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Teaching Notes for CHAPTER 7: Leading Healing in a Broken Unit

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Leading Healing in a Broken Unit

By Edward H. Powley and Scott N. Taylor

Source material for this case study comes from the following: the first-hand experiences of an officer embedded within the ground combat element of a Marine Air Ground Task Force; reports on the use of improvised explosive devices (IEDs) in Iraq and Afghanistan; and first-hand knowledge of military officers recently returned from combat operations. Specific names, dates, and locations have been changed and descriptive background information added.

The announcement of increased deployments meant additional preparations for many military units that anticipated deployment to the U.S. Central Command (CENTCOM) area of operations. This case is about one ground combat element for a Marine Air Ground Task Force deployed into the CENTCOM area of operations. Excitement for the mission remained high, but extended deadlines well beyond the return date caused Marines and sailors to become wary. On top of their fatigue, a suicide bomber detonated himself at an entry control point, significantly affecting the morale and welfare of the unit. The blast killed several individuals and severely wounded nearly a dozen others. One of those killed in the blast was the well-known and well-respected senior enlisted leader of the ground combat element. In life, as in death, his presence affected the morale and productivity of the entire unit. Would his loss paralyze the unit? How would the unit rebound, pick up the pieces, and return with honor? How would the officers lead the unit toward healing in the remaining weeks of the deployment? These questions were in the forefront of the officers’ minds as they struggled to keep the unit moving forward.

BACKGROUND AND PURPOSE

To know an organization’s culture requires knowledge of basic assumptions that anchor norms and patterns of thought and actions. These norms and patterns become the culture of a unit and over time become accepted, unquestioned, and routine. They become “just the way we do things” or “just the way things have always been done here”. Organizational cultures (i.e., these “taken for granted” patterns and/or assumptions) help members create an environment that is predictable and understood. Cultures are thus “repositories” of answers to questions about who we are as an organization, how do we act, and what do we consider acceptable, for example. A unit or organization’s culture helps its members compare and contrast themselves with other organizations and help newcomers integrate into the organization.

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Thus, the culture of a military unit, for example, contains answers to the following sorts of unspoken questions:

- How do we maintain routine procedures developed in predeployment exercises?
- How do we remain alert and not become complacent?
- How do the members of a unit become self-aware as individuals and how does a unit become aware of the patterns of behaviors it demonstrates (i.e., self-aware as a unit). How does a leader guide the men and women in this quest?
- How do we learn from tragedy and the loss of a leader?

Military unit leaders are central figures in helping to create and maintain cultures that represent some form of resolution to these and other crucial questions. When a military unit’s leader is lost in combat, a sense of stability and continuity in the organizational culture is threatened. Those who were under the leader’s influence can feel vulnerable and abandoned.

While much of the attention goes to leaders who are on the front line in extreme and complex contexts—the platoon or company commander, the firefighting captain, the SWAT team leader—this case provides an important look at the leaders of units in which such teams operate. The case looks for ways to manage tensions and dilemmas created when military units lose their leaders who play an important part in creating and maintaining the organizational cultures. Organizations must learn to adapt, and new leaders (junior officers in this case) must know how to respond in crucial moments. Both officers and enlisted leaders have the responsibility to create systems, structures, processes, and relationships that maintain clearly defined routines that minimize the extent and effects of unpredictability. They also must create units capable of identifying and learning from both near misses and actual errors. How should those “next in command” respond to the loss of a team leader? How might they respond to the context of a deep-seated anxiety running beneath the surface of their units about the painful costs of loss and uncertainty about the future?

**OBJECTIVES**

The objectives of this case are threefold:

1. To increase the ability to handle organizational dilemmas faced by military officers and non-military individuals and organizations dealing with acute emergencies involving trauma;

2. To develop analytical skills that armed forces professionals, U.S. government personnel, and others can use to make sense of leadership in complex operational conditions (e.g., loss of life, loss of leadership, loss of personnel, and so on); and

3. To examine how organizational managers or leaders might demonstrate how to lead recovery and healing in the face of difficult operational challenges (e.g., enabling organizational units to recover).
TARGET AUDIENCE

This case should work particularly well for new leaders or officers in a military context and, perhaps more importantly for senior officers charged with supervising new leaders (the CO, XO, or SEL). It may be useful for emergency medical personnel, fire-fighter units, and other homeland security personnel who may face similar questions of rupture that affect teams, organizational culture, and effectiveness. The aim is for these individuals to better train and prepare for complex operational environments. This case offers one approach to improve efforts to train officers more clearly on unit healing after attacks; dealing with extended, ambiguous timelines; or the like.

TEACHING THE CASE

Unlike prescriptive leadership books and practitioner articles, the purpose of a case study is to raise questions in the students’ minds about what constitutes effective practice. This case study does not seek to present clear conclusions or a checklist of things one must do to resolve the dilemmas presented in a case. Instead, its purpose is to help students to begin to establish their own ideas about how they might personally respond if found in a context of adversity, tragedy, or crisis. For these reasons, this case is descriptive of the events before and after the death of a SEL (Roger Selden) but does not make value judgments about the officer’s actions or those who took control after his death.

We recommend that the students come prepared for the case discussion by having read the case and one or two supplementary readings on leadership (see potential readings in the references section). The article “Values and Leadership” is a good place to start. It outlines an approach to values-based leadership where an organization faces a major crisis and provides a general framework by which to analyze leadership behaviors during and after traumatic incidents affecting subordinates and superiors alike. Students may use the framework by R. E. Quinn to discuss how the junior officers might handle the aftermath of the bombing. Quinn suggests that effective leaders are both internally directed and outwardly focused; that is, they make decisions based on core values (such as those espoused by the U.S. Marines), yet they direct their attention toward enabling and building others. Other references include K. Weick’s Managing the Unexpected, and E. H. Schein’s Organizational Culture and Leadership. These readings provide students an opportunity to reflect on principles related to leadership, healing, crisis management, and organizational culture.

The instructor might ask students to consider some of the following questions before the case discussion:

**Opening Questions**

• What are the core values of the Marine Corps?

• What does it take to be a Marine Corps leader?

• How does this differ from the ethos of other models of military leadership?
• How does this differ from civilian leadership in the public sector (e.g., political leaders) and in the private sector (e.g., business leads)
• Was Selden a leader?
• What leadership values did he exhibit?
• What were his goals as an officer?
• What is the importance of predeployment exercises?

Middle Questions
• Can leadership respond to/mitigate combat fatigue? Was fatigue (mental and physical) a factor in how Selden’s subordinates responded to his death?
• How do you prepare for the unexpected?
• How should those “next in command” respond to the loss of a team leader?
• Was leadership successful in responding to Selden’s death? Headquarters staff, commanding officer, executive officer, junior officers?
• What leadership values are presented in this case and what values are not presented?
• How might they respond in the context of a deep-seated anxiety running beneath the surface of their units about the painful costs of loss and uncertainty about the future?
• How does Selden’s loss affect the unit?
• To what extent does his loss paralyze the unit?
• What impact does a bombing of this nature and the subsequent overextended deployment have on the unit’s focus?
• Would a new leader be able to facilitate recovery and healing in the unit?

Ending Questions
• How do you instill values-based leadership in officer training?
• Can the values of the Marine Corps be aligned with a values-based leadership approach?
• What does an organization do to build a culture of values-based leadership?
• How do you foster an organizational culture that is more likely to experience healing after trauma?
TOPICAL DISCUSSION AREAS

The purpose of the case is to have students address dilemmas related to at least three subject areas: (1) leadership under conditions of uncertainty and circumstances of decreasing morale; (2) organizational and unit culture; (3) healing; and (4) values. Students may note what made the officers’ leadership exemplary and how their leadership created routines that led to effective functioning of the unit. In doing so, students should begin to map out how leaders can positively affect team and organizational culture.

The case lends itself to a discussion of values at the individual, team and organizational levels. It can be used to engage students in a discussion of how teams and those who must step forward to lead them could ideally respond to adversity or crises, such as the tragic loss of a leader. Students can also discuss leadership in an atmosphere of decreasing morale and fatigue, challenging external pressures, and particularly threatening environmental stresses. In doing so, students will be exposed to principles of organizational resilience and healing, and how to reestablish and further develop a team’s culture following a tragic event.

Research on leadership has equated top performance with economic imperatives such as organizational effectiveness and financial performance. For example, leadership in crisis has focused on how to lead through a business failure, unethical practices, downsizing, bankruptcy, or economic downturns. “Good” leadership in these situations often means organizations are effective at leading change, generating positive attitudes, good financial returns, operating efficiently, and maintaining high productivity. Leaders’ actions reflect the prevailing logic of their position. Action based on economic imperatives alone, however, has led a number of organizations to financial ruin and overall economic downturn. Leadership from this perspective may be viewed as amoral, individual value-based, and ideological.

Studies of leadership are often concerned with descriptions or characteristics of a leader. Who and how a leader responds—aspects we believe are important for values-based leadership—are captured in various conceptualizations such as servant leadership, spiritual leadership, authentic leadership, resonant leadership, the fundamental state of leadership, or the 8th habit. In each, leader attributes are markedly similar: Leaders are more in touch with their personal identities, their values, and their ideal aspirations, and they focus attention on others rather than themselves. These internal resources then serve as guides to dictate how leaders lead others. R. E. Quinn, for example, describes leading with values as being internally directed, other-focused, externally open, and purpose-centered. His view is one where the leader turns toward others to transcend self-serving needs:

In the fundamental state of leadership, we . . . become less externally directed and more internally directed. . . . We begin to transcend our own hypocrisy, closing the gap between who we think we are and who we think we should be. In this process of victory over self, we feel more integrity and we feel more whole. Our values and behavior are becoming more congruent. Our internal and external realities are becoming more aligned. . . . We also become less self-focused and more other-focused.
R. E. Boyatzis and A. McKee’s *Resonant Leadership* is consistent with Quinn’s perspective: leaders are “awake, aware, and attuned to themselves, to others, and to the world around them.”

In fact, research has shown that empathy is positively related to perceived leadership; that is, leaders are thought to be more empathetic. Resonant leaders are also mindful, seeking to “live in full consciousness of self, others, nature, and society;” face challenges with hope, inspire “clarity of vision, optimism’” and “face sacrifice, difficulties, and challenges, as well as opportunities, with empathy and compassion for the people they lead and those they serve.” For Boyatzis and McKee, values-based leadership is built on both personal awareness and social awareness. The first impacts the second, so the individual can better manage relationships.

A values-based leader possesses a high degree of self-knowledge and social awareness. The leader has a deep understanding of his/her emotions, weaknesses, strengths, wants, needs, and drives. These individuals, who have a well-developed sense of self-awareness, maintain an attitude that is not too critical or unrealistically confident. They tend to be honest with themselves and with other people. Awareness of strengths and weakness lead to effective planning and execution of goals, because the leader knows how one’s own feelings will affect oneself and also how one’s feelings will affect other people. Moreover, these leaders’ self-knowledge enables them to work well with and manage others.

Values-based leadership is based on one’s character and ability to foster and create positive social connections. Anyone, regardless of managerial position, can display values-based leadership, because it manifests itself primarily in relationships and interactions between organizational members. In particular, values-based leadership in extreme situations, such as war or terrorism, is focused on helping the unit and its members toward restoring unit cohesiveness and effectiveness. The psychological literature refers to these attributes as the “character” of the leader, character defined as “the sum of the moral and mental qualities which distinguish an individual or a race; mental or moral constitution; moral qualities strongly developed or strikingly displayed.”

We are particularly interested in the character strikingly and consistently displayed by values-based leaders in moments of extreme crisis. D. A. Bednar effectively describes this leader behavior as:

[The] capacity to recognize, and appropriately respond to other people who are experiencing the very challenge or adversity that is most immediately and forcefully pressing upon [the leader]. Character is revealed, for example, in the power to discern the suffering of other people when we ourselves are suffering . . . [and] is demonstrated by looking and reaching outward when the natural and instinctive response is to be self-absorbed and turn inward.

We believe the behavior described by Bednar, Boyatzis, Quinn, and others is consistent with how military leaders operate under situations of extreme stress. Their behavior is a manifestation of their unique character. Due to the complexity and difficulty of fighting nontraditional warfare, training leaders involves an imperative based on values, especially when desired outcomes for leaders rest on relationship and coalition building, managing multiple fronts, and dealing with a high degree of uncertainty in the situational environment. As S. G. Yackley notes, “The leader’s character is a strategic source of power for infusing the culture of his/her organization with a code of ethics, moral vision, imagination, and courage.”

The Army
War College *Strategic Leadership Primer* states that the strategic leader is “The Values Champion—the standard bearer beyond reproach.” Thus, training for readiness involves not only training to specific situations but also developing strong character and moral values.

**Leadership**

Three related issues point to important considerations about leadership: (1) leadership styles and leader character; (2) physical and mental fatigue that comes with deployment; and (3) fatigue that comes from not knowing when the deployment will end. Given the delayed redeployment, this incident caused morale and motivation to dip even further.

The timeframe discussed in this case describes a military unit that operated without the involvement of peacekeepers or U.S. government reconstruction and stabilization personnel. On the other hand, we believe the principles of leadership described herein are applicable to all such groups as well as non-military personnel found in the civilian sector (e.g., corporations, non-for-profit, etc.) because the leadership principles described are relationship and character based in their emphasis.

Section chiefs and officers in charge were unsure how the unit as a whole would cope with this loss and the decreased morale, but more importantly with how they would be affected and how it would affect their performance during the rest of the deployment. The incident itself only lasted a few seconds, but the consequences of the incident had great potential to create additional adverse impacts on performance and behavior for the remainder of the extended deployment. Analysis of the case might address several ongoing, simultaneous issues:

- Leadership is a messy activity and not always straightforward, not always top down.
- Leadership, more than ever, requires leaders be prepared to manage under circumstances that are volatile, uncertain, complex, and ambiguous.
- Unit cohesiveness and resilience are essential for sustained leader effectiveness.
- Leaders must be emotionally competent, self-aware and empathetic —aware of their own emotions and those of others, and able to draw on their emotions to manage themselves and others.
- Effective leaders are purpose centered, internally driven, and focused on others rather than on themselves.
- Emotional and physical challenges are inevitable, given unexpected circumstances.

Questions related to effective leadership might include:

- What did Roger Selden do that made him an effective leader?
- Was Selden an emotionally competent leader? Explain your answer with evidence from the case.
• How did the SEL that took Selden’s place lead differently than Selden? What was the impact of the new SEL’s leadership?

• Were the officers effective in their leadership? Explain your answer with evidence from the case.

• How differently would you have led, under these circumstances?

• What do emotionally competent leaders do to lead effectively?

• What did the leaders in this case do to maintain/improve positive morale? Explain your answer with evidence from the case.

In the case of the senior enlisted leader, effective actions or leadership attributes included:

• Taking the time to get to know his troops by name and learning about their lives;

• Commanding respect not because of his status and position but because of his example as a leader, his tough love, and his straight-shooting leadership style;

• Speaking about his values and why he joined the military;

• Creating aspirations in many of his subordinates to achieve his position because of what they saw and admired in him;

• Acting immediately when he saw the suicide bomber, and did not hesitate to consider his actions or the moral foundation for the war. Instead, when he saw a threat to his men, he stepped out to lead;

• Understanding his mission: to fight for his country and protect his men at all costs;

• Developing respect for his candor and strength in working with the enlisted ranks;

• Calling for advice in dealing with enlisted matters;

• Understanding his troops and their motivations, standing by them, and recommending lighter punishments where he saw a need to maintain morale over creating more frustration among his ranks;

• Was approachable because of his hard work ethic, combined with his lighthearted temperament. These attributes made it easy to seek him out, to request his help, and to know what to expect when something went well or did not go well;

• Preparing conscientiously for sorties;

• Taking work seriously because of the honor and integrity taught him by being in the Marines and
• Staying with his men, working alongside them, and training and leading them up until the last moments of his life.

The case intentionally leaves much to doubt regarding junior officers’ leadership ability. The predeployment workups offered an important source of leadership development. The junior officers and officers in charge had set two goals for their sections and individual units. They felt they had accomplished these goals during the predeployment training exercises. Officers took action in a number of ways:

• Allowing the enlisted men to take some time to digest what had taken place and not have to deal with the intimate details of the aftermath;

• Taking on the added workload and carrying as much of the burden as they could;

• Ensuring that the lines of communication remained open, e.g., the section chief, directly following the incident, sat the enlisted men down to discuss what had happened;

• Expressing their own feelings to the troops and stating they were sympathetic and available if they ever needed to talk;

• Making clear that the mission remained the top priority and emphasizing the need to stay focused;

• Allowing anyone who desired to pay his or her respects to the senior enlisted leader and to share what they remembered about those who died and why they looked up to or admired them; and

• Holding a ceremony where they burned the senior enlisted leader’s approved retirement pack in effigy.

Culture & Healing

Students may analyze several parallel issues relating to culture and healing:

• Culture consists of the basic assumptions people have about the organization and the way things are done and how people think about the organization. These assumptions are often unquestioned and taken for granted.29

• Team and organizational cultures enable their members to have relatively clear ways to frame and thus act within situations that might otherwise be ambiguous or confusing.

• Military unit leaders are central figures in helping to create and maintain cultures.
This case provides an important look at the ways leaders create certain cultures that in turn provide a framework for responding to crucial moments.

Questions about a unit’s culture, resilience, and ability to heal might be used in a class discussion or paper assignment:

- How can a leader aid or inhibit healing in a unit?
- Will the unit hold together and remain resilient?
- What is going to be required to keep them resilient so that healing can take place?
- Are they going to be able to make it through the extreme stress?
- What complex system issues need careful examination to enable healing and recovery?
- What relationships are critical?
- What emotions does this case evoke?
- What actions might leaders or senior enlisted men take to reintegrate the unit and to strengthen its culture?

Values

Students may address several parallel issues related to values:

- Values are basic convictions or beliefs about what is right, good, and/or desirable. They may be instrumental or terminal and are relatively stable and enduring.
- Paying attention to values is important, because they influence both attitudes and behavior.
- It is easier to be congruent to our character when we are clear about our values.
- If we remind ourselves of our values often and make them effectual in our lives, we are more likely to think before we act.
- We can choose our actions based on our values instead of reacting to our emotions and circumstances.

Questions related to values-based leadership may include:

- What role can values play when facing difficult circumstance or a crisis?
What factors have influenced your values?

How can you tell if someone is true to his or her espoused values?

In your view, how important is it to be true to our values?

Each of these three categories, and others the student may discover, are present in the descriptions of the actions by Selden and the other leaders. The instructor might ask students to identify these categories and discuss how they exemplified the three areas noted above. Alternatively, instructors might ask students to identify their own ideas of themes and present why they are key to the culture of the military unit and the healing process.

These discussions can occur in the plenary with the entire class, or they might take place in smaller group discussions, perhaps with three-four students, and then presented to the class for general analysis and discussion.

POTENTIAL EXPERIENTIAL ASSIGNMENTS

As a follow-up to the case discussion, instructors might ask students to do the following as a way to further their learning about key principles of leadership during and after a crisis. These exercises are intended to be used over a longer period than for one class and may be integrated with other cases dealing with organizational crisis, leadership, and managing unexpected incidents.

- Interview a few people who know you well and have seen how you respond to adverse circumstances. Ask them to describe four examples of effective behaviors you demonstrated at a time of crisis. From these interviews, compose a list of key strengths that you possess in times of crisis or adversity.

- Interview someone you know who responded in an exemplary way to an adversity, tragedy, or crisis they faced. Ask the person you interview to tell you about the circumstances that led up to the adverse situation, describe what he or she was thinking and feeling, how the person responded to the adversity and why he or she responded the way he or she did. Finally, ask the person you interview what he or she learned from the experience. Write up a two- to three-page memo describing what you learned from this interview and how you will take what you learned and apply it to your own leadership opportunities/challenges.

- Write a short case study of an adversity you experienced and responded to-- successfully or unsuccessfully. Use the readings and the key learning from the case study covered in class to analyze what you did well or how you could have responded more effectively to your personal adversity.

- Choose one leadership behavior you would like to develop to be better prepared to lead effectively in times of adversity. Determine how you will develop this leadership behavior,
and start practicing the behavior in all contexts of your life. Be prepared to share what you chose to work on, how you are working on it, and your assessment of how it is going so far.

Additional Materials:

The following materials present how organizations and their leaders can manage effectively in times of crisis. These readings offer principles of leadership and effective analysis tools and methods for the dilemmas presented in the case.


**Videos to Show in Class**

- Ernest Shackleton
- Gettysburg
- Apollo 13
- Remember the Titans Videos and other website information at PBS *Frontline*:
  
  - http://www.pbs.org/wgbh/pages/frontline/shows/company/


15 Quinn, *Building the Bridge*.


17 Quinn, *Building the Bridge*, p. 22.

18 Boyatzis & McKee, *Resonant Leadership*, p. 3.


20 Ibid.


27 Goleman, Boyatzis, & McKee, *Primal Leadership*. 

29 Schein, *Organizational Culture*. 