment Commanders.<sup>41</sup> The additional time may naturally provide the space for Captains to reach out to senior officers; ideally, Group

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<sup>41</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 19.

leadership could develop a formal system of encouraging senior officers to mentor young Captains.

### **3. More Time on a Team**

Young Army officers who are willing to attend SFAS and then commit to the SFQC are most often very driven people, coming from all types of backgrounds including from both the public and private sectors. In addition to a shared desire to serve their nation, many often join Special Forces in order to command an ODA. The time spent leading an ODA is not just more enjoyable than other positions; it is where a Special Forces officer learns how ODAs operate and their capacities, essential knowledge for senior officers within the Regiment. The greater amount of time that a Captain serves on an ODA directly contributes to a greater amount of knowledge going forward into Company and Battalion Command positions. With a 5.5-year window, an ODA Commander could remain in that position for between 2.5 and 3 years and also attend a civilian graduate school program after his time in Command is complete. The additional time on a team will also likely vastly increase an ODA Commander's knowledge and competence at the tactical level, and it will also better prepare him to command at the Company and Battalion level, further ensuring overall mission success.

### III. EDUCATION

Following Chapter II's examination of why Special Forces Captains may choose to leave the military, Chapter III focuses on how improving the TM model within the Regiment and leveraging the NDAA to fund advanced civilian education opportunities can increase retention of talented captains as well as improve force readiness by molding refined critical thinkers and problem solvers. This thesis specifically defines force readiness as the ability of Special Forces elements from the Group level down to the individual ODA level to react to and solve complex problems in a changing world dynamic, one that brings near-peer competition and potential peer conflict into the realm of possibility, a need highlighted by the 2018 NDS.<sup>42</sup>

Special Operations holds its "Truths" dear, and the SOF Truths assert that humans are more important than hardware and that quality is more important than quantity.<sup>43</sup> If the regiment holds these truths as key for success, then using education as a tool to retain officers and broaden the way in which young field grade officers approach problem sets remains fundamental. In the April 2019 SWCS way ahead and optimization brief, Commander MG Sonntag states that "judgment and decision making are paramount, therefore the regiment must select those that can operate on tomorrow's battlefield."<sup>44</sup> Additionally, he notes that the 1<sup>st</sup> SFC(A) highest expectation of green berets is to be critical thinkers and problem solvers.<sup>45</sup> Being a critical thinker and a problem solver is a continuous process refined over time through experiences, lessons learned, and furthered education. Therefore, expanding the educational opportunities available to SF Captains only further supports regiment priorities. Additionally, the NDS specifically calls for TM as relates to advanced civilian education: "Developing leaders who are competent in

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<sup>42</sup> Department of Defense, *Summary of the 2018 National Defense Strategy of the United States of America* (Washington, D.C.: January 2018).

<sup>43</sup> Collins John "United States and Soviet special operations" CRS 1987 Collins, John, *United States and Soviet Special Operations*, CRS (Washington, DC: Congressional Research Service, 1987), <https://catalog.hathitrust.org/Record/002771136>.

<sup>44</sup> Sonntag, USAJFKSWCS Group Update, 21.

<sup>45</sup> Sonntag, USAJFKSWCS Group Update, 21

national-level decision-making requires broad revision of talent management among the Armed Services, including fellowships, civilian education, and assignments that increase understanding of interagency decision-making processes, as well as alliances and coalitions.”<sup>46</sup> Currently, promotable captains or junior majors have only four options to obtain an advanced degree including attending NPS or the National Defense University in Ft. Bragg, North Carolina; simultaneously attending graduate school while attending CGSC; or the very limited chance of receiving highly competitive Olmstead or Downing scholarships. Only if a service member chose the option to utilize the graduate school additional service obligation (GRADSO) upon commission into the military would they have the GRADSO option, meaning a person would not be afforded that option later in their career. Previously, only officer candidates at their commissioning source of Reserve Officer Training Corps (ROTC), Officer Candidate School (OCS), or the United States Military Academy at West Point (USMA) could choose this option.

Creating an additional obstacle, in August 2019, USASOC presented an initiative to send a minimum of 51% of all resident-select SF officers to CGSC. This initiative is moving the regiment in the wrong direction if it means to accord with the 2018 NDS:

Professional Military Education (PME) has stagnated and has focused more on the accomplishment of mandatory credit at the expense of lethality and ingenuity. We will emphasize intellectual leadership and military professionalism in the art and science of warfighting, deepening our knowledge of history while embracing new technology and techniques to counter competitors. PME will emphasize independence of action in warfighting concepts to lessen the impact of degraded/lost communications in combat. PME is to be used as a strategic asset to build trust and interoperability across the Joint Forces and with allied and partner forces.<sup>47</sup>

Following 2018 NDS guidance, the regiment can accomplish multiple objectives. First, broadly educated field grade officers returning to the regiment will likely spur ingenuity and innovation, providing an asset to commanders in complex problem solvers. By sending

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<sup>46</sup> Department of Defense, Summary of the 2018 National Defense Strategy of the United States of America (Washington, D.C.: January 2018), 8

<sup>47</sup> Department of Defense, Summary of the 2018 National Defense Strategy of the United States of America (Washington, D.C.: January 2018), 8

young officers to different educational institutions, the organization will have master's level experts in an array of subjects and disciplines, field grade officers ready to solve complex problems with various critical-thinking-heavy approaches.

While the decision to send the majority of officers to CGSC will undoubtedly positively impact the art and science of warfighting in the conventional military context, it may mean a decrease in ingenuity and innovation. Currently, NPS is the best option for those officers looking to further their knowledge base, expand their understanding of the joint environment, and research the complexity of our nation's dynamic national defense priorities. NPS President Dr. Ann Elisabeth Rondeau recently stated that graduates from NPS are people "who ask fundamentally different questions about the nature of Global Competition, think differently about the application of the military instrument, and can effectively lead the Joint Force under the conditions of ambiguity [that] is commonly below the threshold of large scale operations."<sup>48</sup> To support the 2018 NDS's goals and U.S. strategy more generally, we need more professional innovative, ingenuitive military strategists, not less.

#### **A. EDUCATION AS A RETENTION TOOL**

Following DOPMA guidelines, the timeline for SF officers to attend ILE directly aligns with the expiration of the service obligation that an officer accrues after the completion of the SFQC. For many Captains, this point in time will be the one where they decide whether or not to transition out of the military. The 163 officers who completed the H4D survey represent 53% of the total population of 306 active duty year group's 2009, 10, and 11.<sup>49</sup> Figure 2 depicts the 153 responses to the question of which ILE option they selected or will select. Sixty-six percent selected NPS as their top selection.

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<sup>48</sup> Naval Postgraduate School, "An Operator's Perspective. Leveraging Education for SOF Advantage," January, 2019, 3.

<sup>49</sup> Simmons, "A Special Report," 5.

## Q10: Which ILE option did you / will you apply to (select all that apply)?

Answered: 153 Skipped: 9

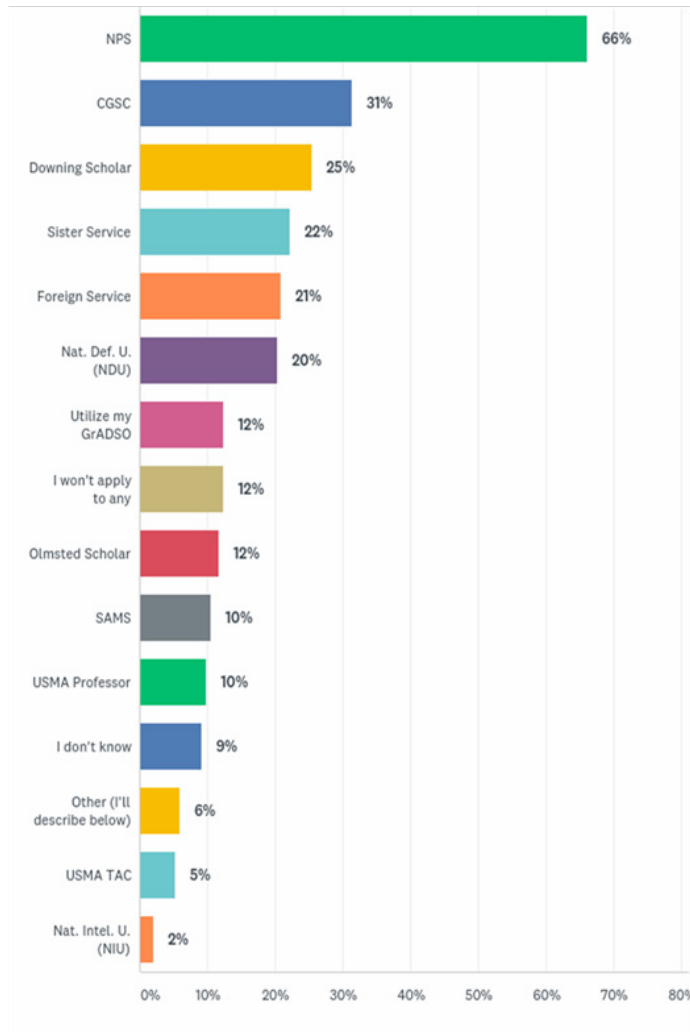


Figure 2. Intermediate Level Education Preferences<sup>50</sup>

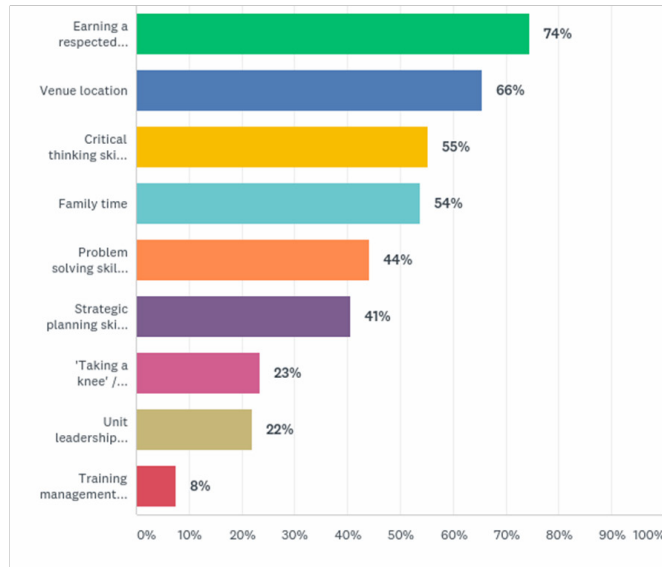
The next question, shown in Figure 3, regards the reason for the selection and supports this thesis's argument; of the 145 responses, 108 selected "earning a respected degree" as their top choice.

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<sup>50</sup> Source: Simmons, Green Beret O-3 Talent Management – FEB19 Survey.

### Q11: Why did you / will you apply to your first-choice ILE program (check all that apply)?

Answered: 145 Skipped: 17



ANSWER CHOICES	RESPONSES	
Earning a respected graduate degree	74%	108
Venue location	66%	95
Critical thinking skills improvement	55%	80
Family time	54%	78
Problem solving skills improvement	44%	64
Strategic planning skills improvement	41%	59
'Taking a knee' / resetting from operational tours	23%	34
Unit leadership skills improvement	22%	32
Training management skills improvement	8%	11
<b>Total Respondents: 145</b>		

Figure 3. Determining Factors for ILE Preference<sup>51</sup>

<sup>51</sup> Source: Simmons, Green Beret O-3 Talent Management – FEB19 Survey.



The next top four selections—“venue location,” “critical thinking skills improvement,” “family time,” and “problem-solving skills improvement” —also support using education as a retention tool. Senior military leaders are often critiqued as being disconnected from the views of the force; obviously, leadership decisions have lasting impacts on the regiment as a whole and thus require great care. Special Forces Captains and Majors make up a majority of the SF regiment’s officer population in the SF regiment; thus, leaders would be wise to take steps—even those that are hard, that cost a bit more, or that do not align perfectly with their views—that offer the highest return on investment for the good of the force. The human capital investment is the most important aspect of the Special Forces Regiment, vastly more so than any piece of equipment, and education is the foundation of the civilian workforce, which makes innovative strides well past that of the military. The DOD even leverages civilian corporations to solve complex problems for them. So why, given the NDAA authorization and a need specifically called for in the 2018 NDS, would the regiment seek to do anything other than expand educational opportunities for its current and future leaders and decision-makers?

Additionally, concerning the initiative to require 51% of resident select officers to attend ILE at the CGSC, Figure 4 shows a negative impact to the force.

**Q12: Senior Army leaders are currently considering changes to ILE slating policies. If CGSC became a mandatory ILE venue for officers selected for Resident ILE (the top 55% of the OML in the promotion board to O-4), it would impact my likelihood of continuing to serve in the SF Regiment as a field grade officer:**

Answered: 151 Skipped: 11

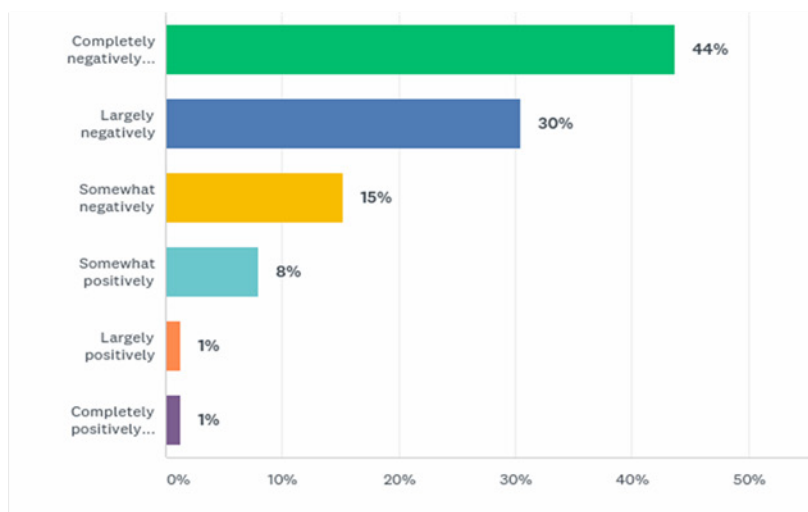


Figure 4. Effects of ILE Changes<sup>52</sup>

Of the 151 officers who answered the question, 44% stated that the decision would “completely negatively” affect their decision to continue to serve the regiment as a field grade officer. Another 30% stated that the decision would “largely negatively” impact their decision, and only 2% total answered either “largely positively” or “completely positively.” Although the survey is limited to three-year groups of officers, the survey clearly shows that, if the regiment continues toward this policy change, talented officers will likely leave the force to pursue other career opportunities. Leaders would be well-advised to analyze true costs and consider other solutions to retaining top talent, especially so that captains who are serving as detachment commanders today will be battalion commanders and senior leaders in the next 6–10 years.

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<sup>52</sup> Source: Simmons, Green Beret O-3 Talent Management – FEB19 Survey.

The current system for identifying top talented officers is the officer evaluation report (OER), a subjective model. As Tim Kain points out, OERs are often inflated.<sup>53</sup> Peer evaluations are often utilized as a good measure of performance. Throughout the entire SF qualification course, peer evaluations are utilized as a tool to identify those that are top performers as well as those who are not seen as “behind the scenes” quality officers. Figure 5 shows a critical point: many current junior leaders perceive that the highest-quality and talented captains, their peers, are not being retained for future service as battalion commanders and senior leaders.

**Q14: In your observation and experience, is the SF Regiment retaining your highest-quality peers for future service as SF Battalion Commanders and beyond?**

Answered: 153 Skipped: 9

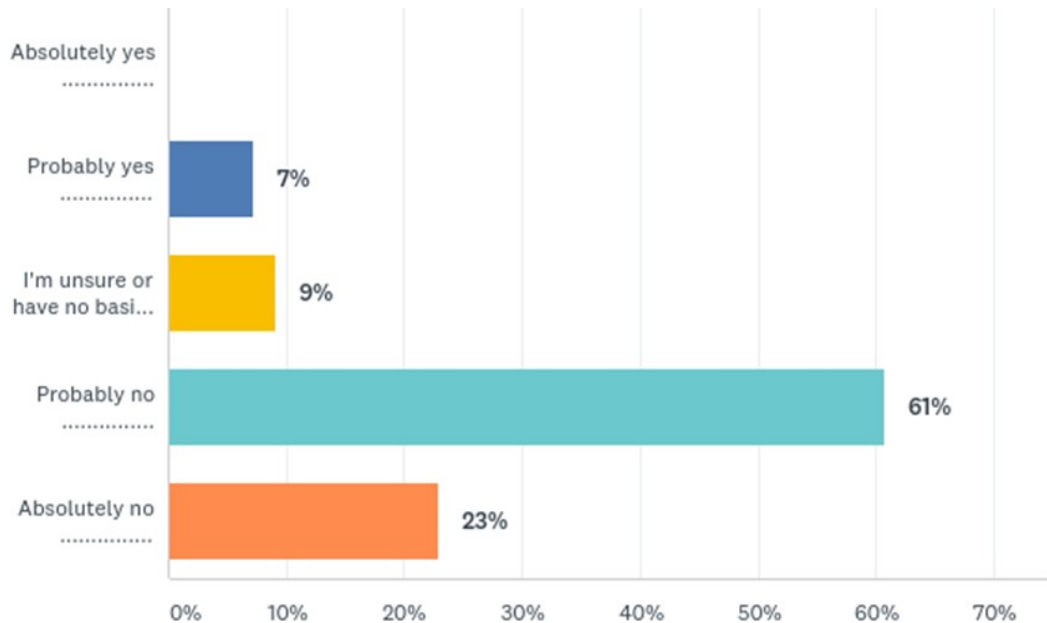


Figure 5. SF Regiment Talent Retention.<sup>54</sup> (Continued on next page.)

<sup>53</sup> Kane, *Bleeding Talent*, 85.

<sup>54</sup> Source: Simmons, Green Beret O-3 Talent Management – FEB19 Survey.

ANSWER CHOICES	RESPONSES	
Absolutely yes ..... all or almost all of my best peers stay in the Regiment	0%	0
Probably yes ..... many or most of my best peers stay in the Regiment	7%	11
I'm unsure or have no basis to judge	9%	14
Probably no ..... many or most of my best peers leave the Regiment	61%	93
Absolutely no ..... all or almost all of my best peers leave the Regiment	23%	35
<b>TOTAL</b>		<b>153</b>

Figure 5 (continued from previous page)

Of the 153 respondents, 128 answered “absolutely no” or “probably no” as to whether the regiment is retaining the highest-quality captains who will serve as battalion commanders. Responses to questions 10, 11, and 12 demonstrate reasoning for the question 14 responses and show that TM is essential for the future of the force. The SF Regiment can leverage every means possible to retain the highest-quality officers. ODAs, the foundation of Special Forces, deserve leaders for top performance, and the regiment can strive to implement policies that will increase retention of high-quality officers, more even than there exist billets to place them. Having analyzed the survey results, this thesis’s researchers posit that, yes, affording the best officers with opportunities to attend advanced degree institutions as part of ILE will increase retention.

## B. THE GRADSO

The Army GRADSO policy guarantees that an officer can attend a civilian university to attain a graduate degree if agreeing at the time of commission to an additional service obligation of three years to every one year spent in the program; however, the Army has currently suspended the GRADSO program for the 2014 and beyond year groups pending officer corps reshaping efforts.<sup>55</sup> Future SF captains will, therefore, not be afforded this opportunity. Since earning a respected master's degree is one of the top priorities of current captains, a GRADSO for only the top-performing officers may well bolster retention of the highest performing officers, who would then remain in the regiment until the 16-year mark of their career.

Significantly, according to the July 2019 SF Branch Update, there may not be enough post-ILE Majors available for assignment at the operational Groups and the talent bench for future battalion commanders for years to come may be decimated.<sup>56</sup> Offering GRADSOs to top-performing officers would likely increase retention:

The march of the current up-or-out promotion system means that it is difficult for non-accessions branches (like SF) to solve production gaps after they've occurred. Our current active duty officer (ADO) shortfall is merely the first act of what will likely be years of small 18-series year groups...year groups '09, '10, '11, '12, and '13 will all, SF Branch assesses, fall short of what is deemed a 'healthy' post-ILE cohort of SF majors that allows the branch to fill all 18A O-4 SF Group billets (plus some), as well as USAJFKSWCS, interagency, and billets in conventional force (CF) units across the Army. Absent significant reform, SF Branch will, starting next year, be institutionally obligated to fill CF headquarters billets with SF majors at the expense of the operational Groups, decreasing the raw number of majors assigned to each SF Group while significantly constraining the Regiment's talent bench for battalion commanders (and beyond) for years to come.<sup>57</sup>

Figure 6 depicts the problems inherent in the year groups versus goals.

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<sup>55</sup> Department of the Army, "Chart Your Course, Career Satisfaction Program," January 8, 2019, <https://www.career-satisfaction.army.mil>.

<sup>56</sup> Simmons, "A Special Report," 11.

<sup>57</sup> Simmons, "A Special Report," 11.

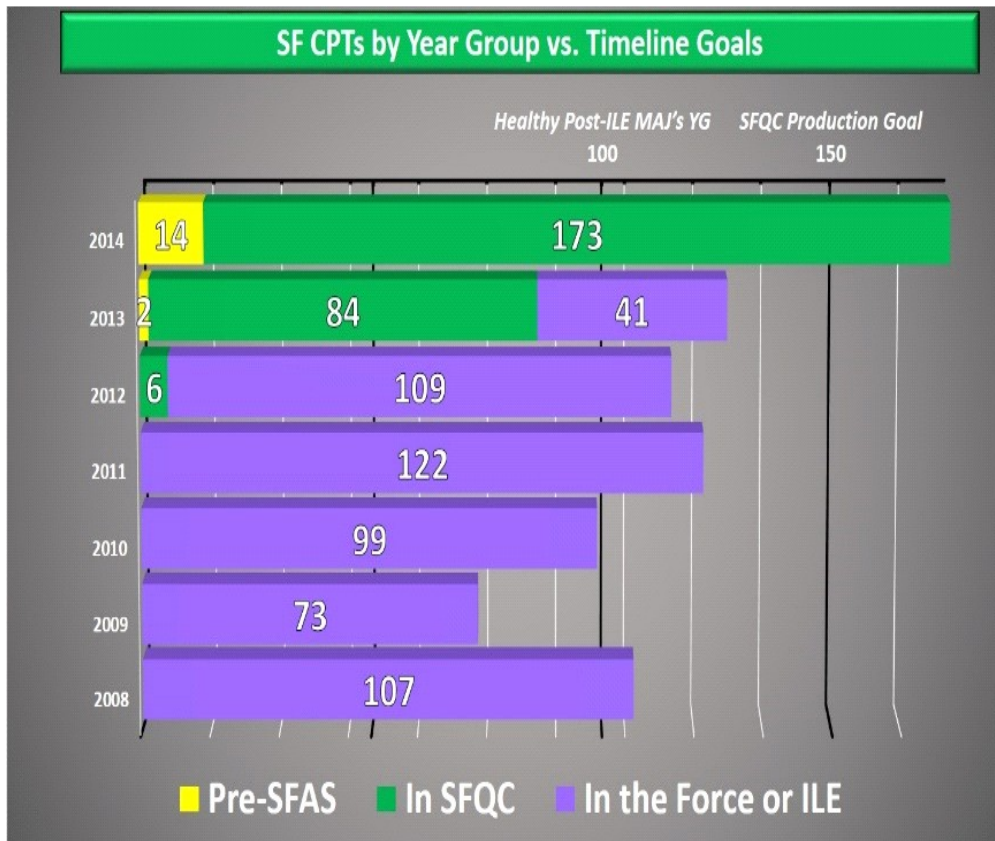


Figure 6. Totals of SF-Controlled Officers by Year Group as of May 2019<sup>58</sup>

### C. UNDESIRABLE ASSIGNMENTS

The GRADSO option could also be offered to those Captains who are selected to serve in an undesirable assignment. According to the H4D summary, location assignments had a heavy impact on retention.<sup>59</sup> Senior captains who are post ODA command time are often pulled to fill mandatory billets that are not always at a desirable location or otherwise negatively impact the officer’s family. With ILE already forcing a permanent change in station (PCS), the timeline of these assignments is often more than the service member is willing to accept. The primary example is an assignment at the Joint Readiness Training

<sup>58</sup> Simmons, Green Beret O-3 Talent Management – FEB19 Survey.

<sup>59</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 28.

Center located at Ft. Polk, Louisiana. According to the H4D summary's anecdotal discussion with current SF officers, "all six of the most recently selected captains who were assigned to move to Ft. Polk are leaving the service."<sup>60</sup> The summary offered three main reasons why the assignment is problematic: "first, it is in a remote location that most individuals do not desire to live. Secondly, its remoteness impacts the service member's family and their spouse's career. Third, the job at Ft. Polk is viewed by Captains as providing little to no benefit to the Army, the SF Regiment, or the service member themselves." When these reasons coincide with a natural transition point, they become that much more significant and that much more likely to negatively impact retention.

In addition to offering a GRADSO to those at the top of the order of merit list (OML), GRADSOs could be extended to those who have been identified as moving to Ft. Polk or other stations that HRC designates as undesirable. Had they done so, they may well have had six more captains who would have become field grade officers.

#### **D. CREDENTIALING INTERMEDIATE LEVEL EDUCATION**

On 22 October 2018, General Stephen Townsend, Commander of Training and Doctrine Command, sent an official memorandum to the Chief of Staff of the Army on ILE Credentialing, communicating the current situation and his concern as well as his recommendation for a solution going forward. Section D focuses on the General's memorandum and the directive that followed, highlighting some of the disconnect between the consensus of the General Officers and field grade officers currently serving in the SF Regiment. This is based off the comments received in the survey of active duty SF officers, conducted by the SF HRC Future Readiness Officer. General Townsend's memorandum summarizes the following:

1. Situation. Too many of our Army field grade officers are graduating from non-warfighting academic programs, receiving Advanced Operations Course (AOC) credit without the education, and entering their most important key and developmental positions without learning the fundamentals of large-scale ground combat operations at the organizational level. Meanwhile, the staff groups at CGSC suffer from suboptimal small group distribution (lack of

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<sup>60</sup> Dan Warner et al., *The Future of U.S. Army Special Forces Talent Management*, 10.

operations and intelligence officers and too many special branch and functional officers). The siphoning of talented basic branch officers to these programs limits the level of warfighting focus rigor in the small groups. Worse, to fill the empty seats at CGSC, we send scores of officers who were not board selected for the resident course.<sup>61</sup>

General Townsend highlights that officers who applied for and were selected to attend “non-warfighting” academic programs do not obtain the proper education to serve as field grade officers operating at the organizational levels.

The problem does not seem to be actually about the other institutions; rather, the problem seems to be that CGSC does not, as is, have the necessary rigor. The memorandum highlights a key factor in the decision to not grant AOC credit to academic institutions outside of CGSC: the staff groups at CGSC suffer from suboptimal small group distribution. “The siphoning of talented basic branch officers to these programs limits the level of warfighting focus rigor in the small groups. Worse, to fill the empty seats at CGSC, we send scores of officers who were not board selected for the resident course.”<sup>62</sup> Seemingly, the problem lies then not with other academic institutions but, rather, with talented officers, specifically Special Forces Officers, going elsewhere, bringing down CGSC’s “warfighting focus rigor” by lessening the group’s experience. In a way, then, not only does that not bode well for the Captains that need a rigorous environment to challenge them to solve complex problems, the general’s argument seems to validate this thesis’s point that diverse experiences are fundamentally important to the warfighter and encourage attendance in more than one environment to strengthen the regiment as a whole.

Additionally, the memorandum’s miscommunication regarding AOC credit will likely cause problems.

2. Recommendation. By approving the attached directive to rescind AOC credit for the non-warfighting programs and prioritizing functional area and specialty branches to Satellite CGSC, HRC will be able to send enough basic branch officers to the resident CGSC course to achieve the synergy required to achieve the outcomes that commanders expect from their FG officers. These changes restore the CGSC experience to a level required to meet the

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<sup>61</sup> Stephen J. Townsend, section 1: Situation.

<sup>62</sup> Stephen J. Townsend, section 1: Situation.



demands of large-scale combat operations against a near-peer adversary IAW the *2018 National Defense Strategy*. Our plan is to make a partial course correction this academic year and a full correction by AV 20–21.<sup>63</sup>

Rescinding credit for schools including NPS does not work when they never granted AOC credit<sup>64</sup> directly in the first place.

Figure 4 (previously shown) also shows that, of the 151 respondents, most officers would negatively perceive this decision. Forty-four percent stated that the decision would “completely negatively” affect their decision to continue to serve the regiment as a field grade officer, and another 30% stated the decision would “largely negatively” impact their decision. Again, only a total of 2% answered that the decision would positively impact their retention decision. Senior Special Forces can communicate the potential detriment to senior Army officials and to the Secretary of the Army.

Further, the memorandum goes on to recommend an increased number of programs at the CGSC, which would seem to contradict the idea of having larger, more diverse groups.

3. At the 4-Star General Officer Conference on 27 September 2018, I presented these findings and the proposed changes recommended by the Combined Arms Center Commanding General and Army University. All our 4-stars concurred and supported the proposal. The CSA also concurred but directed we answer five questions before final approval. The questions and answers follow:<sup>65</sup>

Question 1. Will this fix swing the pendulum too far? No: starting next summer, broadening and Master’s Programs will still be filled with the same quality of officers. For basic branch officers that participate in other broadening programs in the future, they will either attend satellite intimate Level Education and AOC via Distance Learning or attend resident CGSC after the broadening program. The option selected is determined by HRC based on the officer’s timeline to ensure they have adequate time to complete two KD positions prior to their CSL board. In future selection boards (Academic Year 21 and beyond), DMPM (DA G1) will establish

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<sup>63</sup> Stephen J. Townsend, section 2: Recommendation.

<sup>64</sup> Esper, Mark T. Army Directive 2019-19. 29 May 2019. Section 3a.

<sup>65</sup> Stephen J. Townsend, section 3.

objectives to ensure we select the right quality and branch distribution to meet all requirements.<sup>66</sup>

The recommendation does not seem, therefore, likely to achieve its own goal to avoid filling empty seats with board-selected students. The small group problem becoming larger would be exacerbated within the SF Branch where the number of captains is much lower than that of the conventional force. The HRC survey makes clear that Captains desire opportunities to advance their education and to improve their critical thinking skills, so taking away those opportunities will likely cause an exodus of captains that may well have otherwise remained in the service. Therefore, in the upcoming years, if the survey data stands true, the regiment will experience a significant loss of talent and potentially an even worse critical shortage of majors to fill mandated billets. Worse, the loss will likely result in a snowball effect, decreasing force readiness across all Special Forces Groups.

The memorandum also considers whether the decision to send more officers to CGSC will disadvantage officers or damage relationships with the other academic institutions; it posits that it will not due largely due to satellite options.

Question 2. Will we disadvantage officers already in these programs? No; all officers currently in these programs will be grandfathered IAW the Army Directive.<sup>67</sup>

Question 3: Will we damage the relationships with some of these educational institutions? No; we will still fill programs with same number and level of quality officers. For the OCLL, Olmsted, and JCS Intern programs, HRC will still select and send the exact same distribution of officers by quality and branch. Since OCLL, JCS, and Olmsted candidates are selected prior to being promotable. there is time for them to still attend resident CGSC after completion of the program and prior to follow on KD positions. If their timeline does not support resident CGSC, they will complete resident satellite and AOC via DL For other broadening programs (NPS, NDU, WM, etc.), HRC will still select the same level of quality officers but use these programs for a resident experience for a greater number of specialty and functional officers where it can serve as their credentialing course when coupled with Satellite ILE. The shorter Satellite 1LE without AOC was developed and originally intended for Specialty and Functional Area

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<sup>66</sup> Stephen J. Townsend, section 3a.

<sup>67</sup> Stephen J. Townsend, section 3b.

Officers-we will go back to primarily targeting these populations for satellite attendance.

Question 4: Will we send lower quality officers to the fellowships? No; as outlined above, we can still send our top-quality officers from the basic branches, functional areas, and specialty branches to the various programs. However, for basic branch officers, they will have to attend CGSC resident after the program or complete the credentialing requirement through AOCDL.

Question 5: Can we expand satellite ILE to include AOC? Not recommended; if AOC were added to the Satellite course it would be almost the same length as the resident course and would require significant instructor and facility increases. This is expensive and of little benefit since we have the required capacity at the resident course at Fort Leavenworth and it would not save officers any appreciable time.<sup>68</sup>

However, that does not address the major concern of decreased family time. For an officer to successfully complete the mandated resident CGSC or satellite course following the completion of a broadening program or fellowship, he must PCS with their family multiple times over a relatively short period of time. This directive does not take into account spouses' careers or the inconvenience and burden placed on the service member if, for instance, they will need to remove their children from school mid-year to complete the mandated CGSC requirement.

I fully support this initiative. Re-balancing the right officers in the right PME is a critical step to restoring intermediate level PME to meet the warfighting rigor required to defeat near peer threats in MOO. With this shift, we will also lead the Joint Force in meeting the PME requirements outlined in the National Defense Strategy.<sup>69</sup>

Despite critical concerns, Army Directive 2019–19 (Credentialing Intermediate Education) was published on 28 May 2019, signed by now Secretary of Defense Mark T. Esper, making the general's recommendations policy and making it more important than ever that regiment leadership examines closely the potential negative impacts on the future of the force.

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<sup>68</sup> Stephen J. Townsend, Section: 3 d-e, 4.

<sup>69</sup> Stephen J. Townsend, Section: 3 d-e, 4.

Consistently tasked with being problem solvers in all areas of U.S. foreign policy, special forces officers need the best education possible, and the United States needs the most talented SOF force it can possibly achieve. Crucially, while the consensus of the General Officers that all army officers should attend ILE at CGSC to “meet the warfighting rigor required to defeat near peer threats in modern day operations” is nested in the idea that warfighting is straightforward and requires only the education provided by army doctrine, leaders need to consider that, because warfighting in SOF happens across all domains, diplomatic, information, military, and economic, having officers with diverse educational backgrounds provides senior officers with complex problem solvers capable of adapting to the multitude of current and future potential threats.

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## IV. CONCLUSION

This thesis finds that, yes, education is a key to retention of Special Forces Captains, and that, yes, the words of Special Forces Captains themselves have both demonstrated the retention problem and also pointed the way to a solution: increased civilian education opportunities particularly through GRADSO. One hundred and sixty-three Special Forces Captains from the First Special Forces Command (Airborne), composed of year groups 2009–2011, responded to a workforce sentiment survey sent out by the Special Forces Regiment Future Readiness Officer in 2019. Researchers from a Designing for Defense team, part of Hacking for Defense (H4D) reviewed the results as did internal personnel throughout the Special Forces Regiment. Although the Special Forces Captains gave a vast array of reasons as to why they may exit the Army, three common themes stood out: they almost universally grieved on a perceived lack of time on an ODA as a Detachment Commander, they highlighted a lack of mentorship from senior officers that contributed to confusion, and they described an aversion to being forced the U.S. Army Command and General Staff College (CGSC) in order to attain AOC credit.

If left unchecked, the low rate of retention among Special Forces Captains could likely decimate the quantity and greatly reduce the quality of available field grade officers within the Special Forces Regiment. With the 2018 NDS and NSS both noting the great power competition as a primary U.S. national security concern, the 1<sup>st</sup> Special Forces Command needs not only the required number of strategic and analytical thinkers but also requires the best. Fortunately, the Special Forces Regiment is now in a better position than ever before to listen to its junior officers and make the necessary changes to turn the tide of departing captains.

### A. TIME TO MAKE CHANGES

MG Sonntag's recent initiative to shorten the Special Forces Qualification Course (SFQC) could not have come at a more beneficial time. By compressing the course from approximately two years to under one-year, Special Forces Captains will now have, on average, 5.5 years at their first Special Forces Group duty station as opposed to only four

years. The increased time at Group provides the opportunity for the 1<sup>st</sup> Special Forces Command to address all three of the top reasons that Special Forces Captains gave as reasons for potential attrition. By taking advantage of the additional time, the Special Forces Regiment can solve its retention problem among captains, improve the quality of its captains, and, in turn, better ready its future senior leadership. Taking advantage of the time provided directly aligns with the NSS and NDS goals to improve force readiness by molding refined critical thinkers and problem solvers.

## **B. RECOMMENDATIONS**

**Special Forces Captains must remain on an ODA as a Detachment Commander for longer than the average 18–24 months.** Not only do Special Forces Captains enjoy this position more than any other, but, as a Detachment Commander, junior officers learn the most, likely gaining the operational experience that will serve them well as field grade officers within the Special Forces Regiment. Now having 5.5 years at their initial tour of a Special Forces Group, DOPMA no longer limits a Detachment Commander to 18–24 months on a team. Three years as a Detachment Commander is not only feasible, but will lead to more experienced Detachment Commanders as well as more capable ODAs.

**The Special Forces Regiment must better ensure that Company and Battalion leadership mentor junior officers.** Multiple Special Forces Captains noted in the survey that they had rarely or never been counseled by their rater or senior rater, which is unacceptable not least because it leads to confusion about future opportunities. The increased timeline during Captains' initial tours inherently allows for improved mentorship, but leadership needs to put a solid plan into place that ensures this mentorship. Initial, quarterly, and OER counseling must occur for all Special Forces Captains.

**Special Forces Captains need increased, not lessened, opportunities to earn postgraduate education.** The ongoing push for 51% of resident-select O-4s to attend CGSC at Ft. Leavenworth is not only contributing to Special Forces Captains exiting the Army, but also limiting officers' abilities for advanced education to align with the 2018 NDS guidance. Within its talent management section of "Build a More Lethal Force," the

NDS states that “developing leaders who are competent in national-level decision-making requires broad revision of talent management among the Armed Services, including fellowships, civilian education, and assignments that increase understanding of interagency decision-making processes, as well as alliances and coalitions.”<sup>70</sup> Following the NDS guidance requires allowing top performing captains graduate school options, not forcing them to attend a “one size fits all” intermediate level education at CGSC. Fortunately, the 5.5 years that a Special Forces Captain will now have at group allows the time for several civilian education options while still ensuring officer AOC credentialing.

**This thesis highly recommends that the Special Forces Regiment leverage NDS and NDAA to create a GRADSO program as a way to increase retention of Special Forces Captains while ensuring force readiness in a dynamic and complex global environment.** Considering the survey results, allowing top performing captains to obtain an advanced civilian education will increase the retention of those officers who may otherwise choose to leave the army in pursuit of an advanced degree. Also, the United States within the near-peer threat environment, specifically concerning the Special Forces Regiment, would greatly benefit from having officers who are complex problem solvers. By having field grade officers with diverse educational backgrounds, Commanders will have the ability to pull from various expertise and, therefore, solve complex problems through multiple avenues of thought.

Future research on this topic may also highly benefit the regiment. Of particular interest, future researchers could consider how the policy changes to Advanced Operations Credit will affect current institutions of higher education such as NPS. Also, how has the SF Regiment been able to take advantage of the increased amount of time that its captains now have at their initial tour of an SF Group? Have these captains been able to earn master’s degrees from civilian or military institutions prior to or in conjunction with ILE? If possible, a similar survey should be sent out to YG 2013, 2014, 2015, and 2016 officers

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<sup>70</sup> Department of Defense, *Summary of the 2018 National Defense Strategy of the United States of America* (Washington, D.C.: January 2018), 8.



to assess their outlook on career stability and their career as a field grade officer within the SF Regiment.

Overall, increasing graduate opportunities for Special Forces Captains and paying attention to how they utilize those opportunities, creating mentorship guidelines and studying the effects, and ensuring the most operational experience possible will all aid in retaining more top-quality officers for the U.S. Army.

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